PeopleSoft®

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xxv

PeopleSoft Application Prerequisites xxv

PeopleSoft Application Fundamentals xxv

Documentation Updates and Printed Documentation xxvi

Obtaining Documentation Updates xxvi

Ordering Printed Documentation xxvi

Additional Resources xxvii

Typographical Conventions and Visual Cues xxviii

Typographical Conventions xxviii

Visual Cues xxix

Country, Region, and Industry Identifiers xxx

Currency Codes xxx

Comments and Suggestions xxx

Common Elements Used in PeopleBooks xxxi

Preface

PeopleSoft Enterprise Recruiting and Admissions Preface xxxiii

PeopleSoft Products xxxiii

PeopleSoft Enterprise Campus Solutions Fundamentals xxxiii

PeopleBook Structure xxxiii

Chapter 1

Getting Started with PeopleSoft Recruiting and Admissions 1

PeopleSoft Recruiting and Admissions Overview 1

PeopleSoft Recruiting and Admissions Business Processes 1

PeopleSoft Recruiting and Admission Integrations 4

PeopleSoft Recruiting and Admissions Implementation 5

Chapter 2

Building Your Recruiting Structure 7

Setting Up Your Recruiting Structure 7

Pages Used to Set Up Your Recruiting Structure 8

Setting Up Region Codes....8
Setting Up Region Trees....9
Activating Region Trees....11
Setting Up Recruiting Categories....12
Setting Up Recruiting Centers....12
Setting Up Application Processing Centers....13
Defining Recruiters....14
Prerequisites....14
Pages Used to Identify Recruiters....15
Designating Recruiters....15
Assigning Recruiters to Recruiting Categories....16
Linking Recruiters to Geographic Regions....17
Associating Recruiters with Recruiting and Application Centers....18
Linking Recruiters with Academic Programs and Academic Plans....19

Chapter 3
Setting Up Prospects....21
Setting Up Admission Installation Defaults....21
Page Used to Set Up Admission Installation Defaults....21
Setting Up Admission Installation Defaults....22
Setting Up Admit Types....25
Page Used to Set Up Admit Types....25
Setting Up Admit Types....25
Setting Up Referral Sources....26
Page Used to Set Up Referral Sources....26
Setting Up Referral Sources....26
Setting Up School Types....26
Page Used to Set Up School Types....27
Setting Up School Types....27
Setting Up Extracurricular Activities....27
Page Used to Set Up Extracurricular Activities....28
Setting Up Extracurricular Activities....28
Setting Up Honors and Awards....29
Page Used to Set Up Honors and Awards....29
Setting Up Honors and Awards....29
Setting Up Student Groups....30
Page Used to Set Up Student Groups....31
Setting Up External Summary Types....31
Page Used to Set Up External Summary Types....31

Setting Up External GPA Tables....31
Pages Used to Set Up External GPA Tables....32
Defining External GPA Type Codes....32
Setting up GPA Conversion Rules for GPA Types....32
Reviewing Material Types and Defining Material Groups....33
Pages Used to Review Material Types and Define Material Group....34
Viewing Material Types....34
Using the Material Type Field Usage Page....35
Setting Up Material Groups....36

Chapter 4
Setting Up Self-Service Request Information and Using Self-Service Student Recruiting....37
Understanding Self-Service Request Information....37
Prerequisites....37
Requesting Self-Service Information....38
Setting Up Self-Service Request Information....39
Pages Used to Set Up Self-Service Request Information....39
Enabling Segments and Prospect Career Fields....39
Setting Up Institution and Career Parameters....41
Using Self-Service Student Recruiting for Recruiting and Admissions....42
Prerequisites....43
Pages Used to Manage Student Recruiting for Recruiting and Admissions....43

Chapter 5
Setting Up External Test Score Loads....45
Defining External Test Components....45
Page Used to Define External Test Components....46
Defining External Tests....46
Page Used to Define External Tests....46
Defining External Tests....46
Defining and Reviewing External Data Setup Tables....47
Pages Used to Review External Data Setup Tables....48
Mapping Ethnicity Codes....51
Mapping External Tests IDs....52
Understanding External Test ID Mapping....52
Page Used to Map External Tests IDs to PeopleSoft Test Codes....52
Mapping External Tests IDs to PeopleSoft Test Codes....52
Mapping External Test Codes to Internal Codes....53

Understanding External Test Data Mapping.....54
Pages Used to Map External Test Codes to Internal Codes.....56
Mapping Academic Interest Codes.....56
Mapping Extracurricular Activity Codes.....57
Mapping Religious Preference Codes.....59

Chapter 6
(CAN) Setting Up to Receive OUAC Transactions.....61
Setting Up EDI Manager for OUAC Transactions.....61
Setting Up OUAC Law Categories.....67
Page Used to Set Up OUAC Law Categories.....68
Setting Up Teaching Subjects and CEGEP Programs.....68
Page Used to Set Up Teaching Subjects.....68
Setting Up OUAC Organizations.....68
Page Used to Set Up OUAC Organizations.....69
Adding OUAC Organizations.....69
Entering OUAC Organization Data.....70
Specifying a Primary Contact and Department for an OUAC Organization.....70
Entering School Data.....71
Assigning GPA Types to OUAC Organizations.....71
Defining School Course Classifications for OUAC.....71
Defining the SECSCH Comment Category.....71

Chapter 7
Setting Up for Evaluating Applicants.....73
Prerequisites.....73
Pages Used to Set up Applicant Evaluation.....73
Defining Rating Schemes.....75
Using the Material Extract Detail Page.....76
Assigning Components to Rating Schemes.....76
Defining Evaluation Codes.....78
Defining Evaluation Committees for Admission Applications.....79
Defining Evaluation Status Codes.....80
Setting Up Student Response.....80
Page Used to Set Up Student Response.....81
Enabling Student Response for a School Type.....81

Chapter 8
Setting Up Admissions Program Actions and Program Action Reasons.....83
Setting Up Admissions Program Actions and Program Action Reasons.....83
Pages Used to Set Up Admissions Program Actions and Program Action Reasons.....84
Reviewing Admissions Program Action Values.....84
Defining Admissions Program Action Reason Values.....85

Chapter 9
Recruiting Prospective Students.....87
Understanding Adding Prospects.....87
Prerequisites.....87
Adding Prospects Through the Create/Update Prospects Component.....88
Pages Used to Add Prospects.....89
Entering and Updating Prospect Biographical Details.....89
Entering and Updating Prospect Regional Data.....89
Entering and Updating Prospect Academic Career Data.....89
Entering and Updating Prospect Academic Program Data.....91
Entering and Updating Prospect School and Recruiting Data.....93
Tracking Prospects Event Attendance.....96
Recording Event Meeting Information.....96
Adding Communications, Checklists and Comments for Prospects.....97
Creating Prospects When Posting External Test Scores.....97
Prerequisites.....98
Creating Prospects from Test Scores with Query.....98
Understanding Creating Prospects from Test Scores with Query.....98
Prerequisites.....99
Pages Used to Add Prospects From Test Scores Using Query.....100
Creating Prospects by Querying External Test Loads.....100
Selecting a Query.....102
Adding Prospects Through a System-wide Query.....103
Understanding Queries and Prospect Creation.....103
Pages Used to Add Prospects Through a System-wide Query.....104
Adding Prospects Through a System-wide Query.....104
Selecting a Query.....105
Viewing Prospect Information.....106
Pages Used to View Prospect Information.....106
Assigning Regions, Recruiting Categories, and Recruiters on a Mass Basis.....106
Understanding the Assignment of Regions, Recruiting Categories, and Recruiters on a Mass Basis.....106
Pages Used to Assign Regions, Recruiting Categories, and Recruiters on a Mass Basis.....108

Using General Criteria to Select the Prospect Group.....108
Using Academic Criteria to Select the Prospect Group.....111
Using Program and Plan Criteria to Select the Prospect Group.....112
Using Academic Interests Criteria to Select the Prospect Group.....113
Assigning Regions, Recruiters, and Recruiting Categories to the Prospect Group.....114

Chapter 10
Tracking Supporting Prospect and Applicant Information.....117
Prerequisites.....117
Tracking Supporting Information for Prospects and Applicants.....117
Pages Used to Track Supporting Information for Prospects and Applicants.....118
Tracking Academic Interests for Prospects and Applicants.....119
Tracking Electronic Addresses for Applicants.....120
Tracking Extracurricular Activities for Prospects and Applicants.....120
Tracking Honors and Awards for Prospects and Applicants.....120
Tracking Languages for Prospects and Applicants.....120
Tracking Names for Prospects and Applicants.....120
Tracking Publications for Prospects and Applicants.....120
Tracking Relations with Your Institution for Prospects and Applicants.....121
Tracking Relationships for Prospects and Applicants.....121
Tracking Residency Data for Prospects and Applicants.....121
Tracking Student Group Involvement for Prospects and Applicants.....121
Tracking Work Experience for Prospects and Applicants.....121
Tracking Test Results for Prospects and Applicants.....122
Viewing Academic Test Summary Information for Prospects and Applicants.....123
Viewing Event and Meeting Summary Information.....124
Viewing Schools by Groups.....124
Viewing an Account Summary.....124

Chapter 11
Tracking External Education Information.....125
Understanding External Education Information.....125
Entering and Updating External Data.....125
Pages Used to Enter and Update External Data.....126
Entering General External Data.....128
Entering and Updating External Academic Summary Information.....130
Entering and Updating External Subject Information.....132
Entering External Subject Area Details.....133

(CAN) Entering and Updating ESIS Data....134
Entering and Updating External Degrees....135
Entering and Updating External Courses....136
Entering External Course Default Data....138
Viewing Summary Education Data for Prospects and Applicants....139
Pages Used to View Summary Education Data for Prospects and Applicants....140
Viewing External Academic Summary Information....141
Viewing External Subject Summary Information....142
Viewing External Degree Summary Information....142
Viewing External Course Summary Information....143

Chapter 12
Tracking General and Application Materials for Prospects and Applicants....145
Entering General Materials for Prospects and Applicants....145
Pages Used to Enter General Materials for Prospects and Applicants....146
Linking Materials to an Application....147
Pages Used to Link Materials to an Applications....147
Entering General Materials....149
Adding Details About the Recommender....151
Viewing General Materials Summary Information for Prospects and Applicants....151
Manually Associating Supporting Materials to an Application....152
Linking General Materials to Applications....153
Viewing Summary Application Materials Information....154
Pages Used to View Summary Application Materials Information....154
Viewing Materials Summary Information....155
Viewing Academic Summary Information....156
Viewing Academic Subjects Summary Information....156
Viewing Course Summary Information....157

Chapter 13
Viewing Groups of Prospects or Applicants....159
Viewing Prospects and Applicants by Organization....159
Pages Used to View Prospects and Applicants by Organization....160
Viewing Prospects by Organization....160
Viewing Contact Information....162
Viewing Applicants by Organization....162
Viewing Prospects and Applicants Assigned to a Specific Recruiter....163
Pages Used to View Prospects Assigned to a Specific Recruiter by Category....164

Viewing Prospects Assigned to a Specific Recruiter by Category....164
Viewing Applicants Assigned to a Specific Recruiter, by Category....165
Viewing Prospects Assigned to a Specific Recruiter, by Region....167
Viewing Applicants Assigned to a Specific Recruiter, by Region....168

Chapter 14
Adding and Updating Applications....171
Adding New Applications Manually....171
Prerequisites....172
Pages Used to Add New Applications Manually....172
Entering or Updating Applicant Biographical Data....174
Entering or Updating Applicant Regional Data....175
Entering Application Program Data....175
Using the Calculate Deposit Fees Page....178
Entering Application Data....179
Application Fees Page....181
Application Items Page....182
Entering Recruiting Information for an Application....182
Adding Communications, Checklists and Comments for Applicants....185
Adding New Prospects and Applications with Quick Admit....186
Understanding Quick Enroll and Quick Admit....186
Pages Used to Add New Prospects/Applications with Quick Admit....189
Entering Biographical Details....189
Entering Regional Data....189
Entering or Viewing Academic Program Data....190
Selecting Your Criteria for Quick Admit Batch Apps....192
Assigning Criteria for Quick Admit....192
Creating Applications from External Test Score Data....195
Pages Used to Create Applications from External Test Score Data....197
Selecting the Test Score Data Load....197
Setting Up the Application Program Parameters....198
Setting Up the Application Data Parameters....199
Setting Up the Application Recruiting Parameters....200
Updating Applications....202
Prerequisites....202
Pages Used to Update Applications....203
Updating or Adding Application Program Data....203
Capturing Student Response – Why Student Selected Another Institution....204
Adding a Program to an Existing Application....205

Viewing Application Summary Information.....205
Pages Used to View Application Summary Information.....206
Calculating Application Fees in Batch.....206
Pages Used to Calculate Application Fees in Batch.....206
Calculating Application Fees in Batch.....206
Recording the Basis of Admission.....207
Pages Used to Record the Basis of Admission.....208
Defining the Basis of Admission Code.....208
Assigning a Basis of Admission to an Individual.....208
Recording Comments and Conditions for Admission.....210
Pages Used to Record Comments and Conditions for Admission.....211
Defining Admission Comment Codes.....211
Assigning Admission Comments to Applicants.....212
Viewing Summary Checklist, Comment, and Communication Data.....214

Chapter 15
Performing EDI TS130 Transcript Transactions.....215
Prerequisites.....215
Understanding EDI TS130 Transcript Transactions.....216
Understanding the EDI Applications and Transcripts Business Process.....218
Processing the Schedule Inbound EC Agent.....219
Loading EDI Data for Transcript Transactions.....219
Page Used to Load EDI Data for Transcript Transactions.....219
Loading TS130 Transcripts into Staging Tables.....220
Reviewing and Editing the EDI TS130 Staging Pages.....221
Pages Used to Review and Edit the EDI TS130 Data.....222
Reviewing EDI TS130 Staging Process Options.....224
Reviewing EDI TS130 Organization Staging Process Options.....226
Reviewing EDI TS130 Name Data.....229
Reviewing EDI TS130 Address Data.....229
Reviewing EDI TS130 Staging Bio/Demo Data.....230
Reviewing EDI TS130 Staging Bio/Demo (2) Data.....231
Reviewing EDI TS130 Requirements, Attributes, and Proficiencies.....231
Reviewing EDI TS130 Previous College Data.....232
Reviewing EDI TS130 Staging Organization Demographic Data.....233
Reviewing EDI TS130 Staging Academic Status Data.....234
Reviewing EDI TS130 Staging Activity Data.....234
Reviewing EDI TS130 Staging Test Score Data.....235
Reviewing EDI TS130 Staging Session Data.....236

Reviewing EDI TS130 Staging Academic Summary Data.....237
Reviewing EDI TS130 Staging Course Data.....237
Reviewing EDI TS130 Staging Degree Data.....239
Reviewing EDI TS130 Staging Additional Information.....240
Reviewing EDI TS130 Messages in the Staging Table.....242
Using the Organization Search Process.....243
Page Used to Run the Organization Search Process.....243
Setting Up TS130 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files.....244
Pages Used to Set Up TS130 Search/Match/Post Parameters, Process, and Post the EDI Staging Files.....245
Setting Up Search/Match Parameters.....245
Posting the EDI TS130 External Data.....246
Establishing Address Types.....248
Purging the EDI TS130 Staging Table and Messages.....248
Page Used to Purge the EDI TS130 Staging Table and Messages.....249
Purging Staging Tables.....249
Purging All EDI Messages.....250
Page Used to Purge All EDI Messages.....250

Chapter 16
Performing EDI TS189 Application Transactions.....251
Understanding EDI TS189 Application Transactions.....251
Loading the EDI Data for Application Transactions.....252
Page Used to Load the EDI Data for Application Transactions.....253
Loading Applications.....253
Reviewing and Editing the TS189 Staging Pages.....253
Pages Used to Review and Edit TS189 Staging Pages.....254
Reviewing TS189 Staging Address Data.....257
Reviewing TS189 Staging Communication Data.....257
Reviewing TS189 Staging Languages.....258
Reviewing TS189 Staging Recommender Data.....258
Reviewing TS189 Staging Residence Data.....260
Reviewing TS189 Staging Reference Numbers Data.....261
Reviewing TS189 Staging Application Degree Data.....262
Reviewing TS189 Staging Application Entry/Questions.....263
Reviewing TS189 Staging Cumulative GPA Data.....264
Reviewing TS189 Staging Employment Data.....265
Reviewing TS189 Staging Immunizations Data.....266

Reviewing TS189 Staging Religion Data....268
Reviewing TS189 Staging Activities Data....269
Searching for Matching Organization Data....270
Page Used to Search for Matching Organization Data....270
Using the EDI TS189 Organization Search Page....270
Setting Up TS189 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files....270
Pages Used to Set Up TS189 Search/Match/Post Parameters, Process, and Post EDI Staging Files....271
Setting Up the EDI TS189 Search/Match Parameters....271
Setting Post Parameters for EDI TS189 External Data....271
Setting Additional Post Parameters for EDI TS189 External Data....271
Purging the TS189 Staging Table and Messages....272
Page Used to Purge the EDI TS189 Staging Table and Messages....272
Purging the EDI TS189 Staging Table and Messages....273

Chapter 17
Processing External Test Scores....275
Understanding How to Process External Test Score Data....275
Loading External Test Score Files....277
Prerequisites....277
Page Used to Load External Test Score Files....277
Setting Up Load Parameters and Loading the File....277
Correcting and Editing Data in the Suspense Record....280
Understanding, Correcting, and Editing Suspense Data....280
Pages Used to Correct and Edit Data in the Suspense Record....281
Reviewing Test Score Suspense Data....286
Reviewing Personal Information....290
Reviewing Test Score Data....292
Performing Search/Match and Posting External Data....294
Understanding Performing Search/Match and Posting Test Scores....294
Page Used to Perform Search/Match/Post Test Scores....295
Search/Match/Post Test Scores....295
Setting Up Search Parameters for Test Score Data....298
Researching Duplicate Records....298
Re-Running the Search/Match/Post Process....299
Purging Suspense Files and Test Score Messages....299
Pages Used to Purge Suspense Files and Test Score Messages....300
Using the External Test Score Purge page....300
Reviewing Test Score Candidate Data....301

Understanding Reviewing Test Score Candidate Data.....301
Pages Used to Review Test Score Candidate Data.....301
Reviewing Candidate Data Personal Information.....305
Reviewing Academic Information.....307
Reviewing Student Profile High School and College Activity Information.....308
Reviewing Interest Information.....308
Viewing Test Score Messages Summary Information.....310
Page Used to View Test Score Messages Summary Information.....311
Viewing Test Score Messages Summary Information.....311

Chapter 18
(CAN) Receiving External Applications from OUAC.....313
Understanding External Applications from OUAC.....313
Pre-Loading OUAC Data.....314
Page Used to Pre-Load OUAC Data.....314
Using the OUAC Pre Load Parms Page.....314
Loading the OUAC Data Through the EDI Manager.....314
Loading Additional Data Through an SQR Process.....315
Page Used to Load Additional Data Through an SQR Process.....315
Reviewing and Editing the OUAC Transaction A/U Staging Tables.....315
Pages Used to Review and Edit the OUAC Transaction A/U Staging Tables.....316
Reviewing OUAC Transactions A1/U1.....316
Reviewing OUAC Transactions A2/U2.....317
Reviewing OUAC Transactions A3/U3.....317
Reviewing OUAC Transactions A4/U4.....317
Reviewing OUAC Transactions A5/U5.....318
Reviewing OUAC Transactions A6/U6.....318
Reviewing OUAC Transactions A7/U7.....319
Reviewing OUAC Transactions A8/U8.....319
Reviewing OUAC Transactions A9/U9.....320
Reviewing OUAC Transactions AR.....320
Reviewing and Editing the OUAC Transaction B5 Staging Tables.....321
Page Used to Review and Edit the OUAC Transaction B5 Staging Tables.....321
Using the OUAC B5 Page.....321
Reviewing and Editing the OUAC Transaction B/V-E Staging Tables.....322
Pages Used to Review and Edit the OUAC Transaction B/V-E Staging Tables.....323
Reviewing OUAC Transactions B1/V1.....323
Reviewing OUAC Transactions B2.....324
Reviewing OUAC Transactions B7/V7.....324

Reviewing OUAC Transactions B8/V8 325
Reviewing OUAC Transactions B9/V9 325
Reviewing OUAC Transactions C1 325
Reviewing OUAC Transactions C2 326
Reviewing OUAC Transactions D1 326
Reviewing OUAC Transactions E1 327
Reviewing and Editing the OUAC Transaction F Staging Tables 327
Pages Used to Review and Edit the OUAC Transaction F Staging Tables 328
Reviewing OUAC Transactions F1 328
Reviewing OUAC Transactions F2 328
Reviewing OUAC Transactions F3 329
Reviewing and Editing the OUAC Transaction G/H Staging Tables 330
Pages Used to Review and Edit the OUAC Transaction G/H Staging Tables 330
Reviewing OUAC Transactions G1/H1 330
Reviewing OUAC Transactions G2/H2 331
Reviewing OUAC Transactions G3/H3 331
Reviewing OUAC Transactions G4/H4 331
Reviewing OUAC Transactions G5/H5 332
Reviewing OUAC Transactions G6/H6 332
Reviewing OUAC Transactions G7/H7 333
Reviewing OUAC Transactions G8/H8 333
Reviewing and Editing the OUAC Transaction J-N Staging Tables 333
Pages Used to Review and Edit the OUAC Transaction J-N Staging Tables 334
Reviewing OUAC Transactions J/K 334
Reviewing OUAC Transactions J1/K1 335
Reviewing OUAC Transactions J2/K2 335
Reviewing OUAC Transactions J3/K3 336
Reviewing OUAC Transactions J4/K4 336
Reviewing OUAC Transactions J5/K5 337
Reviewing OUAC Transactions L1/N1 337
Reviewing OUAC Transactions M1 337
Reviewing OUAC Transactions M2 338
Reviewing and Editing the OUAC Transaction P-R Staging Tables 338
Pages Used to Review and Edit the OUAC Transaction P-R Staging Tables 339
Reviewing OUAC Transactions PI 339
Reviewing OUAC Transactions R/S 339
Reviewing OUAC Transactions R1/S1 340
Reviewing OUAC Transactions R2/S2 340
Reviewing OUAC Transactions R3/S3 341
Reviewing OUAC Transactions R4/S4 341

Reviewing and Editing the OUAC Transaction T Staging Table....342
Page Used to Review and Edit the OUAC Transaction T Staging Table....342
Using the OUAC T1 Page....342
Viewing Search/Match and OUAC Processing Statuses....343
Page Used to View Search/Match and OUAC Processing Statuses....343
Using the OUAC Suspense Page....343
Posting OUAC Transaction Data....344
Pages Used to Post OUAC Transaction Data....345
Setting Search Parameters for Posting OUAC Data....345
Setting OUAC Post Parameters....345
Setting Defaults for Posting OUAC Data....346
Setting More Post Parameters....347
Viewing OUAC Messages....348
Page Used to View OUAC Messages....349
Using the OUAC Messages Page....349
Reviewing Overflow OUAC Application Information....349
Pages Used to Review Overflow OUAC Application Information....350
Reviewing General OUAC Application Data....350
Reviewing OUAC Law Application Information....350
Reviewing OAUC Law Categories....351

Chapter 19
(NLD) Processing CBAP....353
Understanding CBAP....353
CBAP Process Steps....353
Loading CBAP Flat Files Into a Suspense Table....354
Using the Posting Process to Perform Search/Match....355
Process Suspense Data....356
Setting Up CBAP Parameters....357
Page Used to Set Up CBAP Parameters....358
Setting Up CBAP Parameters....358
Maintaining the CBAP Suspension Table....359
Pages Used to Maintain the CBAP Suspension Table....359
Editing Process Options....360
Entering Bio/Demo Data....362
Entering Address Information....363
Entering Academic Program Data....364
Entering Prior Graduation Information....366
Entering Subject Information....367

Entering Messages....368
Loading CBAP....369
Page Used to Load CBAP....369
Loading CBAP....369
Purging CBAP....371
Page Used to Purge CBAP....372
Purging CBAP....372
Posting CBAP....373
Pages Used to Post CBAP....373
Establishing CBAP Post Parameters....373
Establishing CBAP Search Parameters....374

Chapter 20
Evaluating Applicants....377
Understanding the Evaluating Applicants Business Process....377
Prerequisites....377
Evaluating Applicants Business Process....378
Creating General Evaluations....381
Pages Used to Create General Evaluations....382
Assigning an Evaluation Code to a General Evaluation....382
Linking General Materials to a General Evaluation....384
Assigning a Committee to a General Evaluation....384
Assigning Evaluators to a General Evaluation....385
Entering and Updating General Evaluator Ratings....387
Pages Used to Enter and Update General Evaluator Ratings....387
Entering and Updating General Evaluator Overall Ratings....387
Entering and Updating General Evaluator Ratings of Rating Components....388
Creating Application Evaluations....389
Pages Used to Create Application Evaluations....391
Assigning an Evaluation Code to an Application....392
Entering Overall Component Ratings for an Application....393
Assigning a Committee to an Application Evaluation....394
Assigning Evaluators to an Application Evaluation....395
Entering and Updating Evaluator Ratings for an Application....396
Pages Used to Enter and Update Evaluator Ratings for an Application....397
Entering and Updating Evaluator Overall Ratings for an Application Evaluation....397
Entering and Updating Evaluator Ratings of Individual Rating Components....398

Chapter 21
Evaluating Applicants Using Automatic Processing.....401
Understanding How to Evaluate Applicants Using Automatic Processing.....401
Assigning Evaluation Codes to Applications in Batch.....402
Page Used to Assign Evaluation Codes to Applications in Batch.....404
Running the Evaluation Code Assignment Process.....404
Linking Application Materials to Applications in Batch.....405
Page Used to Link Application Materials to Applications in Batch.....405
Linking Application Materials to Applications in Batch.....405
Calculating Rating Values through an Automatic Process.....406
Page Used to Calculate Rating Values through an Automatic Process.....406
Calculating Rating Values Through an Automatic Process.....406
Automatically Updating Application Program Evaluation Statuses.....408
Pages Used to Automatically Update Application Program Evaluation Statuses.....409
Updating Application Program Evaluation Status Using the Program Stack Update Process.....410
Calculating Enrollment Deposits Using the Deposit Fees Calc (Batch) Process.....411
Activating Applicants as Students Using the Activate Applications Process.....411

Chapter 22
Viewing Application Evaluation Summaries and Progression.....413
Viewing Application Evaluation Summaries.....413
Pages Used to View Application Evaluation Summaries.....414
Viewing Overall Results of an Application Evaluation.....414
Viewing Committee Results of an Application Evaluation.....415
Viewing Evaluator Results of an Application Evaluation.....416
Viewing Evaluator Detail Summary Information for an Application Evaluation.....417
Viewing a Summary of an Applicant's Progression.....418
Page Used to View a Summary of an Applicant's Progression.....419

Chapter 23
(NLD) Creating Educational Agreements.....421
Common Elements Used in This Section.....421
Maintaining Coursework and Agreement Information.....421
Page Used to Maintain Coursework and Agreement Information.....422
Maintaining Coursework and Agreement Information.....422
Maintaining Financial Contribution Information.....423
Page Used to Maintain Financial Contribution Information.....423
Maintaining Financial Contribution Information.....423

Reviewing and Updating Educational Agreements....424
Pages Used to Review and Update Educational Agreements....425
Reviewing and Updating Educational Contract Agreements....425
Reviewing Details of the OWO Contract....427
Adding General Text Appendixes....427
Determining a Selection Method for an Institution....427
Page Used to Determine a Selection Method for an Institution....427
Determining a Selection Method for an Institution....428
Creating OWO Contracts....428
Page Used to Create OWO Contracts....428
Creating OWO Contracts....428
Printing OWO Contracts....430
Page Used to Print OWO Contracts....430
Printing OWO Contracts....430

Chapter 24
Calculating Admissions Averages....433
Understanding Admissions Averages Calculation....433
Prerequisites....434
Setting Up Rules for the Admissions Averages SQC....435
Page Used to Set Up Rules for the Admissions Averages SQC....435
Setting Up Admissions Averages SQC Rules....435
Viewing an Average Program Calculation Example....437
Viewing an External Courses and Admissions Averages Example....440
Running the Application Materials Extract Process....441
Evaluating Applicants Based on Admissions Averages....441
Page Used to Evaluate Applicants Based on Admissions Averages....441
Running the Evaluation Calculation Process....441
Viewing the Newly Calculated Average....442
Correcting Admissions Calculation Errors....442
Viewing Admissions Calculation Errors....442
Running the Application Status Update Process....444
Updating Admissions Averages for Financial Aid and Student Records....444
Page Used to Update Admissions Averages for Financial Aid and Student Records....445
Using the Averages for Fin Aid and Records Page....445

Chapter 25
Using Admissions Average Cutoff Reports.....447
Understanding the Admissions Averages Cutoff Report.....447
Generating Admissions Average Cutoff Reports.....447
Pages Used to Generate Admissions Average Cutoff Reports.....448
Setting up the Average Cutoff Table.....448

Chapter 26
Creating Alternate Program Offers.....451
Understanding Alternate Program Offers.....451
Assigning Alternate Evaluation Codes.....451
Page Used to Assign Alternate Evaluation Codes.....452
Using the Alternate Offer Table Page.....452
Selecting Applicants for Alternate Offers.....452
Page Used to Select Applicants for Alternate Offers.....452
Using the Assign Alternate Eval Codes - Parameters Page.....452
Assigning Alternate Programs.....453
Page Used to Assigning Alternate Programs.....453
Running the Alternate Programs Process.....453
Viewing an Example of How Alternate Programs are Assigned to Students.....455

Chapter 27
Updating Application Program Actions and Statuses.....459
Understanding Admissions Program Actions and Statuses.....459
Updating the Program Action and Status of One Application.....465
Updating Program Actions and Statuses of Multiple Applications.....465
Page Used to Update Program Actions and Statuses of Multiple Applications.....465
Updating Program Action and Status of Multiple Applications.....465
Updating Program Actions and Statuses of Multiple Applications.....467
Understanding Multiple Application Program Action and Status Updates.....467
Pages Used to Run the Application Program Update Process.....468

Chapter 28
Managing Enrollment.....469
Understanding Enrollment Management Targets.....469
Learning About Enrollment Management Targets.....469
Learning About Cohort, Population, and Division.....469

Viewing Examples of Enrollment Management Targets....470
Setting Up Enrollment Management Targets....473
Pages Used to Define Divisions, Populations, and Cohorts....474
Defining a Cohort....474
Performing Enrollment Management....475
Pages Used to Perform Enrollment Management....476
Defining Enrollment Management Targets....477
Setting Additional Target Details....479
Processing Enrollment Management Targets....480
Displaying Enrollment Management Target Results....480
Displaying Target Results with the Enrollment Management Summary Page....480
Using Enrollment Management Target Templates....482
Pages Used to Use Enrollment Management Target Templates....482
Selecting the Target Information from the Old Detail....482
Generating Enrollment Management Reports....483
Pages Used to Generate Enrollment Management Reports....484

Chapter 29
Loading and Assigning EPS Market Codes....485
Understanding EPS Market Codes....485
Setting Up Code Types for EPS Organizations....485
Page Used to Set Up Code Types for EPS Organizations....486
Setting Up External Organization Code Types....486
Loading EPS Market Codes....486
Page Used to Load the EPS Market Codes....486
Running the EPS External Load Process....486
Viewing EPS Load Results....487
Pages Used to View EPS Load Results....488
Viewing EPS Zip Codes Loaded through the Load Process....488
Viewing EPS Market Codes Loaded through the Load Process....489
Viewing EPS Load Process Error Messages....489
Viewing EPS Suspense Messages....489
Viewing All Messages Generated from Loading EPS Market Codes....490
Assigning EPS Market Codes to an Organization....491
Pages Used to Assign EPS Market Codes to an Organization....491
Assigning Market Codes....491
Viewing and Maintaining the Organization External Codes....493
Printing and Purging EPS Market Codes....494
Page Used to Purge EPS Market Codes....494

Purging EPS Suspense Files.....494

Chapter 30
Deleting Prospect and Applicant Information.....497
Understanding the Prospect and Application Delete Feature.....497
Common Elements Used in This Chapter.....498
Deleting a Prospect Record.....499
Prerequisites.....499
Pages Used to Delete a Prospect Record.....500
Selecting Prospect Records to Delete.....500
Viewing the Prospect Delete Holding Table.....500
Running the Prospect Delete Process.....501
Deleting an Application.....502
Prerequisites.....502
Pages Used to Delete an Application.....503
Selecting Applications to Delete.....503
Viewing the Applicant Delete Holding Table.....504
Running the Application Delete Process.....504

Chapter 31
Producing a Year to Year Comparison Report.....505
Running the Admissions Funnel Report Process.....505
Page Used to Run the Admissions Funnel Report Process.....505
Running Admissions Funnel Reports.....505

Appendix A
PeopleSoft Recruiting and Admissions Reports.....509
PeopleSoft Recruiting and Admissions Reports: A-Z.....509
PeopleSoft Recruiting and Admissions Reports: Selected Reports.....512

Glossary of PeopleSoft Terms.....515

Index 537

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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 product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Recruiting and Admissions Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise Campus Solutions Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Recruiting and Admissions.

PeopleSoft Enterprise Campus Solutions Fundamentals

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation called *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*and *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise Campus Solutions operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "PeopleSoft Enterprise Campus Community Preface," PeopleSoft Enterprise Campus Solutions Application Fundamentals

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.

CHAPTER 1

Getting Started with PeopleSoft Recruiting and Admissions

This chapter provides an overview of PeopleSoft Recruiting and Admissions and discusses:

- PeopleSoft Recruiting and Admissions business process.
- PeopleSoft Recruiting and Admissions integrations.
- PeopleSoft Recruiting and Admissions implementation.

PeopleSoft Recruiting and Admissions Overview

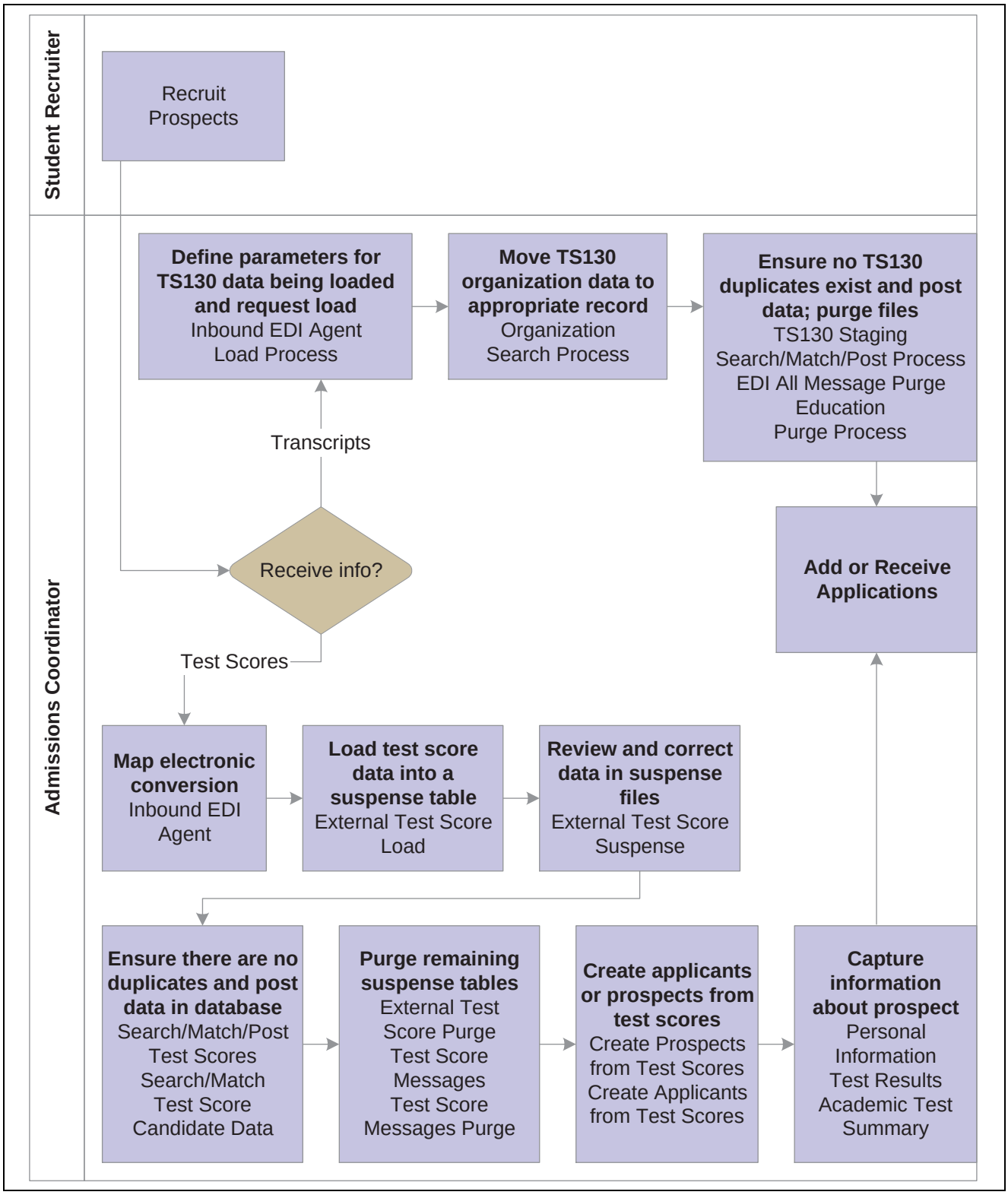
PeopleSoft Recruiting and Admissions helps you plan, manage, and track admissions and recruitment activities.

With this application, you can:

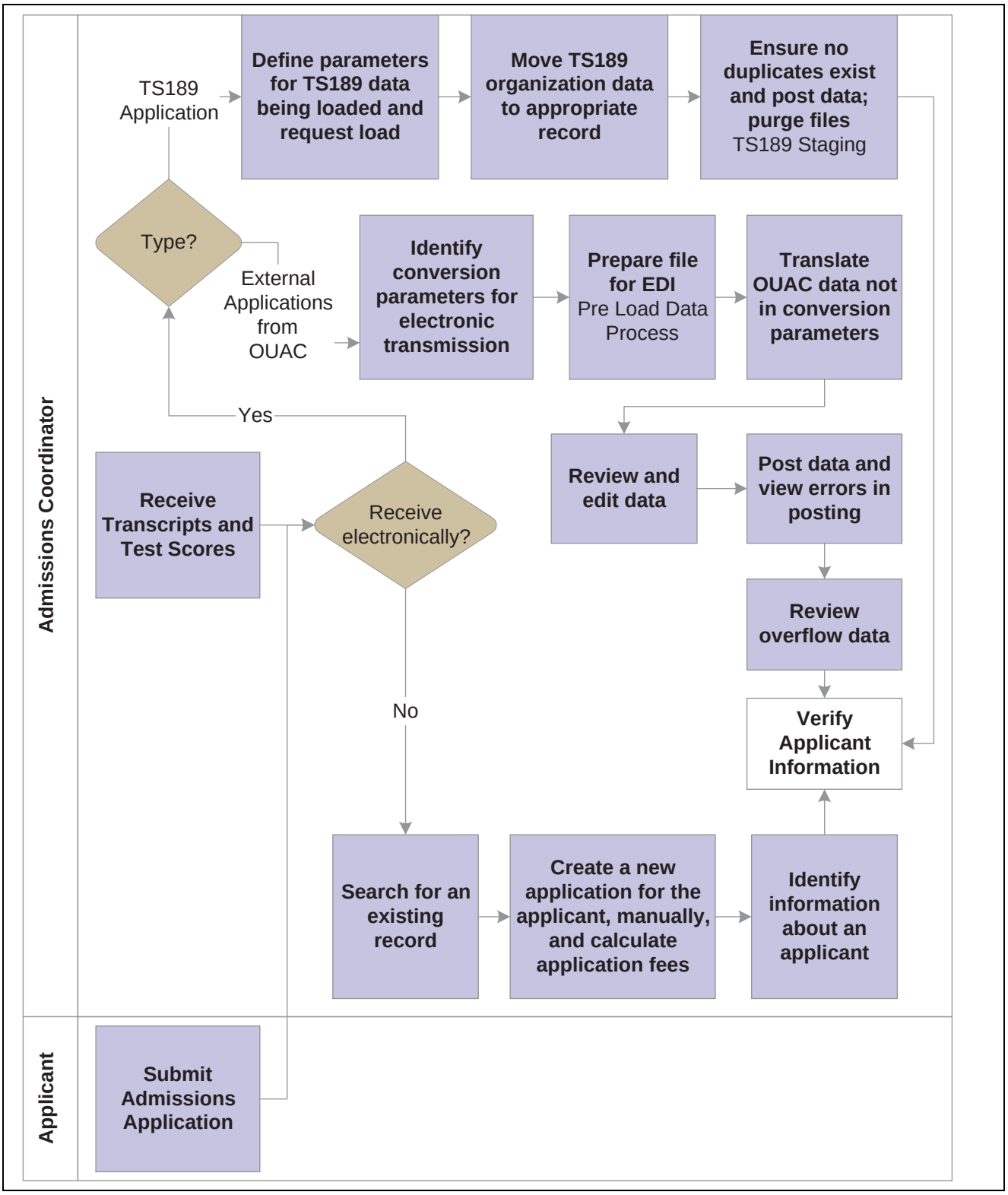
- Capture student recruiting information and analyze recruiting activities.
- Tailor your admissions system according to your requirements and practices.
- Set enrollment targets, track progress toward recruiting efforts, and analyze admissions decisions and patterns.

PeopleSoft Recruiting and Admissions Business Processes

The following process flows illustrates the PeopleSoft Recruiting and Admissions business processes:



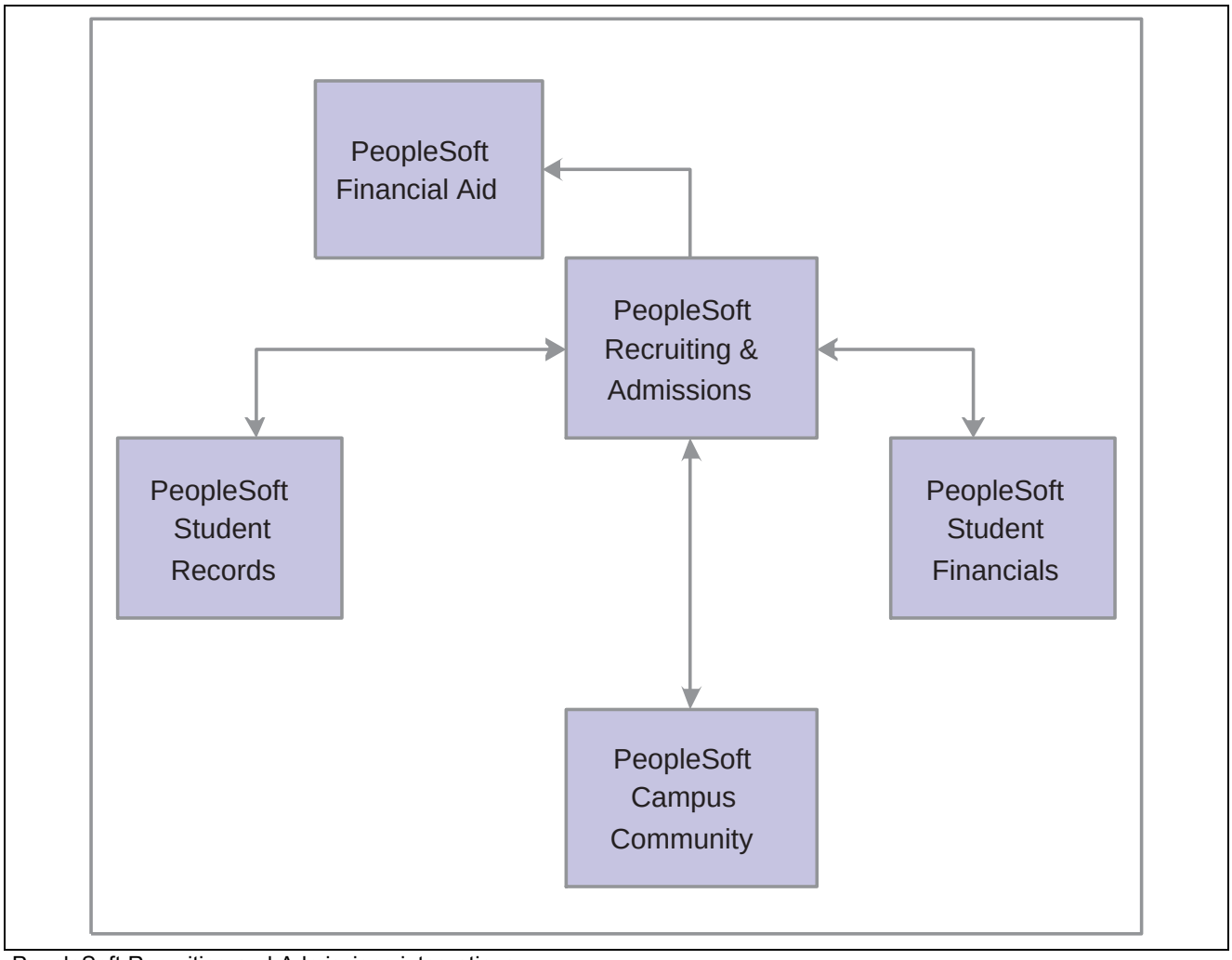
Receive transcripts and test scores business process



Add or receive applications business process

PeopleSoft Recruiting and Admission Integrations

PeopleSoft Recruiting and Admissions integrates with these PeopleSoft applications:



PeopleSoft Recruiting and Admissions integrations

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

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Campus Community

Campus Community shares people data, such as names and addresses, and external organization data, for prospect, application and transcript processing, with Recruiting and Admissions.

PeopleSoft Student Financials

Recruiting and Admissions uses Student Financials functionality to process application fees and application deposits.

PeopleSoft Student Records

Recruiting and Admissions transfers application data with PeopleSoft Student Records after applicants have been matriculated. Student Records can then build student program and plan records without having to re-enter large amounts of information.

PeopleSoft Recruiting and Admissions Implementation

PeopleSoft Setup Manager 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.

PeopleSoft Recruiting and Admissions also provides component interfaces to help you load data from your existing system into PeoleSoft Recruiting and admissions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interface	References
CRS_MAJOR_CODE	SAD_CRS_MAJOR_CODE	See Chapter 5, "Setting Up External Test Score Loads," Defining and Reviewing External Data Setup Tables, page 47.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines. A complete list of the resources appears in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook* with information about where to find the most current version of each.

See Also

"PeopleSoft Enterprise Recruiting and Admissions Preface," PeopleSoft Enterprise Campus Solutions Fundamentals, page xxxiii

PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

Building Your Recruiting Structure

This chapter discusses how to:

- Set up your recruiting structure.
- Define recruiters.

Setting Up Your Recruiting Structure

To set up your recruiting structure, use the Region component (REGION_TABLE), Region Postal component (RGN_POSTAL_TABLE), Region SetID Effective Date Update component (RUN_AD505), Recruiting Category component (RECRUIT_CAT_TABLE), Recruiting Center component (ADM_RECRCTR_TBL), and Application Center component (ADM_APPLCTR_TBL).

An admissions recruiter can be anyone in your campus community (staff, faculty, student, alumni, and so forth) who helps with the recruiting and admissions process. Recruiters can recruit at different levels. For example, they can recruit by region, career, program, or plan and sub-plan. You can assign recruiters to prospects and applicants. You can assign recruiters, prospects, and applicants to geographic regions and various recruiting categories to match recruiters to prospects.

This section provides an overview of building your recruiting structure and discusses how to:

- Set up region codes.
- Define postal codes.
- Set up region trees.
- Activate region trees.
- Set up recruiting categories.
- Set up application processing centers.

Pages Used to Set Up Your Recruiting Structure

Page Name	Object Name	Navigation	Usage
Region Table	REGION_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Region Table	Define the geographic regions that your academic institution uses for recruiting and admissions.
Region Postal Table	REG_POSTAL_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Region Postal Table	Define postal codes for use in your region tree. You can define any number of postal codes for your regional recruiting purposes. Postal codes are used as the detail values, or *leaves,* of your region tree. It is vital to keep the region postal codes that you define on this page synchronized with the detail values on your region tree. Plan out your postal code values and enter them here before entering them into the region tree.
Region SetID Effdt Update (region setID effective date update)	RUNCTL_AD505	Student Recruiting, Student Recruiters, Region SetID Effdt Update	Run the Region SetID Effdt Update process, which activates region trees.
Recruiting Category Table	RECRUIT_CAT_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Recruiting Category Table	Set up your recruiting categories.
Recruiting Center Table	ADM_RECRCTR_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Recruiting Center Table	Create the admission recruiting centers for your institution.
Application Center Table	ADM_APPLCTR_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table	Set up your application centers.

Setting Up Region Codes

Access the Region Table page.

A region can be a continent, a country, a state, a portion of a state, a mix of states, or any regional grouping that is for recruiting. You can link applicants, prospects, schools, and recruiters to geographic regions. Use this linkage for informational purposes and for assigning recruiters to prospects and applicants according to where the person attends school or resides. Regions are required if you plan to use PeopleSoft Tree Manager to assign recruiters to prospects and applicants. Plan your regions and your region tree before defining codes.

Setting Up Region Trees

Before assigning recruiters to regions, set up a region tree for your academic institution using PeopleSoft Tree Manager. This section covers setting up region trees for your recruiting structure.

A region tree is a detailed and hierarchical representation of all the geographic regions that you use for recruiting purposes. Each region is represented on the region tree as a node that appears hierarchically. A city can reside within a county, a county within a state, and a state within a country. However, the lowest level on the tree must be postal code ranges.

Your system uses region trees when you assign recruiters to prospects and applicants. The region tree hierarchical structure enables you to include and exclude recruiters from a variety of regions within your recruiting structure. For example, you can have a West Coast recruiter who does not go to the state of California, except for the city of San Jose, but only for the postal code range of 95000-95199 within that city. In other words, you assigned the recruiter to the *West Coast* region but excluded her from the *California* region. Then you assigned her to the *San Jose* region but excluded her from every postal code range except *95000-95199*.

You assign a region to applicants in the Application Entry component, to prospects in the Prospect Data component, and to recruiters in the Recruiters component. When you assign recruiters to individual prospects and applicants (also in the Application Entry and Prospect Data components) the system uses the region tree to match recruiters to prospects and applicants, based on where they reside on the tree. For example, suppose that you assign an applicant to the region San Jose. Suppose further that you don't have any recruiters assigned at that level, but that you do have recruiters assigned to the region Santa Clara County. San Jose is a lower node of Santa Clara County. Thus, recruiters assigned to Santa Clara County are responsible for San Jose, and any other lower-level node on the region tree.

Using region trees, you can also assign recruiters to prospects and applicants in batch, using the Recruiter Assignment process. This process matches recruiters to prospects and applicants based on the postal code of the prospect's or applicant's home or last school attended.

Enter Regions in the Region Table Page

Although you can define new regions directly in PeopleSoft Tree Manager as you build your region tree, plan and define your regions in advance on the Region Table page. That way, all regions are available as you build your tree. You can always add additional regions through Tree Manager. When you define regions, print your region codes so that they are available while building your tree. You can also draw a map of your tree and include the actual region codes. Having a printed code list is valuable because you cannot prompt for defined region codes in PeopleSoft Tree Manager. Also, you are less likely to create duplicate or similar codes if you have a printed list.

Set Up Postal Codes on the Region Postal Code Table Page

Before you can define postal code values (detail values) on your tree, you must set up all of your postal codes on the Region Postal Table page. To verify that a detail exists on the Region Postal Table page, right-click that detail in the region tree. If you receive a message that the value is not found, then you must go to the Region Postal Table page and set it up. It is extremely important to keep the region postal codes on the Region Postal Table page synchronized with the detail values of your region tree. Postal codes cannot overlap regions. If you enter the zip + 4 postal code for prospect or applicant addresses, include the four digit extension when defining your postal code ranges for the regions. Example: The begin postal code should be defined as 914360000 and the end postal code should be defined as 914669999.

Define a Region Tree for Recruiting and Admissions

You base your region tree on a special tree structure, shipped with PeopleSoft Recruiting and Admissions, called REGION. This structure uses the country and postal code of either the applicant's school or the applicant's home address as detail nodes of the tree and the structure looks to the regions stored in the region table for all other tree nodes.

To set up your region tree, select PeopleTools, Tree Manager. Select the ADMISSIONS file cabinet. Highlight the delivered REGION tree. Then select File, New.

The Tree Definition dialog box opens. The following values should appear:

- The tree name is REGION.
- The status is *Active.*
- The structure ID is *REGION.*

Note. Your region tree must be based on the REGION structure that is provided with your system. Your system relies on this structure when matching recruiters to prospects and applicants.

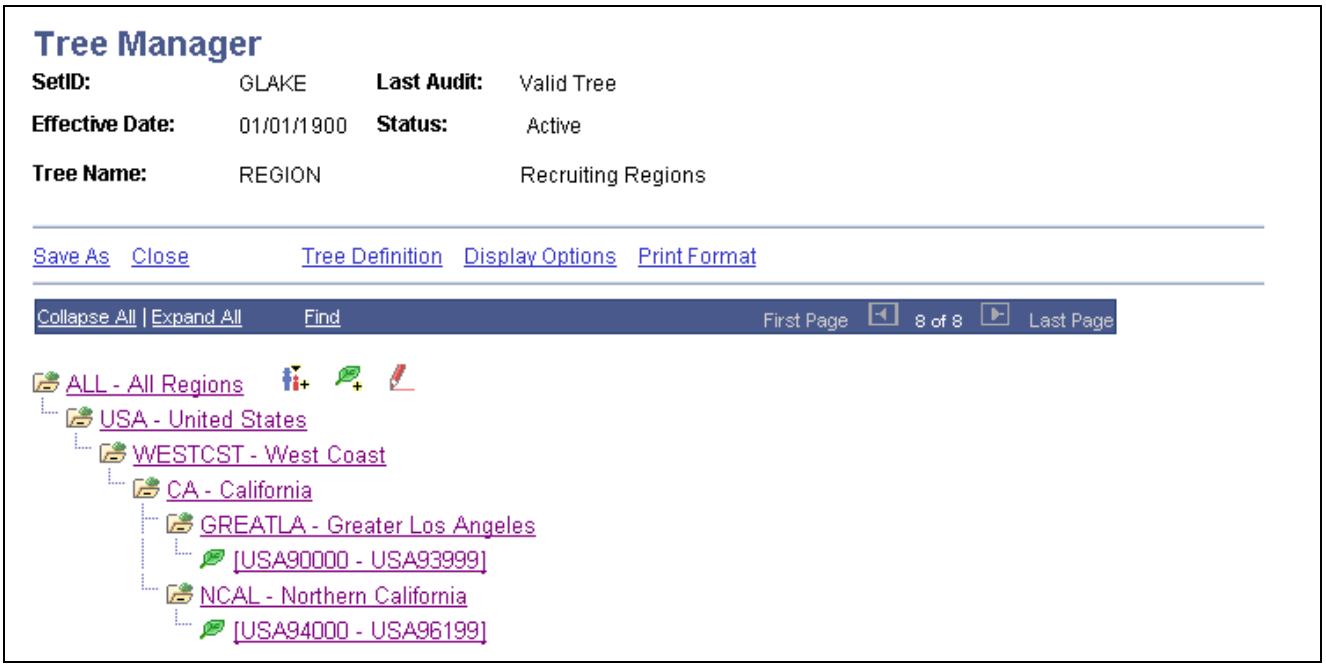
- The All Detail Values in This Tree check box is cleared.
- The Allow Duplicate Detail Values check box is cleared.
- The Strictly Enforced option is selected.
- Enter your institution's setID and an effective date. When you click OK, you return to the PeopleSoft Tree Manager panel, with the name of your region tree highlighted. The name of your region tree is the setID plus the effective date.

Delivered Region Tree Examples

PeopleSoft Recruiting and Admissions comes with three sample region trees that you can view to get an idea of a finished region tree. Each one is named REGION; they are listed, in order, under the following setIDs:

- *PSCCS*
- *GLAKE*
- *PSUNV*

The following is an example of part of the delivered GLAKE region tree.



PeopleSoft Tree Manager displaying part of the sample GLAKE region tree

See Also

Chapter 2, "Building Your Recruiting Structure," Setting Up Region Codes, page 8

Chapter 9, "Recruiting Prospective Students," page 87

PeopleSoft PeopleTools PeopleBook: Tree Manager

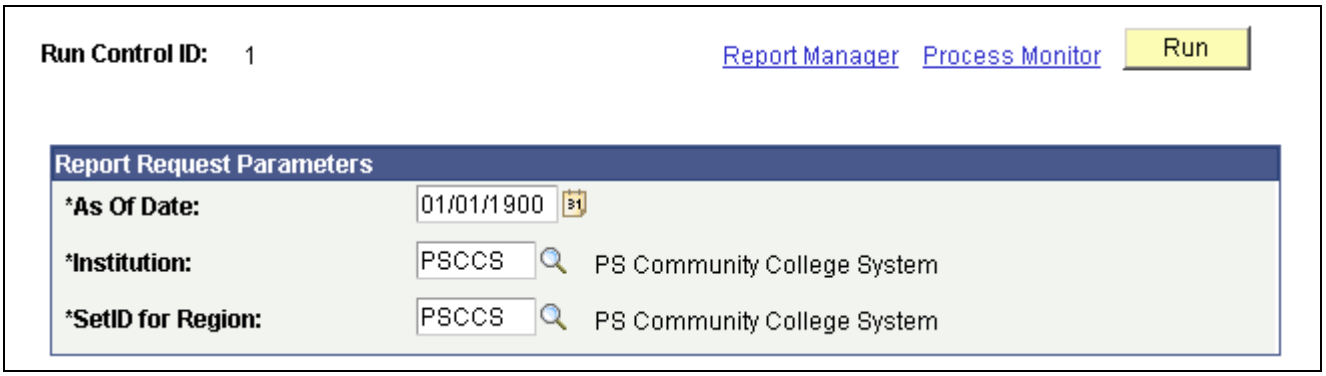
PeopleSoft PeopleTools PeopleBook: Tree Manager, "Printing a List of Regions"

Activating Region Trees

After you create a region tree or update an existing tree with a new effective date, you must activate it by running the Region SetID Effdt Update process.

Note. Region trees do not work unless you run this process.

Access the Region SetID Effdt Update page.



Region Setid Effdt Update page

As Of Date Enter a date equal to the effective date of the region tree.

Institution Enter the institution for which the region tree will be used.

SetID for Region Enter the setID that was used when creating the region tree.

Click the Run button and select AD505 to run the process. The process activates the most recent region tree with an effective date that is less than or equal to the date entered in the As Of Date field.

Setting Up Recruiting Categories

Access the Recruiting Category Table page.

Warning! You must create a recruiting category of *REGN* (region) so that you can use the flexibility of regional recruiting assignments. To automatically assign recruiters to prospects and applicants by region, define a *REGN* code in this table. The description can be anything, but the code must be *REGN.*

Recruiting categories enable you to track prospect and applicant interests. By assigning prospects and applicants to recruiting categories, you can give them the proper attention during the recruiting and admissions processes. You link recruiters to recruiting categories when setting up recruiters.

Recruitment Group Assign the recruiting category to a recruitment group. Your choices are *Academic, Alumni, Athletics, Music, Region,* and *Special.* Recruitment groups are delivered with your system as translate values. You can modify these translate values.

Important! Do not change or delete the translate value *Region.* It's required for automated region and recruiter assignment.

Move to Application Select to copy this recruiting information to the application record when the prospect who is assigned to this category becomes an applicant.

Academic Career Indicator Select to limit the recruiting category to one career. For example, you can create a recruiting category called *EXTV* for those prospects who are currently business executives and define it so that it's only available to your *BUSN* (graduate business) academic career. Enter the career to which you want the category limited in the Academic Career field.

Academic Career If you want this category to be available for only *one* academic career, select the Academic Career Indicator check box and enter the career here. If you want this recruiting category to be available to *all* careers, leave the Academic Career Indicator check box clear and this field blank. This field determines the recruiting categories that appear in the Recruiting Category field on the Application Recruiters and Prospect Recruiters pages. Define academic careers on the Academic Career Table page.

Note. When assigning a prospect or applicant to a recruitment group and category, you can indicate a further level of a person's interests by using a recruitment subcategory.

Setting Up Recruiting Centers

Access the Recruiting Category Table page.

The recruiting center helps to identify the prospects and recruiters who belong to a particular recruiting office. If you process applications in the same office as you process prospects, your application and recruiting centers are probably identical. If you have a decentralized recruiting structure, you can create a recruiting center for each office so that you can identify which office has responsibility for a specific prospect or applicant.

Academic Career Select an academic career if you want this recruiting center associated with only *one* academic career. If you want the recruiting center available to *all* academic careers, leave this field blank.

See Also

Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 14

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Setting Up Application Processing Centers

Access the Application Center Table page.

Note. You assign applications and link recruiters to application centers. This helps you to identify the applications and recruiters who belong to a particular admissions office.

Application centers are where admissions applications are processed. By defining application centers, you can track which office is handling a specific application. This is especially useful if you have decentralized processing for academic careers.

Academic Career Select an academic career if this application center is for only *one* academic career. If you want this application center available to *all* careers, leave this field blank. Define academic careers on the Academic Career Table page.

Application Fee Code Select the appropriate application fee code for this application center. Define application fee codes on the Application Fees page in PeopleSoft Student Financials. If you do not charge an application fee, you can leave this field blank.

Deposit Fee Code Select the appropriate deposit fee code used for this application center. Define deposit fee codes on the Deposit Fees page in PeopleSoft Student Financials. If you do not charge deposits, you can leave this field blank.

Calculate Deposit Fee in Batch Select if you want to allow users to *save* applications without calculating a deposit fee. When you enter a status of *Admitted* on the Application Program Data page, the system does *not* prompt you to calculate the deposit. Rather, you use the Deposit Fees Calc (deposit fees calculation) batch process (SFPBADEP) to calculate the deposit fee. This enables you to automate the deposit fee calculation process.

If you clear this check box, the system *does* prompt you to calculate a deposit fee when you enter a status of *Admitted* on the Application Program Data page.

SF Merchant ID Select a merchant ID for the application center. The merchant ID is a user-defined element that defines the rules for interfacing with a third-party credit card processor. Define student financials merchant IDs on the SF Merchants page in PeopleSoft Student Financials. Leave this blank if you

either do not accept credit cards for application fees or do not process application fees at all.

See Also

Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 14

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 175

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Setting Up ePayment Processing," Setting Up SF Merchants

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Defining Recruiters

After you have set up recruiters and related items such as regions, region trees, recruiting categories, and so on, you can identify and manage recruiters.

This section lists prerequisites and discusses how to:

- Designate individuals in your system as recruiters.
- Assign recruiters to recruiting categories.
- Associate recruiters with recruiting and application centers.
- Link recruiters with academic programs and academic plans.

Prerequisites

Before you can identify a person as a recruiter, he or she must first exist in your system.

To see if the recruiter is already in your system, select Student Recruiting, Student Recruiters, Search Match.

If you discover that the recruiter does *not* yet exist in your system, you can quickly add a record by choosing Student Recruiting, Student Recruiters, Add/Update a Person.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

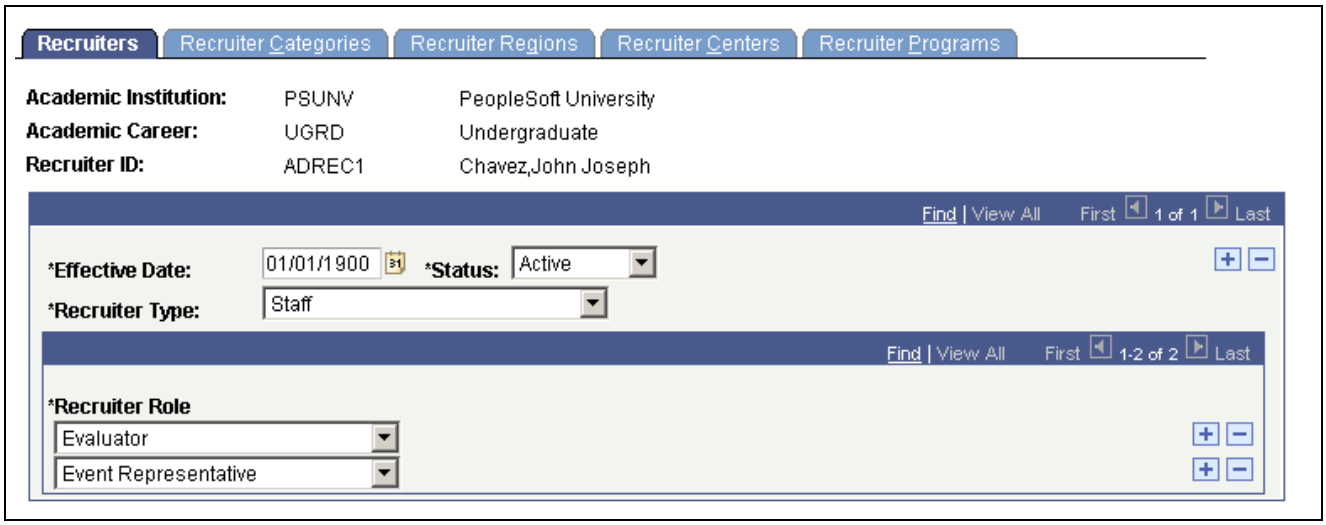
PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Adding an Individual to Your Database

Pages Used to Identify Recruiters

Page Name	Object Name	Navigation	Usage
Recruiters	RECRUITERS	Student Recruiting, Student Recruiters, Create/Update Recruiters	Designate a person as a recruiter or to update a recruiter's information.
Recruiter Categories	RECRUITER_RCR_CAT	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Categories	Assign recruiting categories to recruiters. This aids in recruiter assignment. You also assign recruiting categories to prospects and applicants, enabling you to match appropriate recruiters to prospective students.
Recruiter Regions	RECRUITER_REGIONS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Regions	Link recruiters at the career level to specific geographic regional assignments. You can also use this page to exclude recruiters from certain regions or external organizations. For example, you can assign a recruiter to the Texas region, but *exclude* him or her from Abilene and Waco. You also link prospects and applicants to geographic regions, enabling you to match appropriate recruiters to prospective students.
Recruiter Centers	RECRUITER_CENTERS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Centers	Link a recruiter to the appropriate recruiting and application centers, which is beneficial for grouping and reporting purposes. You can link prospects to recruiting centers and applicants to application centers.
Recruiter Programs	RECRUITER_PROGRAMS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Programs	Link recruiters to academic programs and academic plans.

Designating Recruiters

Access the Recruiters page.



Recruiters page

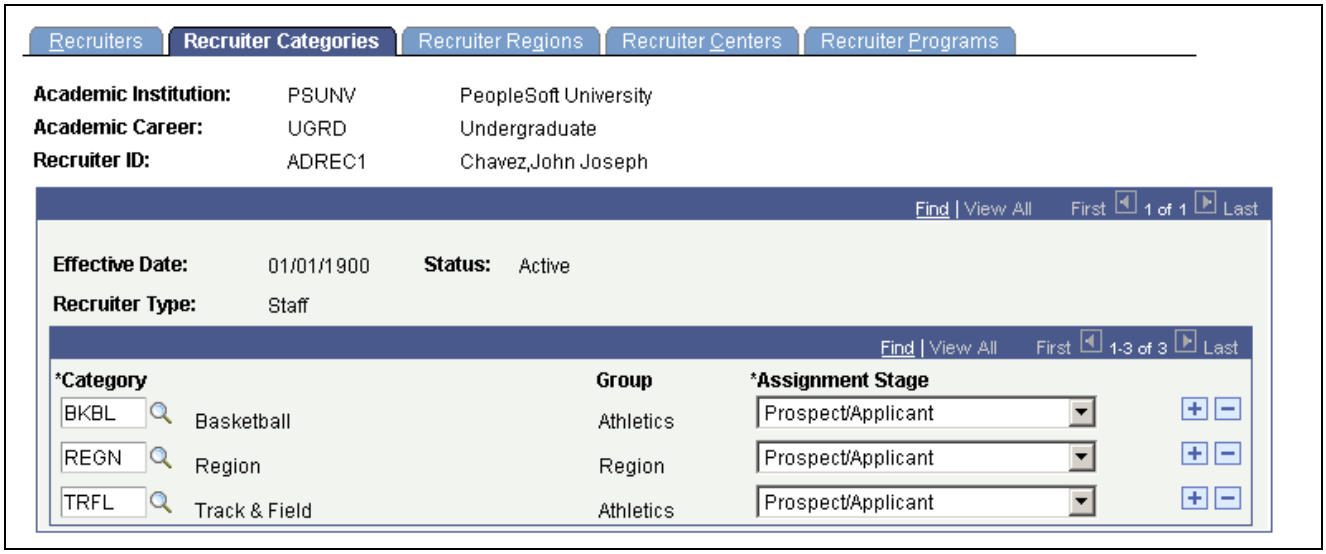
Recruiter Type Select a recruiter type for this person. Your options are *Alumni, Faculty, Staff,* and *Student.* Recruiter types are delivered with your system as translate values. You can modify these translate values.

Recruiter Role Select one or more recruiter roles for this person. In our example, John Chavezis both an evaluator and an interviewer. Add as many recruiter roles as are pertinent to this person. A recruiter can recruit for more than one career. Add the recruiter again, only enter the pertinent academic career when prompted.

Recruiter roles are delivered with your system as translate values. You can modify these translate values.

Assigning Recruiters to Recruiting Categories

Access the Recruiter Categories page.



Recruiter Categories page

Category Select the appropriate recruiting categories for this recruiter. Define categories on the Recruiting Category Table page. In the preceding page example, this recruiter is assigned to the *High Test Scores* and *Region* recruiting categories.

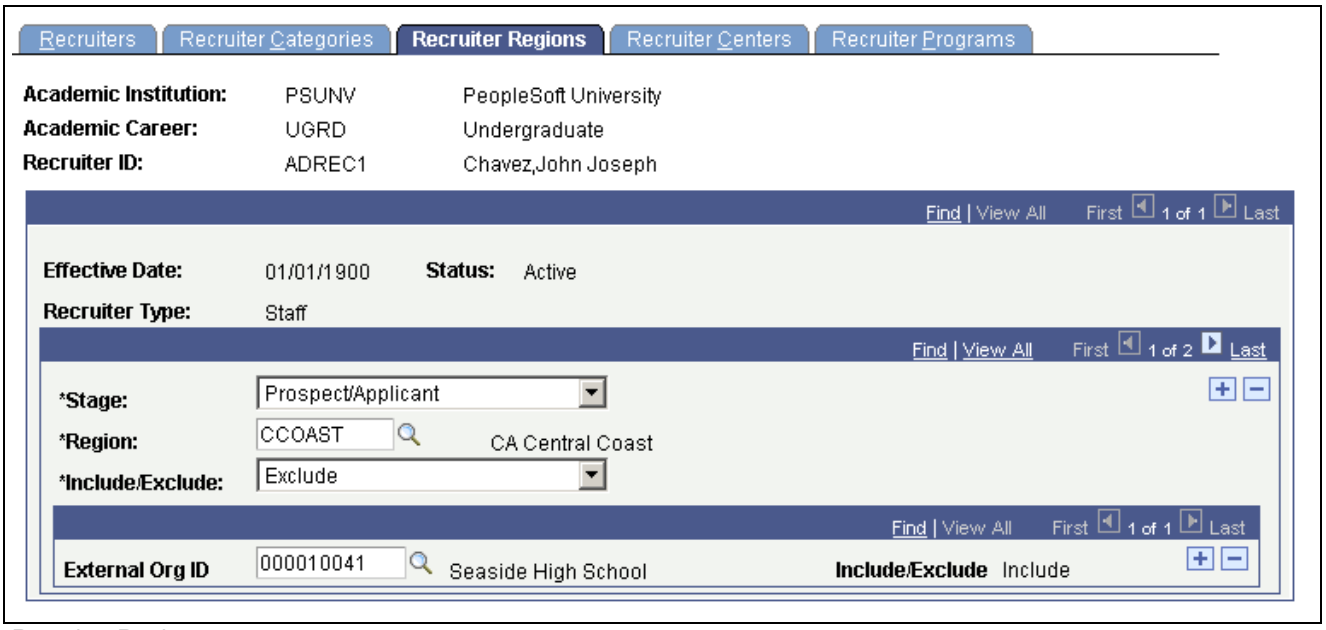
Group The group to which this category belongs.

Assignment Stage For each category, select the appropriate stage of recruiting in which this recruiter is involved. Your choices are *Applicant, Prospect/Applicant,* and *Prospect.* For track and field, basketball, and region, our example recruiter looks at prospects and applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.

Important! For your regional recruiters, assign them a category of *REGN.* This is important for automatic assignment of recruiters by region.

Linking Recruiters to Geographic Regions

Access the Recruiter Regions page.



Recruiter Regions page

Stage Select the stage of recruitment in which this recruiter is involved for this region. Your choices are *Applicant, Prosp/Appl* (prospect/applicant), and *Prospect.* Stage values are delivered with your system as translate values. Any modifications to these values require a substantial programming effort.

Region Select a region for this recruiter. This can be a region where this person recruits, or a region where this person does *not* recruit. Define regions on the Region Table page.

Include/Exclude Choose whether to *Include* the recruiter in or *Exclude* the recruiter from this region. If you select *Include,* the recruiter can be assigned to prospects or applicants in any school in that region. If you select *Exclude,* the recruiter can not be assigned to prospects or applicants in any school in that region.

Note. First add the regions where this person recruits. Then, if you must exclude the person from certain areas, add those rows last.

External Org ID (external organization ID) If you want a recruiter to recruit at a school in a region from which he or she is excluded (for example, include a school in an excluded region), or if you do not want a recruiter to recruit at a school in a region in which he or she is included (for example, exclude a school from an included region), select the external organization ID of the school you are including or excluding. All schools within the postal code range of the selected region are available.

Note. Be aware that you can only exclude or include a school (in the External Org ID field) from a region if the Region value entered is at the *lowest level region node* on your region tree. If the region value is at any other level, you cannot access the External Org ID field.

Include/Exclude The display-only Include/Exclude field (next to the External Org ID field) automatically contains the opposite value of that entered in the Include/Exclude field (below the Region field).

An Example of Including and Excluding Regions and Schools

You can be specific with your regional assignments. In the preceding page example, the recruiter is assigned to the region California. But perhaps this person does not recruit for the Central Coast. To set up this assignment, add a region row that excludes the California Central Coast region. This means the recruiter is now assigned to California, *except* for the Central Coast region. To further differentiate matters, this recruiter makes an exception regarding the California Central Coast: she recruits at one school within that region. As shown on the preceding page, recruiter John Chavez does *not* recruit in the California Central Coast. However, he does make an exception for Seaside High School.

Note. The recruiting region assignment structure simplifies your reporting needs. You can assign recruiters to very specific regions and still roll up your reporting to look at broad areas.

Associating Recruiters with Recruiting and Application Centers

Access the Recruiter Centers page.

Recruiting Center Select the recruiting centers to which this recruiter belongs for each applicable academic career. This assignment enables your admissions office to quickly identify its own recruiters. A recruiter can belong to multiple recruiting centers.

Application Center Select the application centers to which this recruiter belongs for each applicable academic career. This assignment enables your admissions office to quickly identify its own recruiters. A recruiter can belong to multiple application centers.

Note. For recruiters to have access to prospects and applicants within the recruiting and application centers that you select, you must grant the recruiters security access to these recruiting and application centers via the Recruiting Center Security and Application Center Security pages.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Linking Recruiters with Academic Programs and Academic Plans

Access the Recruiter Centers page.

Associating recruiters with academic programs and plans helps to track academic associations for all recruiters but is especially useful for graduate careers that typically offer many academic programs.

Academic Program Select the academic programs in which this recruiter is involved.

Academic Plan Select the academic plans, within the chosen academic programs, that apply to this recruiter.

CHAPTER 3

Setting Up Prospects

This chapter discusses how to :

- Set up admissions installation defaults.
- Set up admit types.
- Set up referral sources.
- Set up school types.
- Set up extracurricular activities.
- Set up honors and awards.
- Set up student groups.
- Set up external summary types.
- Set up GPA tables.
- Review material types and define material groups.

Setting Up Admission Installation Defaults

To set up admission installation defaults, use the Installation Defaults - AD component (INSTALLATION_AD).

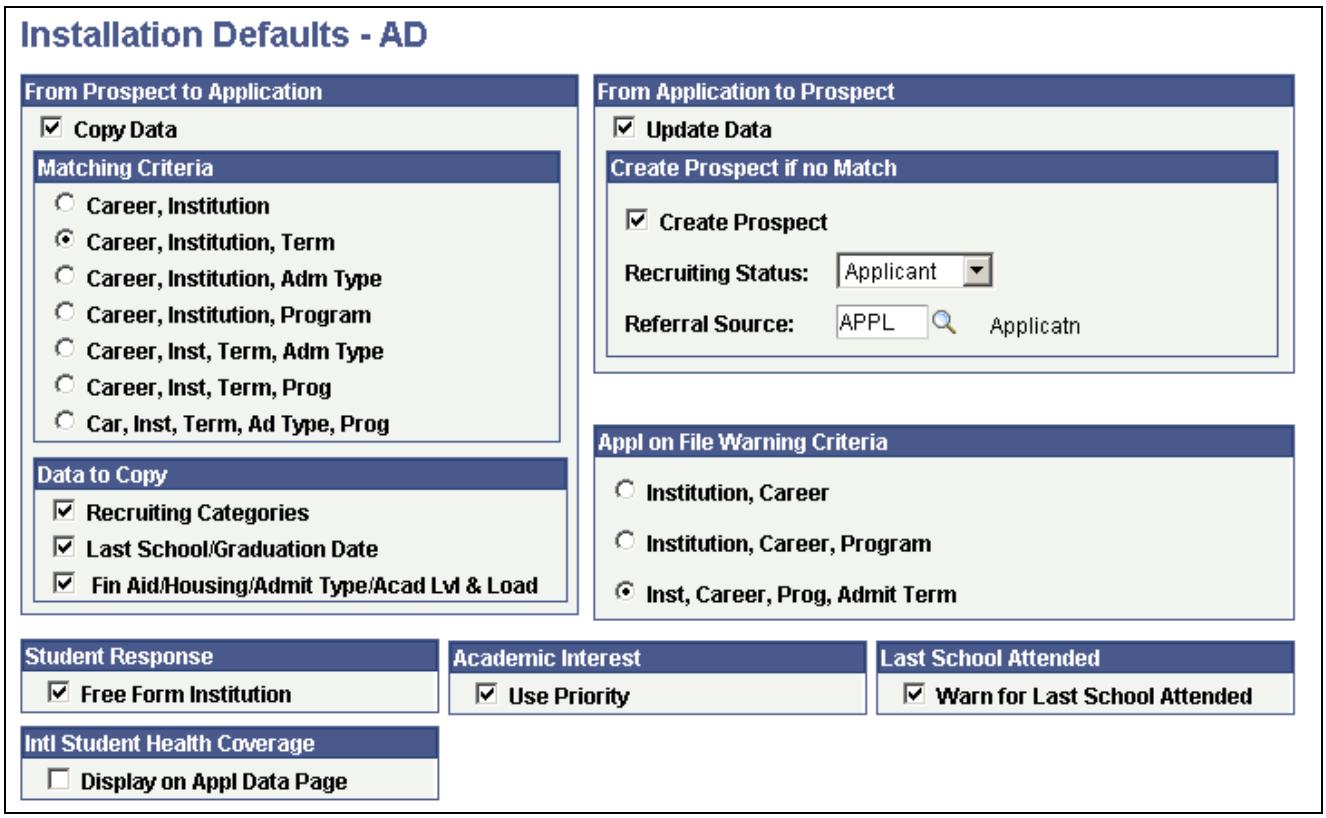
This section discusses how to set up admission installation defaults.

Page Used to Set Up Admission Installation Defaults

Page Name	Object Name	Navigation	Usage
Installation Defaults - AD	INSTALLATION_AD	Set Up SACR, Install, Admissions Installation	Set up defaults, such as for copying information between application and prospect records. For example, when you add an application record, and a prospect record exists for that applicant, you might want to copy some of the information from the prospect record to the application record.

Setting Up Admission Installation Defaults

Access the Installation Defaults - AD page.



Installation Defaults - AD page

Note. You must exit and reenter the application for installation defaults to take effect.

From Prospect to Application

Copy Data Select this check box if you want prospect information copied to the application record. Clear this check box if you don't want prospect information copied to a new application.

Matching Criteria

If you selected the Copy Data check box, choose the criteria that the system uses to update an application with prospect information. Choose which data elements in your user defaults must match those of the prospect record. When you add a new application, the system compares your user defaults to the criteria that you select here. For example, if you select *Career, Institution,* and *Admit Type,* the system compares the prospect's career, institution, and admit type to your user defaults. If it finds a match, the system copies the prospect data into the new application. You must have defined user defaults for this functionality to work.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Setting User Defaults".

Data to Copy

If you selected the Copy Data check box, specify those data categories that you want carried to the application from the prospect record. You can choose one or more of the following three categories:

- Recruiting categories.
- Last school attended and graduation date.
- Financial aid, housing, admit type, and academic level and load.

The system updates the application with the selected data at the matching criteria level.

Only those matching recruiting categories with the Move to Application check box selected on the Prospect/School Recruiting page are copied to the application record.

See Chapter 9, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 88.

The preceding information is copied to the application initially, but if you later edit the application, the prospect record doesn't change. Conversely, if you later edit the prospect record, the application doesn't change.

Note. If you do not select the Copy Data check box, the choices under the Matching Criteria and Data to Copy group boxes do not affect anything in the system.

From Application to Prospect

If a prospect submits an application, you can update the prospect record with the pertinent application number for the career and program. If the application is for a program that is not included on the prospect record, the system adds the new program information to the existing prospect record, including the career and program to which the application pertains.

Update Data When you receive an application from an applicant with an existing prospect record, select this check box to copy the application number into the prospect record. The application number appears on the Prospect Program Data page in the Create/Update Prospects component. On the Prospect Career Data page in the Create/Update Prospects component, the Applied field is selected. Also, on the Prospect School/Recruiting page, the Last School Attended, Graduation Date, and Region fields are populated if they had no data in them on the prospect record.

Note. If the prospect record does not include the program being applied to, the system adds that program to the prospect record and updates it with the application information.

Create Prospect if no Match

You can receive applications from people for whom you have no existing prospect records. For historical purposes, you might want to have a prospect record for all applications stored in your system. The Student Administration system enables you to create prospect records retroactively for all such applications.

Create Prospect Select this check box to create a retroactive prospect record for an applicant. You must have selected the Update Data check box. When you save the new application, the system automatically creates a prospect record. The new record contains the following data from the application: admit term, admit type, campus, academic level, academic load, academic program, academic plan and sub-plan, recruiting status, application number, status date, last school attended, graduation date and region. Recruiting center comes from your user defaults. Additionally, the application number appears on the Prospect Program Data page in the Create/Update Prospects component, and the Applied field is selected on the Prospect Career Data page in the

Create/Update Prospects component. The system only creates a prospect if a recruiting center is defined in your user defaults.

Recruiting Status and **Referral Source** — If you selected the Create Prospect check box, enter a recruiting status and a referral source on the new prospect record. Recruiting status values are delivered with your system as translate values. You can modify these translate values. Define referral sources on the Referral Source Table page.

Appl on File Warning Criteria

Avoid entering duplicates when adding new applications. You can specify at what level the system warns you that a potential duplicate application exists. For example, when saving an application, you might want the system to notify you that an application with the same institution, career, program, and admit term already exists for the person. Or you might want the system to warn you at a higher level, when only the institution and career match. When the system warning appears, you can either save the application or return to the application page without saving. Select your preference for being warned that a potential duplicate application exists for a person.

Institution, Career — If an application for this person exists with the same institution and career as the application that you are saving, a warning message appears.

Institution, Career, Program — If an application for this person exists with the same institution, career, and programs as the application that you are saving, a warning message appears.

Institution, Career, Program, Admit Term — If an application for this person exists with the same institution, career, program, and admit term as the application that you are saving, a warning message appears.

If the system detects a potential duplicate when you save an application, you get a warning such as the following:

“An application with Career (UGRD), Program (LAU), Admit Term (0450) and Institution (PSUNV) already exists.

If you would like to create a new application with the same Career, Program, Admit Term and Institution click the OK button, otherwise click the Cancel button.”

Student Response

Free Form Institution — Select this check box to allow your users to enter a free-form institution name on the Student Response page and to allow students to enter a free form name on the self-service Accept Admissions page. If you want users to select from a list of external organizations that your institution has, clear this check box.

You can use the Student Response page to capture reasons why a prospect or applicant chose or rejected your institution. This is important information that your institution might want to track and report on. Your institution has the option of allowing end users to enter the free-form name of a school when they capture data on the Student Response page. You might want to enable this option (on the Installation Defaults - AD page) because a student can choose to attend an institution that is not loaded as an external organization in your system.

See Chapter 14, “Adding and Updating Applications,” Updating Applications, page 202.

Academic Interest

Use Priority

Select this check box to enable the Academic Interest Priority feature. To disable the Academic Interest Priority feature for your institution, clear this check box.

The Academic Interest Priority feature enables you to capture and view a prospect's or applicant's academic interest priority ranking level. For example, pre-law could be their first level academic interest priority and technology could be their second level academic interest priority. This feature can help in your enrollment management, recruiting efforts, and reporting program evaluation. If you enable this feature, the Priority field becomes active on the Academic Interests page.

See Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 117.

Last School Attended

Warn for Last School Attended

Select this check box to have the following warning message appear: "Academic history not being updated." The message only appears if you don't enter a value in the Last School Attended field on the Prospect School/Region page or the Application School/Recruiting page or if you enter the last school attended after you add the initial time that you add the person.

This warning message applies to the data entry of both prospects and applicants.

Setting Up Admit Types

To set up admit types, use the Admit Type component (ADMIT_TYPE_TABLE).

This section discusses how to set up admit types.

Page Used to Set Up Admit Types

Page Name	Object Name	Navigation	Usage
Admit Type Table	ADMIT_TYPE_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Admit Type Table	Define your institution's admit type values. You can assign an admit type to prospects and applications to clarify the type of prospect or applicant, such as first year, readmit, or transfer.

Setting Up Admit Types

Access the Admit Type Table page.

Academic Career Select the academic career to which this admit type is related if you want this type available for *only* that career. Do *not* select an academic career if you want this admit type available for *all* careers.

Readmit Processing Required Select this check box if the admit type requires you to admit a person into an existing student record (for example, a person applies to reenter a program they were previously studying at your institution). When this admit type is entered on an application record, the system populates an existing program record rather than create a new record when the person matriculates.

Setting Up Referral Sources

To set up referral sources, use the Referral Source component (REFERL_SRCE_TABLE).

This section discusses how to set up referral sources.

Page Used to Set Up Referral Sources

Page Name	Object Name	Navigation	Usage
Referral Source Table	REFERL_SRCE_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Referral Source Table	Define your referral sources and track how prospects or applicants learned of your institution. A referral source indicates why this person was originally added to your database.

Setting Up Referral Sources

Access the Referral Source Table page.

Entering a referral source for a prospect records the initial contact made with this person. You can record subsequent contacts with a person using the Communications Management pages.

Some individuals enter your database for the first time as an applicant. In such cases, you might want to create a prospect record retroactively to record, among other information, a referral source.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 21

Setting Up School Types

To set up school types, use the Region component School Type component (LS_SCHL_TYPE_TABLE).

This section discusses how to set up school types.

Page Used to Set Up School Types

Page Name	Object Name	Navigation	Usage
School Type Table	LS_SCHL_TYPE_TABLE	Set Up SACR, Common Definitions, External Education, School Type Table	Set up school types and categorize external organization material.

Setting Up School Types

Access the School Type Table page.

School types are another way that the system categorizes external organization material. School organizations are those that you'll probably use the most in PeopleSoft Recruiting and Admissions. Assign school types to an organization on the School Data page in the Organization Table component.

Advisement School Type If this is an advisement school, select an advisement school type. Values for this field are delivered with your system as translate values. You can modify these translate values.

Use Within Student Response When you are defining a school type code, you must also specify whether this school type can be used with the Student Response feature. Select this check box to enable student response reasons when defining a school type on the School Type Table page.

Canadian School Govt Class (Canadian school government class) This field only appears if your system installation country equals *CAN*. In order to report the correct value for the school type, select a Canadian classification value.

Use the values to define the schools type. Valid values are "Elementary", "Post Sec", "Secondary", "University" and "Unknown". Those values are delivered as translate values. You can change them.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 21

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Organization Data"

Setting Up Extracurricular Activities

To set up extracurricular activities, use the Extracurricular Activities component (EXTRA_ACTIVITY_TBL).

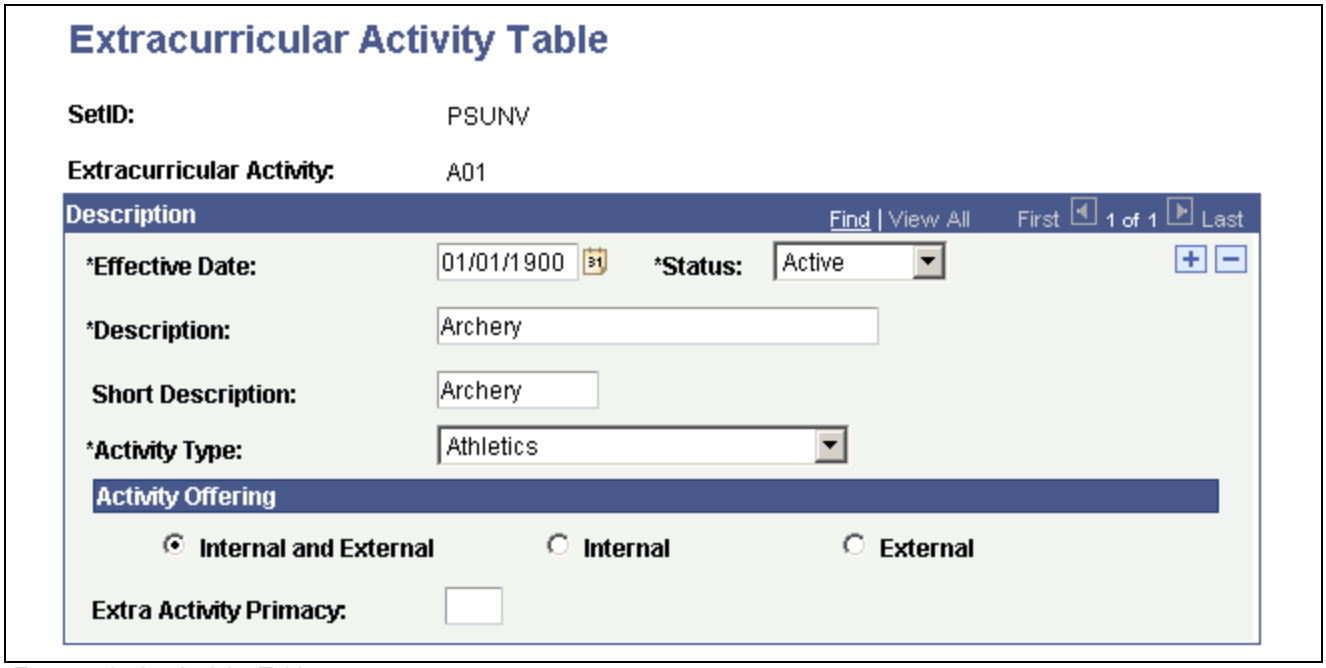
This section discusses how to set up extracurricular activities.

Page Used to Set Up Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Tbl	Define extracurricular activities for tracking, reporting, and recruiting and admission purposes.

Setting Up Extracurricular Activities

Access the Extracurricular Activity Table page.



Extracurricular Activity Table page

Activity Type Select an activity type. Activity type values are delivered with your system as translate values. You can modify these translate values.

Activity Offering

Select an option in the Activity Offering group box to indicate whether the activity is offered by your institution (internal), by an external organization (external), or both.

Internal and External The activity is offered by your institution and by an external organization. These activities are available in PeopleSoft Recruiting and Admissions and PeopleSoft Student Records.

Internal The activity is offered by your institution only. These activities are available only in PeopleSoft Student Records.

External The activity is offered by an external organization only. These activities are available only in PeopleSoft Recruiting and Admissions.

Additional Elements

Extra Activity Primacy Enter the extra activity primacy number for this extracurricular activity. PeopleSoft Student Records typically uses this field for internal extracurricular activities. The Consolidate Academic Statistics process uses these primacy values to determine a student's primary extracurricular activity when a student is active in more than one academic career during an academic statistics period. The system uses this number as a key to determine the student's primary extracurricular activity. The consolidate academic statistics process reports the student's extracurricular activity that has the lowest primacy number.

Setting Up Honors and Awards

To set up honors and awards, use the Honors and Awards component (SA_HONORS_AWARDS).

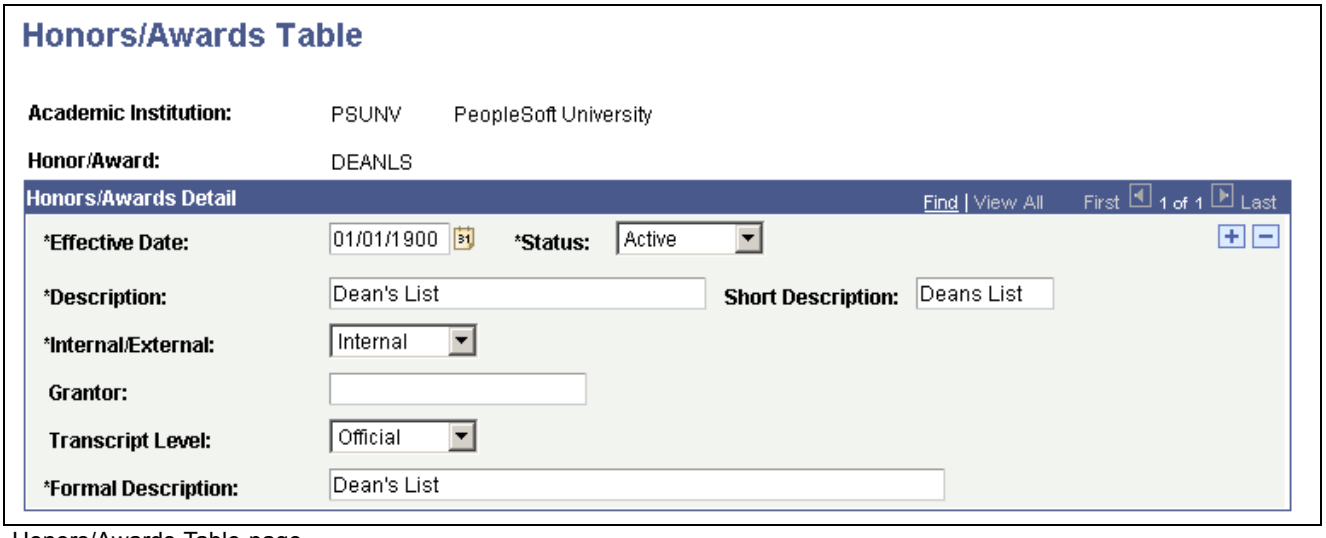
This section discusses how to set up honors and awards.

Page Used to Set Up Honors and Awards

Page Name	Object Name	Navigation	Usage
Honors/Awards Table	SA_HON_AWRD_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Honors and Awards Table	Define internal and external honors and awards.

Setting Up Honors and Awards

Access the Honors/Awards Table page.



Honors/Awards Table page

You can store honors and awards, both internal and external to your institution, for prospects, applicants, and students. You can define codes for honors and awards such as Dean's List, National Merit Finalist, and Valedictorian. Note that these honors are non-degree related. Honors related to a degree are set up in the Degree Honors Table page.

Internal/External Select whether this award or honor is internal or external to your institution.

Grantor Enter a grantor if one is associated with this award.

Transcript Level Select the transcript level for which you want the honor or award to appear: *Degr Prog (degree program), Not Print, Official, Stdnt Life (student life),* or *Unofficial.* This field is only available if the Internal/External field is set to *Internal.*

The transcript level is hierarchical, based on the two position numeric codes in the value column of the translate table. Depending on the transcript level that you select, the system prints the honor or award on that transcript type and all other transcript types occurring below it on the translate table.

For example, if you select *Official* for your transcript level (which has a level value of 20 on the translate table), the system prints the honor or award on all transcript types.

If you select *Stdnt Life* for your transcript level (which has a level value of 60 on the translate table), the system prints the honor or award only on student life transcripts (level 60) and PeopleSoft Academic Advisement degree progress transcripts (level 80). The following table shows the hierarchy of these transcript level values.

Value	Translate Table Values Long Name for TRANSCRIPT_LEVEL Field
00	Never Print
20	Print on Official
40	Print on Unofficial
60	Print on Student Life
80	Print on Degree Programs

Formal Description Enter a formal description of this honor or award. The formal description is printed on the transcript if you have specified that this award should be printed.

Setting Up Student Groups

To set up student groups, use the Student Group component (STDNT_GROUP_TABLE).

This section discusses how to set up student groups.

Page Used to Set Up Student Groups

Page Name	Object Name	Navigation	Usage
Student Group Table	STDNT_GROUP_TABLE	Set Up SACR, Product Related, Student Records, Student Standing and Awards, Student Group Table	Define student groups and track particular groups to which a prospect or applicant belongs. This data supports application information. You can define any groups that you want to record for a prospect, applicant, or student. Student groups are also used in PeopleSoft Student Records.

Setting Up External Summary Types

To set up external summary types, use the Region component External Summary Type component (EXT_SUMM_TYPE_TBL).

This section discusses how to set up external summary types.

Page Used to Set Up External Summary Types

Page Name	Object Name	Navigation	Usage
External Summary Type Table	EXT_SUMM_TYPE_TBL	Set Up SACR, Common Definitions, External Education, External Summary Type Table	Define the types of summary education information that you want to capture from a prospect or applicant. For example, you might define external summary types that mirror academic levels on a transcript, such as High School Grade 9, High School Overall, Undergraduate Third Year, and Post-Baccalaureate Overall.

Setting Up External GPA Tables

To set up external GPA tables, use the External GPA Type component (GPA_TYPE_TABLE) and the External GPA Rules component (GPA_RULES_TBL).

This section discusses how to:

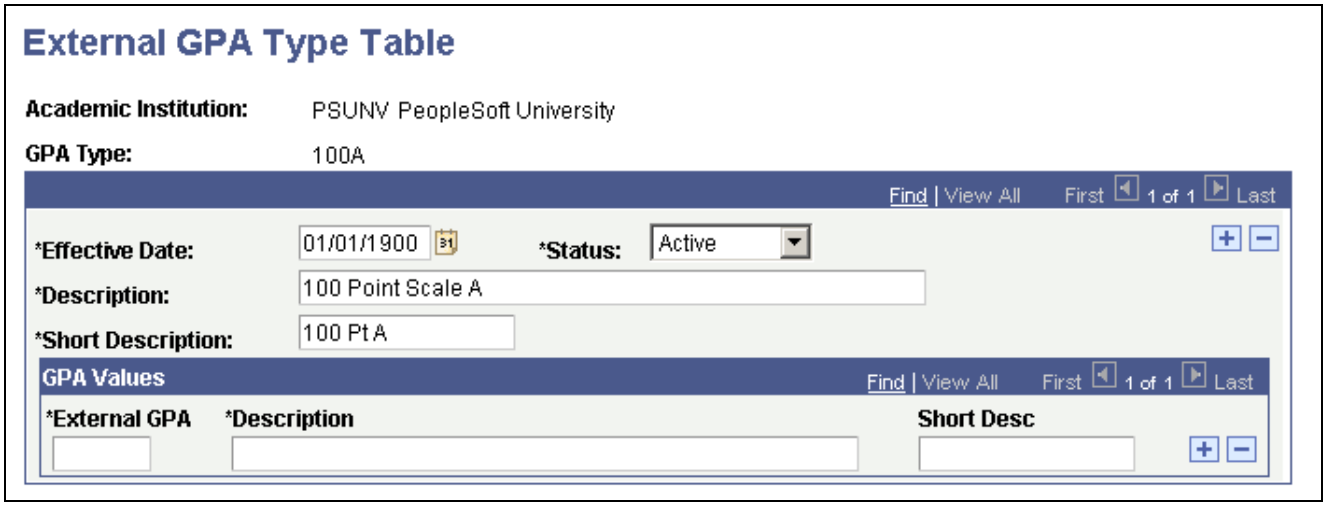
- Define external GPA type codes.
- Set up external GPA conversion rules.

Pages Used to Set Up External GPA Tables

Page Name	Object Name	Navigation	Usage
GPA Type Table	GPA_TYPE_TABLE	Setup SACR, Common Definitions, External Education, External GPA Type Table	Set up grade point average types for external organizations.
GPA Rules Table	GPA_RULES_TABLE	Setup SACR, Common Definitions, External Education, External GPA Rules Table	Define your GPA conversion rules.

Defining External GPA Type Codes

Access the External GPA Type Table page.



External GPA Type Table page

Defining the External GPAs

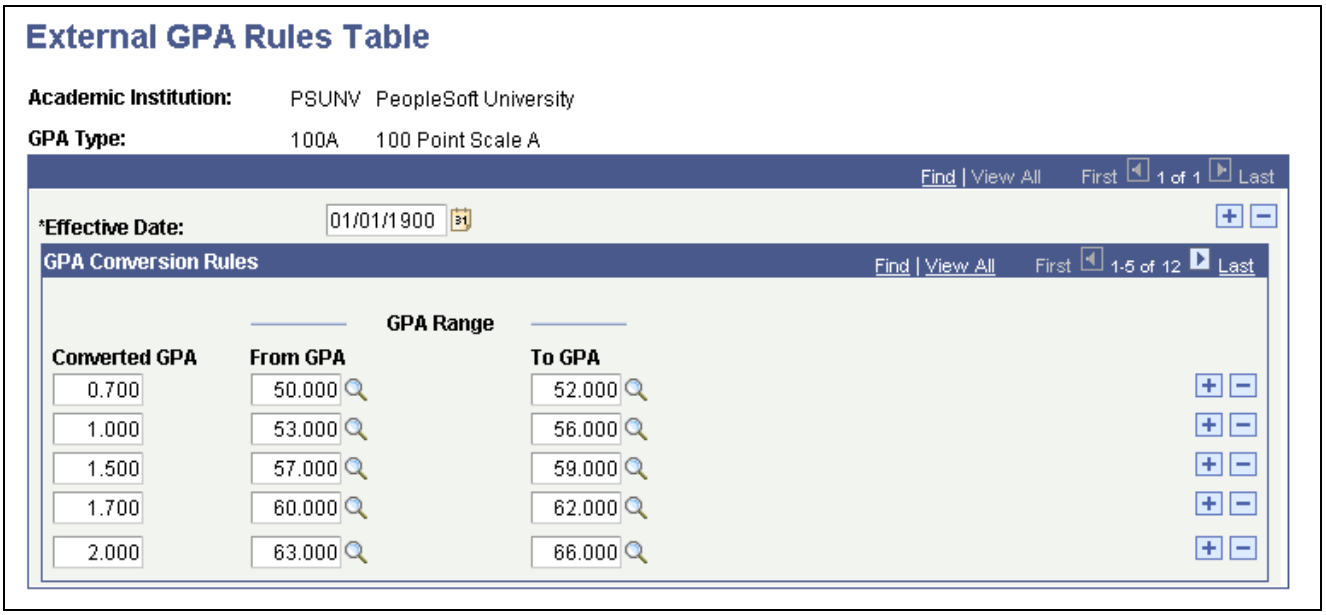
If the outside GPA type has a name that is not descriptive or self-evident, you can use the GPA values portion of this page to more clearly define the external GPAs that belong to this GPA type. You do not need to fill in External GPA and Description fields if it is clear from the GPA type name exactly what it means.

External GPA Enter the external GPA value for each GPA value.

Short Description Enter a short description—up to 15 characters—for each GPA value.

Setting up GPA Conversion Rules for GPA Types

Access the External GPA Rules Table page.



External GPA Rules Table page

Effective Date Enter an effective date for this GPA rule. If the effective date is equal to or greater than the effective date for this GPA type, then this GPA rule is active.

Converted GPA Enter the converted GPA that applies to the range entered in the From GPA and To GPA fields.

From GPA and **To GPA** You can enter any numeric value in these fields. If you defined GPA values (on the GPA Type Table page) for this GPA type, you can prompt for those values, but you are still free to enter values that are not defined. You can add as many converted GPAs as needed for a GPA type.

Reviewing Material Types and Defining Material Groups

To set up material groups, use the Material Type component (MATERIAL_TYPES) and the Material Group component (MATL_GRP_TYP_TBL).

Your system is delivered with predefined material types. Material types are pieces of information that you require for an application, such as letters of recommendation, transcripts, and so on. Group these types according to your office's needs.

This section discusses how to:

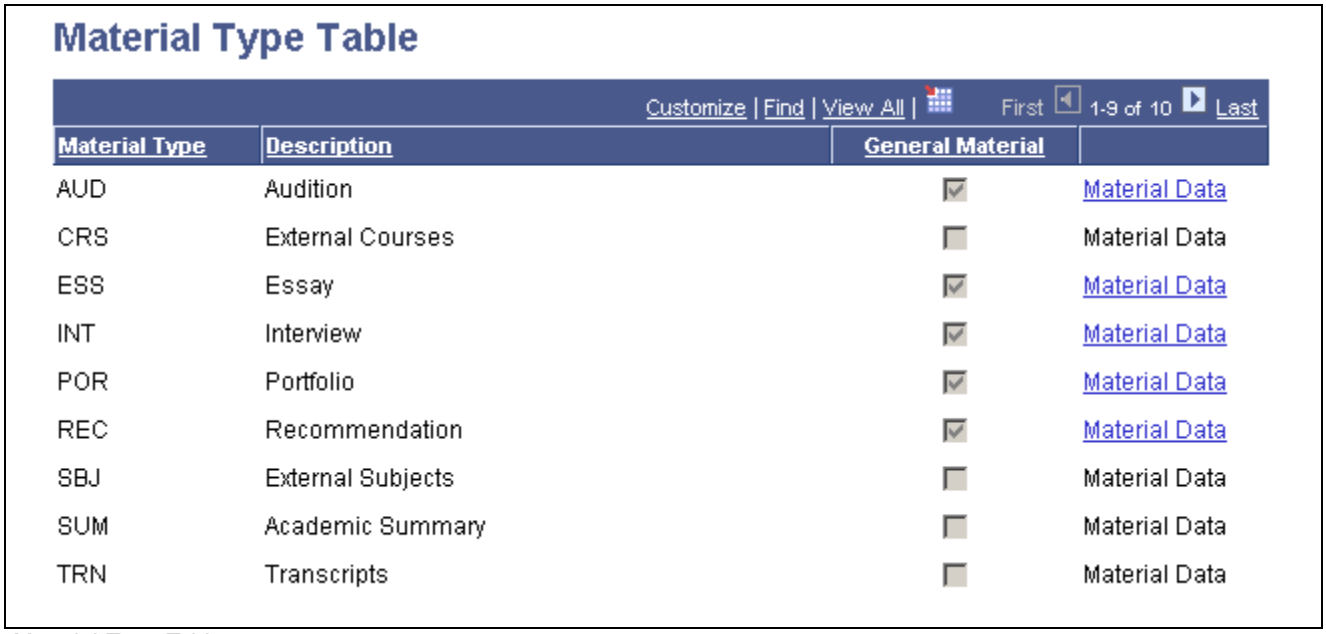
- View material types.
- Set up material groups.

Pages Used to Review Material Types and Define Material Group

Page Name	Object Name	Navigation	Usage
Material Type Table	MATL_TYPE_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Material Type Table	View material types and their material data.
Material Type Field Usage	MATL_TYPE_SP	Click the Material Data link on the Material Type Table page to view the Material Type Field Usage page.	Review additional material data content.
Material Group Table	MATL_GRP_TYP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Material Group Table	Define material types into groups. For example, you can have one group of materials for undergraduate auditions, one for graduate test scores, one for medical external courses, and so on.

Viewing Material Types

Access the Material Type Table page.



Material Type Table page

The information on this page includes auditions, transcripts, external course work, letters of recommendation and more. PeopleSoft Recruiting and Admissions refers to all of this supporting application information as *material types*.

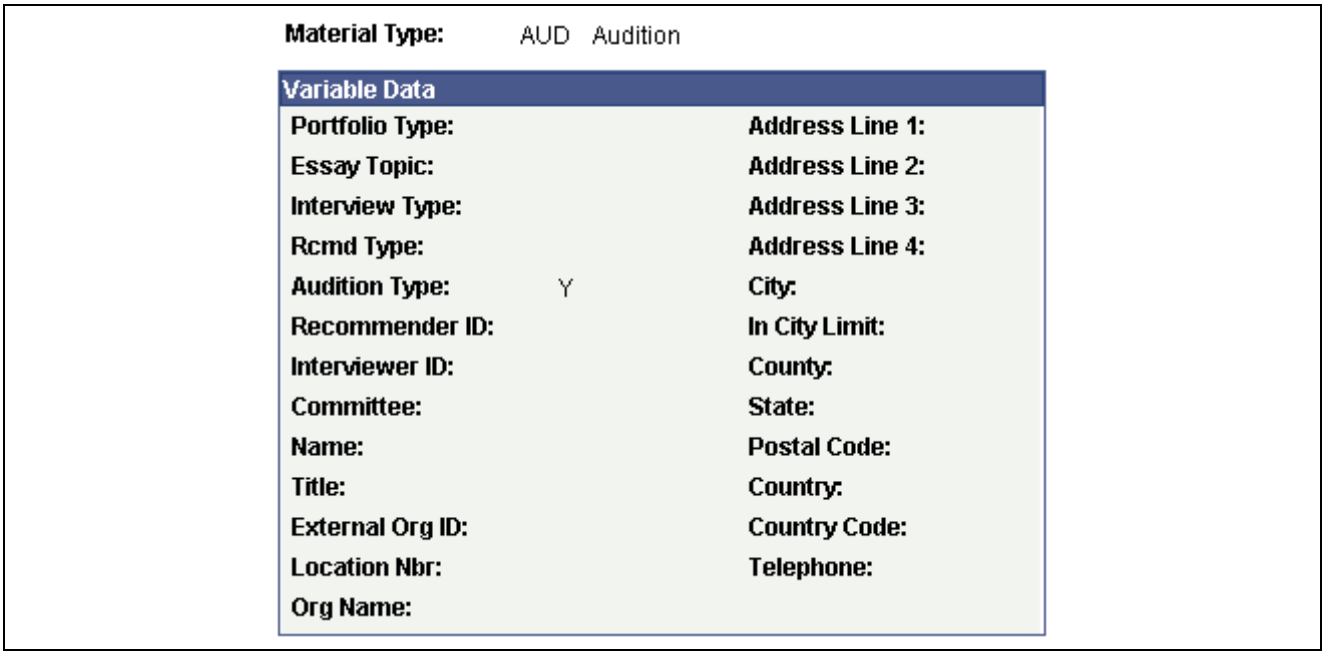
General Material Material types that are designated as general materials—the check box is selected—appear as a material type on the General Materials page. When you enter general materials for a prospect or applicant, you can choose only those designated material types.

Material types that are not indicated as general materials—the check box is cleared—appear on the Application Materials page.

Material Data Click this link to display the Material Type Field Usage page. This page is for informational purposes only. All items marked with a *Y* or a *1* on the Material Type Field Usage page are available to add to an application record on the General Materials page. For example, the Recommendation material type contains a *Y* for city, but nothing for essay topic. Thus, on the General Materials page you can enter a city for the prospect but not an essay topic.

Using the Material Type Field Usage Page

Access the Material Type Field Usage page



Material Type Field Usage page

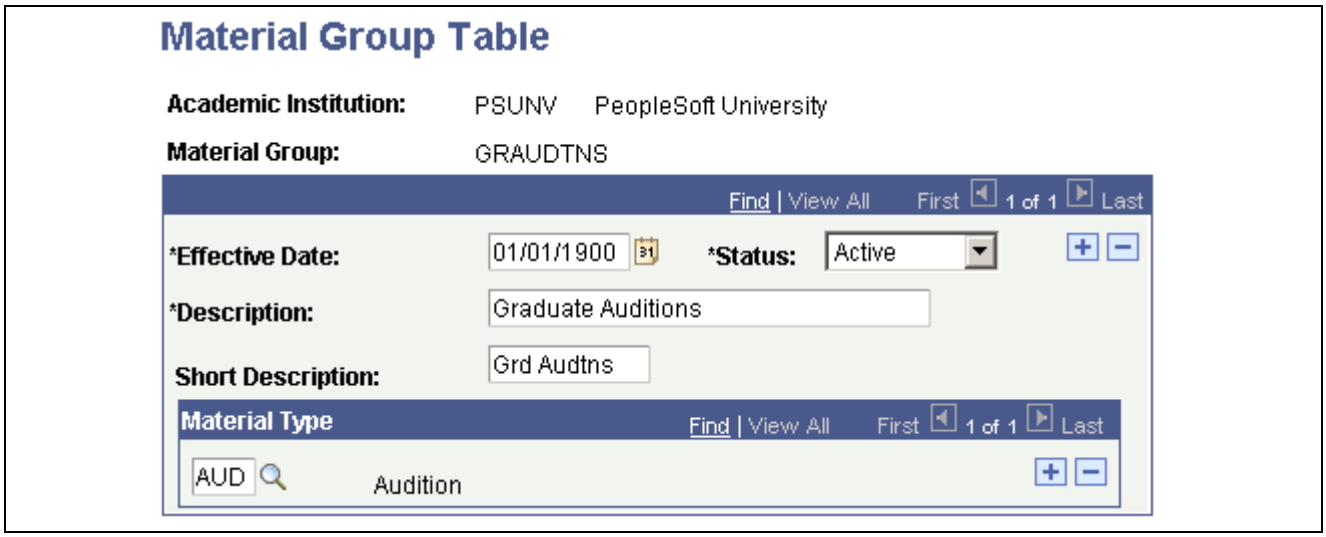
If the General Material check box is cleared on the Material Type Table page, then that material type is stored elsewhere for each person and then linked to actual applications on the Application Materials page. For example, test scores (not a general material type) are linked to a person's ID on the Test Results page. Specific test scores for that person can then be linked to an application. The material type values provided with PeopleSoft Recruiting and Admissions are the following:

Material Type Values	General Material?
AUD - Audition	Y
CRS - External Courses	N
ESS - Essay	Y
INT - Interview	Y

Material Type Values	General Material?
POR - Portfolio	Y
REC - Recommendation	Y
SBJ - External Subjects	N
SUM - Academic Summary	N
TRN - Transcripts	N
TST - Test Scores	N

Setting Up Material Groups

Access the Material Group Table page.



Material Group Table page

Material Type Select the material types that you want in this group. A material group can consist of one or more material types. For example, you can define a group called Undergraduate Recommendations and assign the material type *Recommendation.* You can define another group called Undergraduate Portfolios and include the material types *Interview* and *Portfolio.* Also, a material type can be assigned to as many material groups as needed.

Note. You can define as many material groups as necessary and you can choose from all material types. You can include general and specific material types in the same group. We suggest that your institution plan and name material groups to logically fit your application material requirements. For example, if you create a material group called Graduate Tests, link only pertinent material types to this group. It's unlikely that you would include the material type *Recommendation* within that material group.

CHAPTER 4

Setting Up Self-Service Request Information and Using Self-Service Student Recruiting

The chapter provides an overview of self-service request information, how to set up self-service request information, and discusses using self-service student recruiting.

Understanding Self-Service Request Information

PeopleSoft Campus Solutions and PeopleSoft Campus Solutions offer self-service applications that are licensed separately. If you have licensed Campus Self-Service, you can use the self-service pages described here.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Understanding Campus Self Service".

This section lists prerequisites and discusses self-service request information.

Prerequisites

Before you can set up your parameters for the Request Information transaction, you must set up a communications infrastructure in PeopleSoft Enterprise Campus Community. The required steps for setting up communications for the Request Information transaction include defining communication keys and event IDs. All communications for the Request Information transaction must be defined using the administrative function *PSSV*. You define communication keys on the Communication Speed Key Table page.

Note. To access the Communication Speed Key Table page, you must enter an administrative function. Enter *PSSV* (prospect self-service).

After you define communication speed keys, you must define event IDs. You define event IDs on the Event Definition page. Event IDs contain the communication keys that you set up previously. You select event IDs on the Web Prospect Setup 2 page. Event IDs contain the specific communications that the prospect can choose from or automatically receive depending on your setup.

Note. To access the Event Definition page, you must enter an administrative function. Enter *PSSV*.

The Web Prospect Setup 2 page also enables you to control whether visitors can choose from a selection of communications, depending upon the career of interest, or whether they are sent a default communication. If you decide to let prospects select from a list of communications, you can define the available choices.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Communications," Defining Communication Speed Keys

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Using the 3C Engine," Defining 3C Engine Events

Requesting Self-Service Information

The PeopleSoft Learner Services self-service application enables you to capture prospect data over the web. When visitors to your website request admissions information, they can enter information about themselves that the system converts to prospect data. For example, they can enter academic interests, test scores, academic program information, and more. The system takes this information and creates a prospect record. To request admissions information, a visitor must have a user ID and password. This is accomplished through the New User Registration process. After a visitor obtains a user ID, he or she becomes a person in your database (the system assigns the person an ID and creates a biographic and demographic data record for the person).

Note. New User Registration functionality is currently not delivered. Check with your customer representative for the availability date.

After a person obtains a user ID and password, he or she has access to the Request Information feature. However, before submitting the request for information, the system prompts the visitor for information based on your setup options. The visitor enters the academic career in which he or she is interested, plus the academic institution (if your institution is a part of a multi-institution system). You can decide what other prospect data you want to collect. You can collect academic information, such as admit term, admit type, campus, academic level, academic load, housing interest, and financial aid interest; and school information, such as last school attended and graduation date. The information that the prospect enters depends on your setup. Some pages and fields appear and hide depending on the information that you want from prospects. For example, the Academic Interests and Test Results self-service pages are only available if you select those segments on the Web Prospect Setup page.

After the visitor enters the information and submits the request, the system creates a prospect record. You can view the new prospect record in the Prospect Data component. If you choose to collect academic interest information, and the visitor chooses to enter this information, you can view the data in the Academic Interests component. If you choose to collect test score data, and the visitor chooses to enter this information, you can view the data in the Test Scores component. The system also updates the Communication Management component for the person according to your setup and the prospect's response. If a prospect record for that person already exists, the system updates the admit term, admit type, last school attended, graduation date, academic program, and academic plan (assuming that you chose to collect this data and that the visitor entered it).

You can edit the text messages on the Request Information self-service pages. These messages are in the message catalog under the message set number 14230. Changing these messages is considered a modification to your software.

Note. PeopleSoft Enterprise Campus Solutions offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Enterprise Campus Self-Service application you can use the self-service pages described here.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Understanding Campus Self Service".

Setting Up Self-Service Request Information

To set up self-service request information, use the Web Prospect Create component (ADM_WEB_PRS_SETUP).

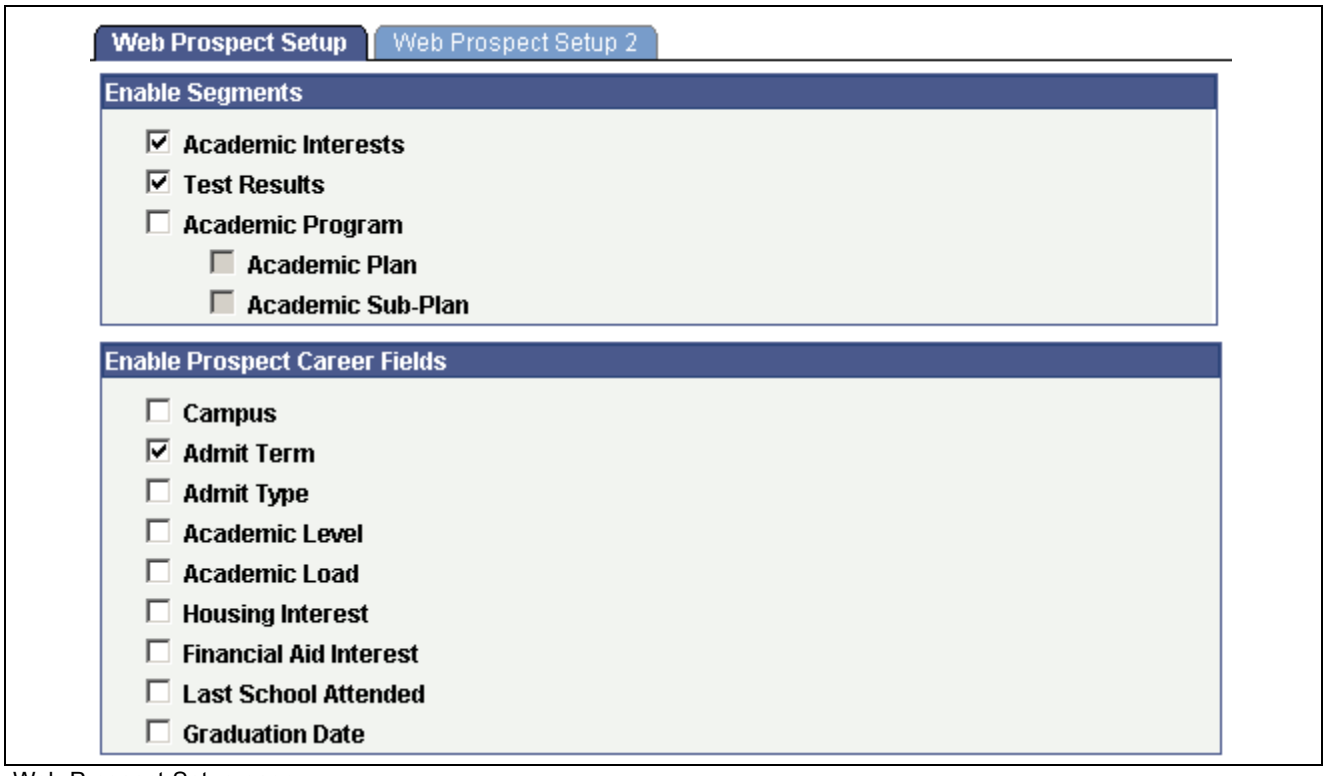
Use the Web Prospect Create Table component to determine which information segments you want to enable in the Request Information self-service transaction and to set up academic institution and career parameters (such as which careers you want available to the visitor, and which recruiting center you want assigned to that career).

Pages Used to Set Up Self-Service Request Information

Page Name	Object Name	Navigation	Usage
Web Prospect Setup	ADM_WEB_PRS_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table	Enable or disable Request Information self-service transaction segments and prospect career fields.
Web Prospect Setup 2	ADM_WEB_PRS2_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table, Web Prospect Setup 2	Define institution and career setup parameters for the Request Information self-service transaction. The academic institutions and careers that you select on this page appear as choices on the Request Information detail page.

Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page.



Web Prospect Setup page

By selecting the check boxes on this page, you enable a segment or field to appear on the self-service Request Information transaction. This enables you to choose what kind of information you collect from prospects who request admissions information. The selections that you make here apply to every academic institution in your system. Therefore, in a multi-institution system, each institution should agree on how to complete this page.

Enable Segments

If you select the Academic Interests or the Test Results check boxes, the respective pages appear in the Request Information self-service transaction. Visitors requesting admissions information have the option of entering academic interest and test result information, which the system then stores in the Academic Interest and Test Scores components.

If you select the Academic Program, Academic Plan, and Academic Sub-Plan check boxes, corresponding fields appear on the Request Information detail page. Visitors can use these fields to enter the program, plan, and subplan that interests them. The system stores this information on the Create/Update Prospects - Prospect Program Data page.

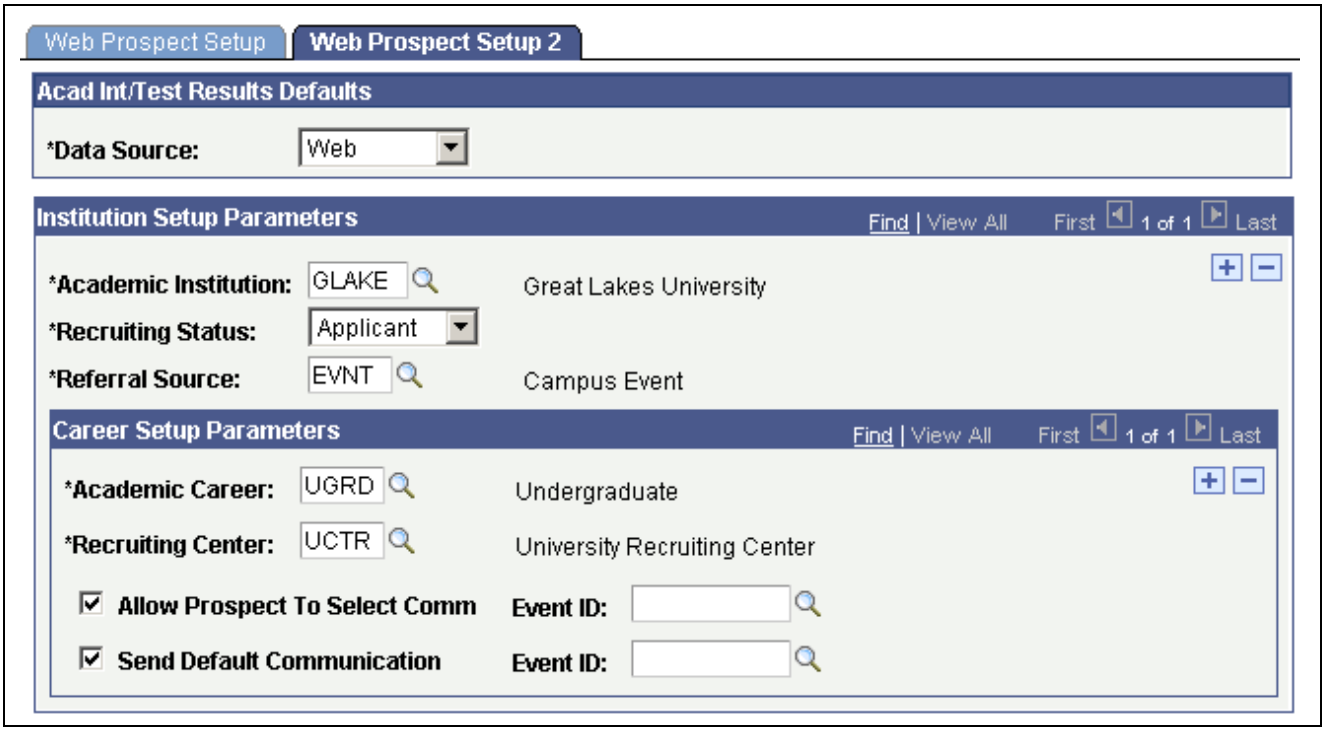
Enable Prospect Career Fields

Each check box in this group box corresponds to a field on the Request Information detail page. Select the check boxes of the information that you want to collect from visitors who are requesting admissions information. Each item in this group box corresponds to an item in the Create/Update Prospects component. Thus, by selecting these check boxes, you can populate additional fields in the Create/Update Prospects component (assuming that the visitor enters the information).

Note. Clearing a check box in this group box hides its corresponding field on the Request Information detail page. For example, if you clear the Academic Level check box, visitors to your website do not see the Academic Level field on the Request Information detail page.

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page.



Web Prospect Setup 2 page

Acad Int/Test Results Defaults

Data Source *Web* is the default. You can change this value. The data source posts to the Academic Interests and Test Results pages.

Institution Setup Parameters

Academic Institution Select the academic institution that you want available to the visitor. If you enter more than one academic institution, visitors can select the academic institution that they are interested in on the Request Information detail page. The system uses the academic institution that the visitor selects to create the prospect record. If you select only one academic institution, the system hides the Academic Institution field on the Request Information page. In this case, the system uses the one academic institution that you entered here to create the prospect record. You must enter at least one academic institution.

Recruiting Status Select the recruiting status that you want the system to assign to the new prospect record. You can select a different recruiting status for each academic institution. The system assigns the selected recruiting status to new prospect records, based on information collected through the Request Information self-service transaction.

Referral Source Select the referral source for information collected through the Request Information self-service transaction. You can select a different referral source for each academic institution. The referral source that you enter here posts to the Prospect Career Data page.

Career Setup Parameters

Academic Career — Select the academic careers that you want available for the visitor to select. On the Request Information detail page, visitors can select the academic careers that interest them. The system uses the selected academic career to create the prospect record. You must enter at least one academic career.

Recruiting Center — Select the recruiting center that you want the system to assign to the new prospect record. You can select a different recruiting center for each academic career. The system assigns the selected recruiting center to new prospect records, based on information collected through the Request Information self-service transaction.

Allow Prospect to Select Comm (allow prospect to select communication) — Select this check box to enable visitors to select from a list of available communications. If you select this check box, a group box that lists the communication items contained in the event ID that you select appears on the Request Information detail page. Visitors can select which items to receive. For example, the *UGRD Web Prospect* event ID at PSUNV includes communications containing information on financial aid, campus housing, and undergraduate applications. Visitors can choose one or more communications from this list. However, only those events that have the User Selection check box selected on the Event Definition Setup page appear as choices in the Event ID field, next to the Allow Prospect to Select Comm field.

Send Default Communication — Select this check box to send a default communication to all visitors who request admissions information for this particular academic institution and career.

Event ID — Select the event IDs that contain the communications that you want mailed to visitors (for each academic career). Enter an event ID in at least one of the Event ID fields. If both fields are blank, then a visitor could submit a Request Information request and receive a confirmation that the request went through, without receiving any communication. The event ID tells the system which communications to send to the visitor. Define event IDs on the Event page.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Managing Campus Event Planning," Creating an Event.

Using Self-Service Student Recruiting for Recruiting and Admissions

Campus Solutions offer self-service applications that are licensed separately. If you have licensed the Campus Self-Service application, you can use the self-service pages that are described here.

Recruiting officers use Student Recruiting to view prospect and applicant information through self-service pages. They can view the prospects and applicants that are assigned to them by category and region. They can also view prospects and applicants for a specific organization.

Prerequisites

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants that are assigned to them. Assign a recruiter to a prospect on the Prospect School/Recruiting page or through the Process Recruiters pages. Assign a recruiter to an applicant on the Application School/Recruiting page.

Pages Used to Manage Student Recruiting for Recruiting and Admissions

Page Name	Object Name	Navigation	Usage
Prospects by Category - Select Search Criteria	SS_ADM_PRS_REQ_CAT	Self-Service, Student Recruiting, View Prospects by Category	Recruiting officers use this page to search for prospects by category.
Prospects by Category - Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Program Detail link on any one of the prospect search results pages.	Recruiting officers use this page to view program details for a prospect.
Prospects by Organization - Select Search Criteria	SS_ADM_PRS_REQ_ORG	Self-Service, Student Recruiting, View Prospects by Organization	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization - Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization - Select Search Criteria page.	Recruiting officers use the page to view prospect search results.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Prospects by Organization - Search Results page.	Recruiting officers use this page to view the organization's primary address.
Prospects by Region - Select Search Criteria	SS_ADM_PRS_REQ_REG	• Outreach, Recruiting Officer, Home, Recruiting, By Region • Self-Service, Student Recruiting, View Prospects By Region	Recruiting officers use this page to search for prospects by region.
Prospects by Region - Search Results	SS_ADM_PRS_SUM_REG	Click the Search button on the Prospects by Region - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Applicants by Category - Select Search Criteria	SS_ADM_APP_REQ_CAT	• Outreach, Recruiting Officer, Home, Recruiting, By Category • Self-Service, Student Recruiting, View Applicants By Category	Recruiting officers use this page to search for applicants by category.

Page Name	Object Name	Navigation	Usage
Applicants by Category - Search Results	SS_ADM_APP_SUM_CAT	Click the Search button on the Applicants by Category - Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Category - Program Detail	SS_ADM_APPL_PROG_C	Click the Program Detail link on any one of the applicant search results pages.	Recruiting officers use this page to view program details for an applicant.
Applicants by Category - Application Status	SS_ADM_APP_ST_CAT	Click the Application Status link on the Applicants by Category – Program Detail page.	Recruiting officers use this page to view a person's application status.
Applicants by Organization - Select Search Criteria	SS_ADM_APP_REQ_ORG	Self-Service, Student Recruiting, View Prospects by Category, View Applicants By Org	Recruiting officers use this page to search for applicants by organization.
Applicants by Organization - Search Results	SS_ADM_APP_SUM_ORG	Click the Search button on the Applicants by Organization - Select Search Criteria page.	Recruiting officers use this page to view applicant search results.
Applicants by Region - Select Search Criteria	SS_ADM_APP_REQ_REG	Self-Service, Student Recruiting, View Applicants By Region	Recruiting officers use this page to search for applicants by region.
Applicants by Region - Search Results	SS_ADM_APP_SUM_REG	Click the Search button on the Applicants by Region – Select Search Criteria page.	Recruiting officers use this page to view applicant search results.

CHAPTER 5

Setting Up External Test Score Loads

This chapter discusses how to:

- Define external test components.
- Define external tests.
- Define and review external data setup tables.
- Map external test IDs.
- Map external test codes to internal codes.

Note. You must complete these items before you can process external tests.

Defining External Test Components

To set up the external test component, use the Test component (SA_TEST_COMP_TABLE).

Use the Test Component Table page to define the test components (such as verbal, math, analytical, and so on) of external academic tests (such as ACT, GMAT, GRE, and so on). You also use this table to create components of placement and other tests administered internally by your institution. If a component is used in more than one test, it only needs to be defined once. Note that totals are not computed by the system, so if you want to enter and track totals, be sure to define *Total* as one of your test components.

Page Used to Define External Test Components

Page Name	Object Name	Navigation	Usage
Test Component Table	SA_TEST_COMP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Component Table	Define the test components (such as verbal, math, analytical, and so on) of external academic tests (such as ACT, GMAT, GRE, and so on). Also, create components of placement and other tests administered internally by your institution. If a component is used in more than one test, it only needs to be defined once. Note that totals are not computed by the system, so if you want to enter and track totals, be sure to define *Total* as one of your test components.

Defining External Tests

To define external tests, use the Test Tables component (SA_TEST_TABLE).

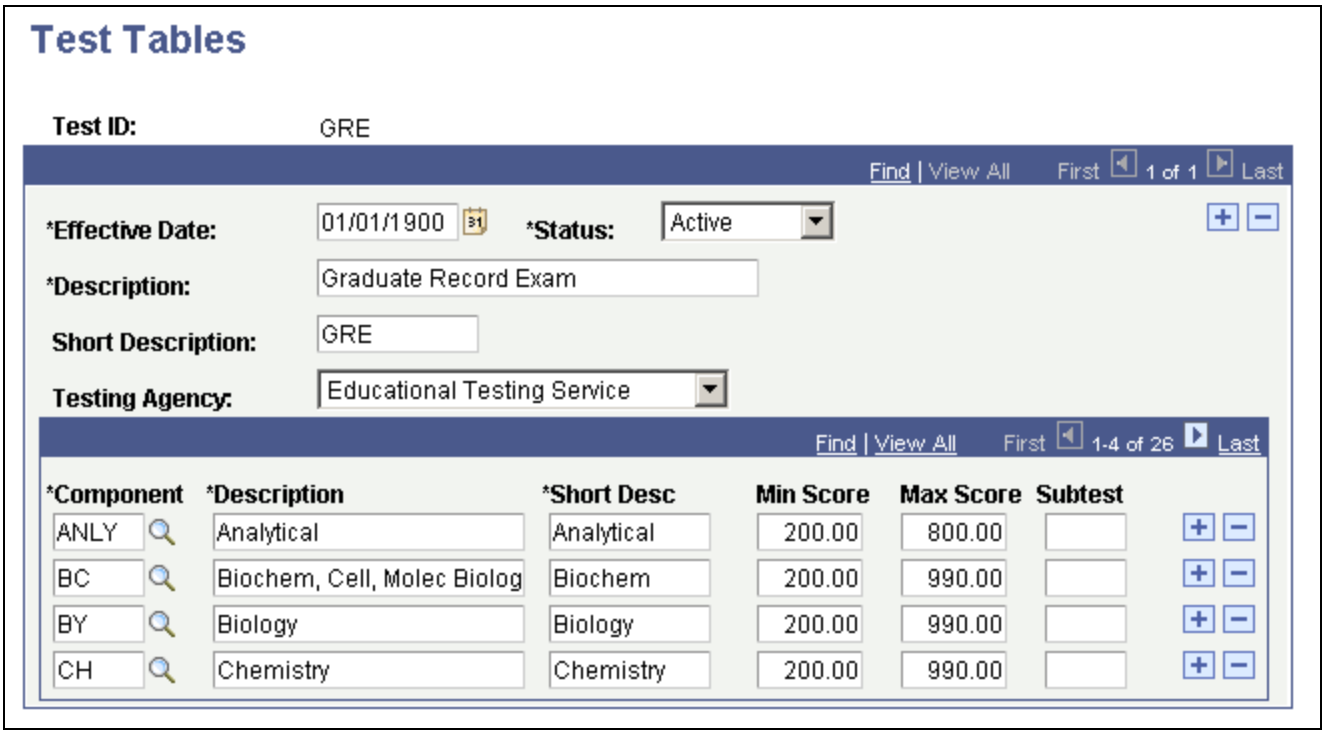
This section discusses how to define external tests (such as ACT, GMAT, GRE, and so on) and how to associate test components with the appropriate tests.

Page Used to Define External Tests

Page Name	Object Name	Navigation	Usage
Test Tables	SA_TEST_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables	Define tests (such as ACT, GMAT, GRE, and so on) and associate test components with the appropriate tests. You can also associate tests on this page with a particular testing agency, such as American College Testing, College Board, Educational Testing Services and Law School Admission Services.

Defining External Tests

Access the Test Tables page.



Test Tables page

Testing Agency Select the testing agency that administers this test (if applicable). This field is for informational purposes only. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *American College Testing, College Board, Educational Testing Services,* and *Law School Admission Services.*

Component Select the test components that you want to link to this academic test. The system populates the descriptions based on the code that you select. Define test components on the Test Component Table page.

Min Score/Max Score (minimum score/maximum score) Enter a test score range for each component.

Subtest Enter the code used for TS130 or TS189 processing of test scores.

Defining and Reviewing External Data Setup Tables

To define external data setup tables, use the AP Subject Test Codes component (AP_SUBJECT_CODES), ADA Country Codes component (ADA_COUNTRY_TBL), GRE Subject Test Codes component (GRE_SUBJECT_CODES), AMCAS Credit Hour Codes component (AMCAS_CR_HR_CODE), AMCAS GPA Codes component (AMCAS_GPA_CODE), SAT Math Recentered Values component (SAT_MATH_RECENTER), SAT Verbal Recentered Values component (SAT_VERBAL_RECENTR), SAT II Test Codes component (SATII_TEST_CODES), SAT II Test Recentered Values component (SATII_TST_RECENTER), Ethnicity Mapping component (SAD_ETHNIC_MAP), and the GMAT Country codes component (SAD_GMT_CNTRY_TBL). Use the CRS_MAJOR_CODE component interface to load the data into the tables from these component interfaces.

PeopleSoft Recruiting and Admissions delivers AP, GRE and SAT test codes, CRS major codes, MCAT credit hours, GPA codes, and SAT recentered values. These codes and values are used in external data processing.

You can edit the delivered descriptions, but we recommend that the descriptions retain their original meaning to avoid confusion when viewing the loaded test data.

Pages Used to Review External Data Setup Tables

Page Name	Object Name	Navigation	Usage
AP Subject Test Codes	AP_SUBJECT_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AP Subject Test Codes	Define or review the delivered AP subject test codes or to add or edit a code. This table stores the test codes used on the AP test. You can link your own codes and descriptions to these codes so that the system displays your codes after the scores are posted. Use the AP Subject Test Code Parameters page to link your codes to the delivered codes.
ADA Country Table	ADA_COUNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, ADA Country Codes	Define or review the AADAS country code. Before processing the ADA external test score load, use the Country field to map AADAS country codes used on the ADA to PeopleSoft country codes.
CRS Major Codes	CRS_MJR_CD_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, CRS Major Codes	Review the delivered CRS major codes or add or edit a code.
GRE Subject Test Codes	GRE_SUBJECT_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, GRE Subject Test Codes	Define or review the delivered GRE subject test codes or add or edit a code. You can link your own codes and descriptions to these so that the system displays your codes after the scores are posted. This linking is done on the GRE Subject Test Code Parameters page.

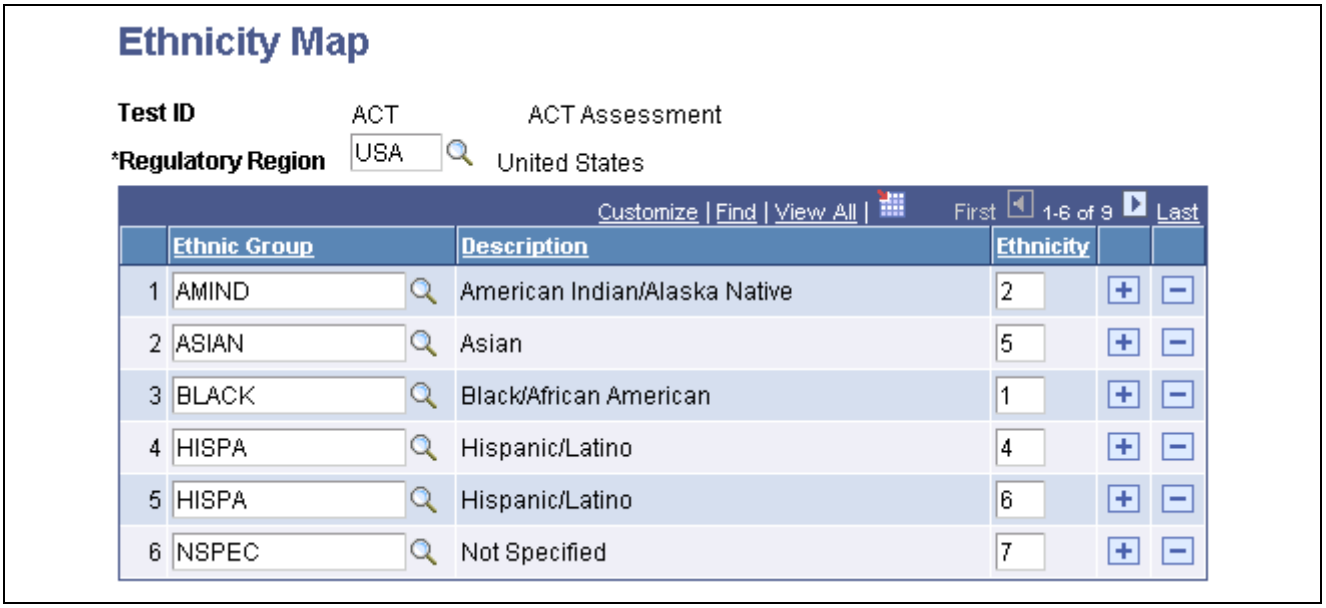
Page Name	Object Name	Navigation	Usage
AMCAS Credit Hours Codes	AMCAS_CR_HR_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Credit Hour Codes	Define or review the delivered AMCAS credit hours codes or add or edit a code. An AMCAS file only includes the actual number of credit hours, so this table includes the codes and descriptions that are mapped to the AMCAS credit hour types.
AMCAS GPA Codes	AMCAS_GPA_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS GPA Codes	Define and review the delivered AMCAS GPA codes or add or edit a code. An AMCAS file only includes the actual GPA, so this table includes the codes and descriptions that are mapped to the GPA.
SAT Math Recentered Values	SAT_MATH_RECENTER	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Math Recentered Values	Review or edit the recentered SAT math score values. When you process SAT math scores, the system recenters some of the scores (as indicated by the SAT load) according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score it receives from the testing agency in the Math Score field. The translated score appears in the Recentered Math Score field. This is the score that the reported score is translated to.

Page Name	Object Name	Navigation	Usage
SAT Verbal Recentered Values	SAT_VERBAL_RECENTR	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Verbal Recentered Values	Review or edit the recentered SAT verbal score values. When you process SAT verbal scores, the system recenters some of the scores according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score it receives from the testing agency in the Verbal Score field. The score displayed in the Recentered Verbal Score field is what the reported score is translated to when processed.
SAT II Test Codes	SATII_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT II Test Codes	Review the delivered SAT II test codes or add or edit a code. You can link your own codes and descriptions to the codes you received in an SAT II tape or file so that your codes are displayed on your Admissions pages.
SAT II Test Recentered Values	SATII_TST_RECENTER	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT II Test Recentered Values	Review or edit the recentered test score values for each SAT II test code. When you process SAT II scores, the system recenters the scores according to the values in this table. Only the recentered scores post to the person's record. The left column lists the SAT II test scores received from the testing agency. The right column lists the recentered test scores, which are what the reported score is translated to when processed.

Page Name	Object Name	Navigation	Usage
Ethnicity Map	SAD_ETHNICITY_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Ethnicity Mapping	Map the ethnicity codes provided by testing agencies to the corresponding PeopleSoft codes if you want to capture ethnicity information when creating prospects from test score loads. Only set up this page if you want to capture ethnicity information when creating prospects from test loads.
GMAT Country Codes	SAD_GMT_CNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, GMAT Country Codes	Define or review the mapping of GMAT Country Codes to PS Country Codes. Before processing the GMAT external test score load, use the Country field to map GMAT country codes to PeopleSoft country codes.

Mapping Ethnicity Codes

Access the Ethnicity Map page.



Ethnicity Map page

Ethnic Group Select the ethnic group code that corresponds to the testing agency code. Ethnicity group codes are defined on the Ethnicity Group Table page.

Ethnicity Enter the ethnicity code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.

Mapping External Tests IDs

To map external test IDs, use the External Test Score Mapping component (SAD_TEST_SETUP).

This section provides an overview and discusses how to map external test score IDs to PeopleSoft test codes.

Understanding External Test ID Mapping

PeopleSoft uses the External Test Score Mapping page to perform a variety of external test related functions.

PeopleSoft needs to know which test IDs from your institution correspond to the PeopleSoft test codes in order to know which fields to display on the external test score components. For example, when you enter the External Test Score Load page and select a test ID, the page dynamically displays based on the test ID entered.

In addition, when you create a query in PeopleSoft Query Manager to create prospects from test loads, the query must contain the primary candidate data record for the test. To determine which is the primary data record, go to the External Test Score Mapping page, where the primary candidate data record is indicated. Also, the records listed under Suspense Records are used in the External Test Score Purge process.

See Also

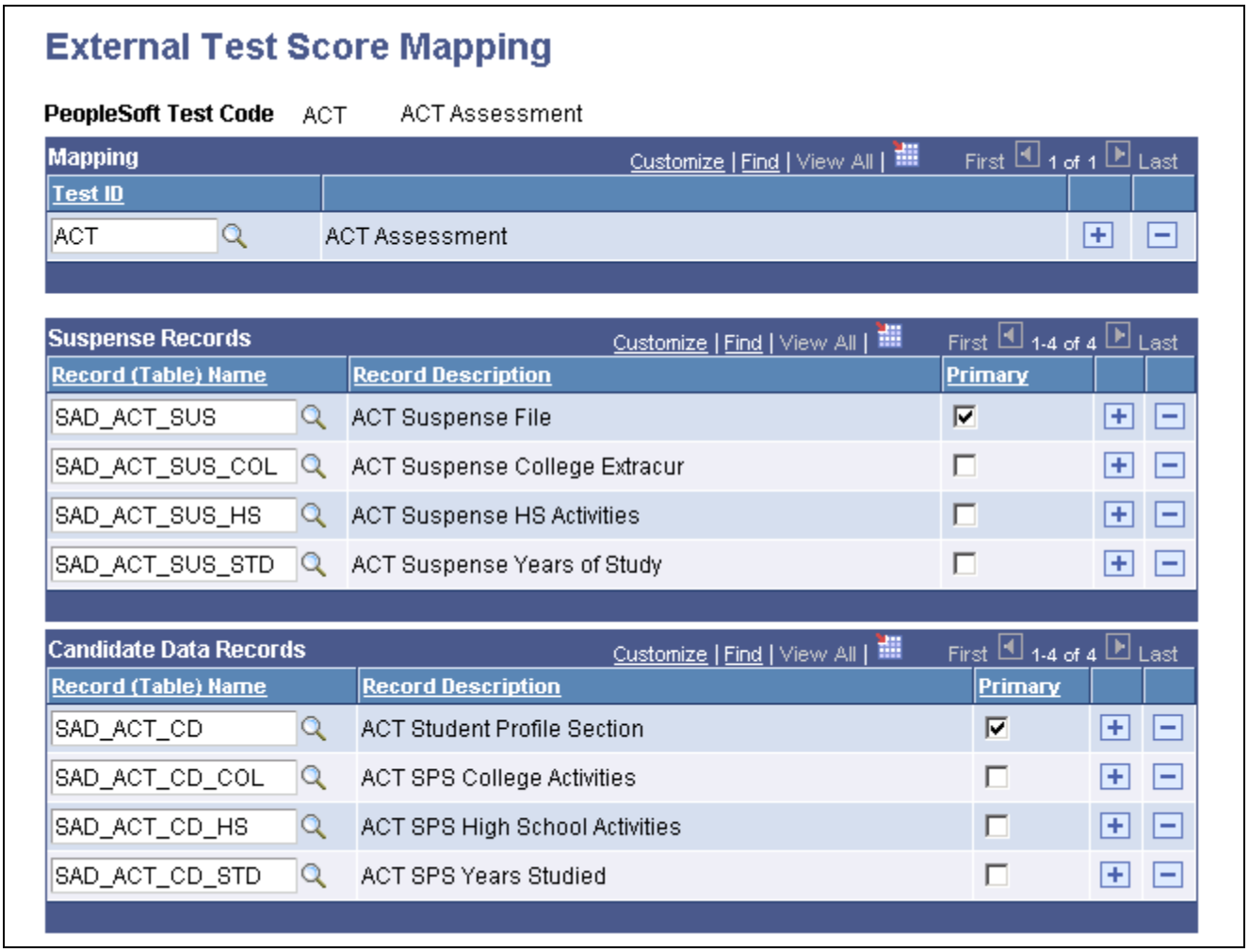
Chapter 5, "Setting Up External Test Score Loads," Mapping External Tests IDs to PeopleSoft Test Codes, page 52

Page Used to Map External Tests IDs to PeopleSoft Test Codes

Page Name	Object Name	Navigation	Usage
External Test Score Mapping	SAD_TEST_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping	Map your test ID defined on the Test Table to the PeopleSoft test code. The system needs this set up to perform a variety of external test related functions. You also use this page to determine the primary candidate data record for a test, which you need if you want to create prospect records from test score loads using a PeopleSoft Query Manager.

Mapping External Tests IDs to PeopleSoft Test Codes

Access the External Test Score Mapping page.



External Test Score Mapping page

Test ID Enter a test ID for each PeopleSoft test code. If you have more than one test ID affiliated to the PeopleSoft test code, add a row and enter the additional test ID.

Note. All you need to do on this page is enter a test ID that corresponds to a PeopleSoft test code. PeopleSoft delivers the rest of the page complete. Is it important that all test IDs you have defined that you will be loaded through the external test score load are mapped to a PeopleSoft test code or you will not be able to load the test score data.

Warning! Do not delete the Suspense or Candidate Data records delivered or change the Primary Records flag because it will affect the External Test Score Load and Create Prospects from Test Scores processes.

Mapping External Test Codes to Internal Codes

To map external test codes to internal codes,, use the Academic Interests Map component (SAD_ACAD_MAP), Extracurricular Activity Map component (SAD_EXTRA_MAP), and the Religious Preference Map component (SAD_REL_MAP).

This section provides an overview and discusses how to:

- Map academic interest codes.
- Map extracurricular activity codes.
- Map religious preference codes.

See Also

Chapter 9, "Recruiting Prospective Students," Creating Prospects When Posting External Test Scores, page 97

Understanding External Test Data Mapping

In order to populate academic interest, extracurricular activity, and religious preference information from external test score loads, you must map the testing agency codes to the corresponding PeopleSoft codes. Use the Academic Interest Map, Extracurricular Activity Map, and Religious Preference Map pages to map external codes to internal codes. These pages only need to be set up if you want to populate that data for prospects.

Map the following codes:

- Academic interest.

  You set up internal academic interest codes on the External Subject Table page. If you set up the Academic Interests Map page, when you create prospects from the external test loads listed in the table below, the system populates the Academic Interests page for each new prospect the system creates based on the data populated in the Test Score Candidate Data component. This data is provided by the student when they take the specific test.

  The following table shows the external tests that provide academic interest information, and where in the candidate data record the system finds this information for each test:

Test ID	Location in Test Score Candidate Data Component
ACT	Academics page, Academic Information group box, Major Plan field.
EOS	Test Score Candidate Data page, Student Profile Information group box, Intended Major field.
GMASS	Test Score Candidate Data page, Additional Information group box, Area of Concentration field.
SAT	Student Data page, Majors group box, First Choice and Other (1) through Other (4) fields.
SSS	Student Data page, SSS SAT I Search Information group box, SAT Search Listed Major field or SSS PSAT Search Information group box, PSAT/NMSQT Search Listed Major field.

- Extracurricular activity.

  You set up internal extracurricular codes on the Extracurricular Activity Table page. If you set up the Extracurricular Activity Map page, the system populates the Extracurricular Activities page when you create prospects from ACT or SAT external test score loads based on the data populated in the Test Score Candidate Data component. This data is provided by the student when they take the specific test.

  The following table shows the external tests that provide extracurricular activity information, and where in the candidate data record the system finds this information for each test:

Test ID	Location in Test Score Candidate Data Component
ACT	Activities page where the Participation field is selected for college activities or where the Participated field is selected for high school activities.
SAT	Student Data page, High School/Community Activities group box, and School Data page, College Activities group box.

- Religious preference

  Set up religious preference codes on the Religious Preference Table page. When you create prospects from external test loads, the system populates the Religious Preference page for each new prospect the system creates from the external test score load based on the data populated in the Test Score Candidate Data component. This data is provided by the student when they take the specific test.

  The following table shows the external tests that provide religious preference information, and where in the candidate record the system finds this information for each test:

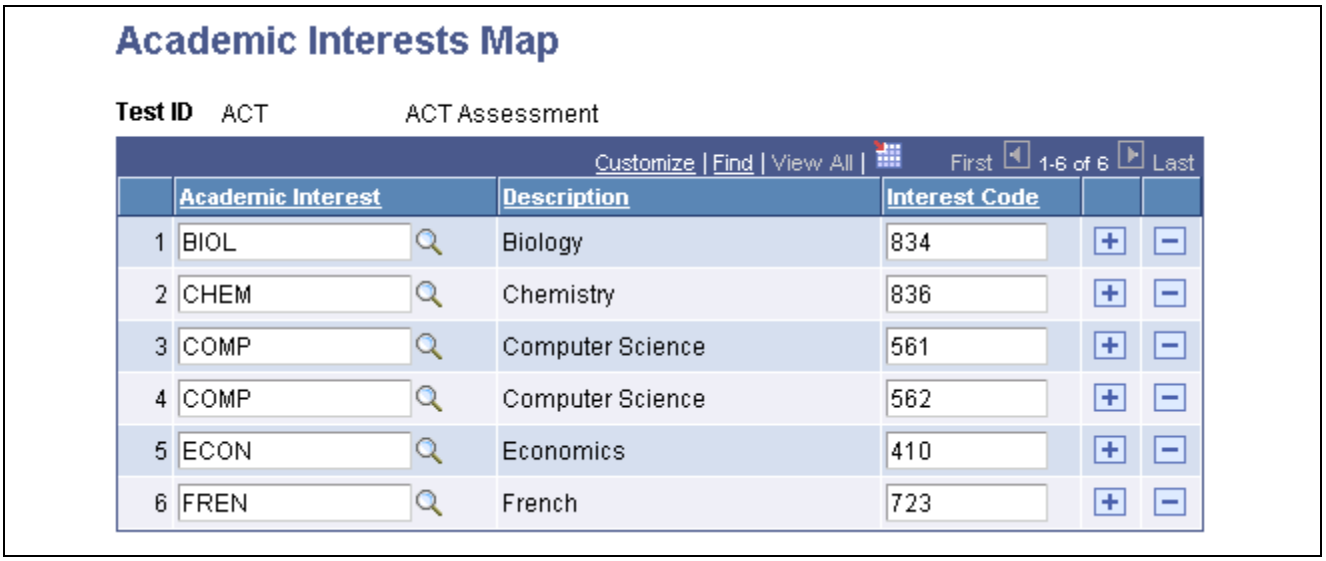
Test ID	Location in Test Score Candidate Data Component
ACT	Personal Information page, Profile Information group box, Religion field.
SAT	Student Data page, SDQ Information group box, Religion field.

Pages Used to Map External Test Codes to Internal Codes

Page Name	Object Name	Navigation	Usage
Academic Interests Map	SAD_ACAD_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Academic Interests Map	Map the academic interest codes provided by some external testing agencies to the corresponding PeopleSoft codes to capture academic interest information when creating prospects from certain test loads. Only set up this page if you want to capture academic interest information when creating prospects from test score loads.
Extracurricular Activity Map	SAD_EXTRA_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Extracurricular Activity Map	Map the extracurricular activity codes provided by the ACT and ETS testing agencies to the corresponding PeopleSoft codes to capture academic interest information when creating prospects from ACT or SAT test score loads. Only set up this page if you want to capture extracurricular activity information when creating prospects from test score loads.
Religious Preference Map	SAD_REL_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Religious Preference Map	Map the religious preference codes provided by the ACT and ETS testing agencies to the corresponding PeopleSoft codes to capture religious preference information when creating prospects from ACT or SAT test score loads. Only set up this page if you want to capture religious preference information when creating prospects from test score loads.

Mapping Academic Interest Codes

Access the Academic Interests Map page.



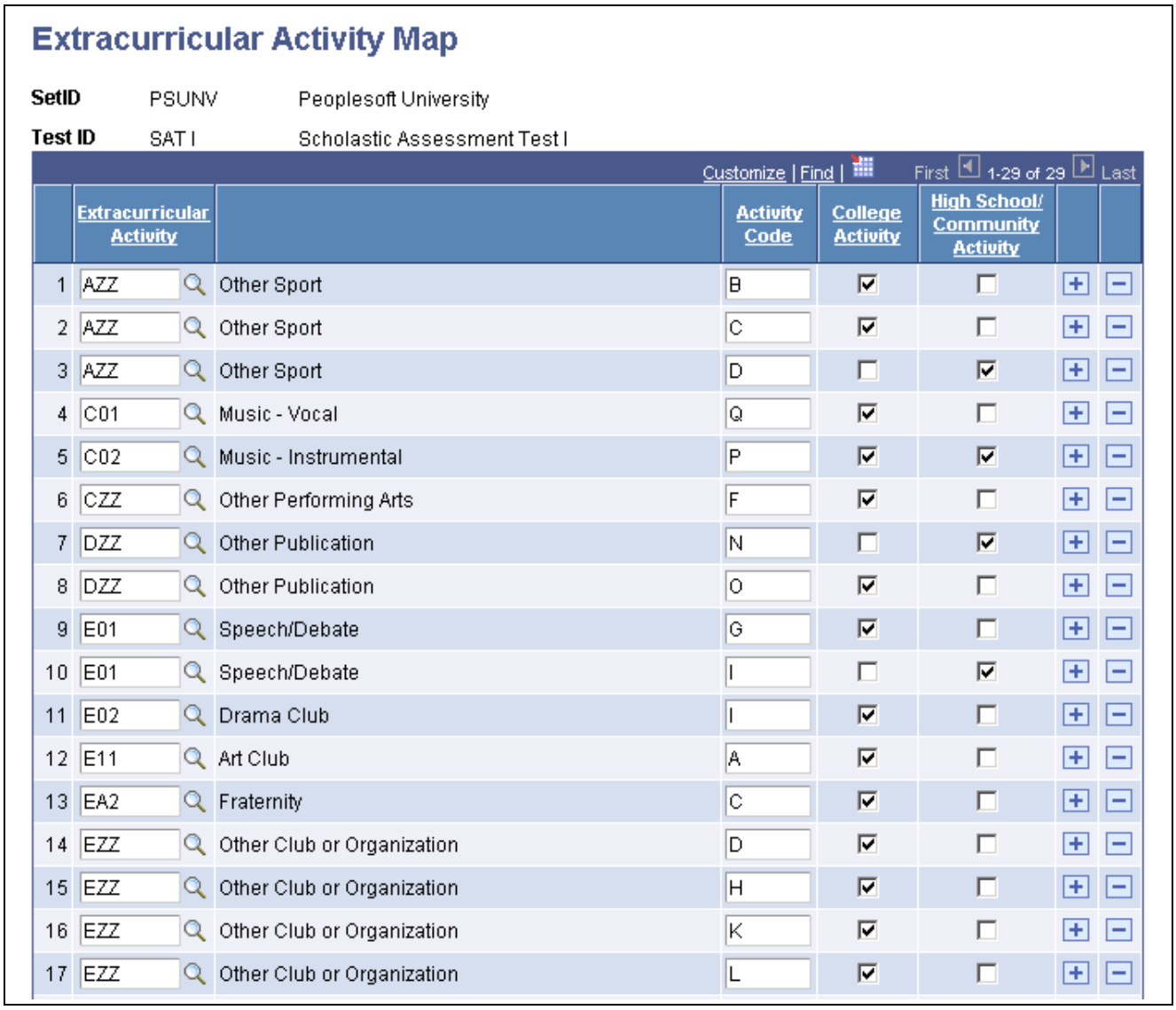
Academic Interests Map page

Academic Interest Select the internal academic interest code that corresponds to the testing agency code. Academic interest codes are defined on the External Subject Table page.

Interest Code Enter the interest code provided by the testing agency. You must contact the testing agency for these codes or refer the test score layout provided by the testing agency.

Mapping Extracurricular Activity Codes

Access the Extracurricular Activity Map page.



Extracurricular Activity Map

SetID PSUNV Peoplesoft University

Test ID SAT I Scholastic Assessment Test I

Customize | Find | First 1-29 of 29 Last

	Extracurricular Activity		Activity Code	College Activity	High School/ Community Activity
1	AZZ	Other Sport	B	☑	☐
2	AZZ	Other Sport	C	☑	☐
3	AZZ	Other Sport	D	☐	☑
4	C01	Music - Vocal	Q	☑	☐
5	C02	Music - Instrumental	P	☑	☑
6	CZZ	Other Performing Arts	F	☑	☐
7	DZZ	Other Publication	N	☐	☑
8	DZZ	Other Publication	O	☑	☐
9	E01	Speech/Debate	G	☑	☐
10	E01	Speech/Debate	I	☐	☑
11	E02	Drama Club	I	☑	☐
12	E11	Art Club	A	☑	☐
13	EA2	Fraternity	C	☑	☐
14	EZZ	Other Club or Organization	D	☑	☐
15	EZZ	Other Club or Organization	H	☑	☐
16	EZZ	Other Club or Organization	K	☑	☐
17	EZZ	Other Club or Organization	L	☑	☐

Extracurricular Activity Map page

Extracurricular Activity Select the internal extracurricular activity code that corresponds to the testing agency code. Extracurricular activity codes are defined on Extracurricular Activity Table page.

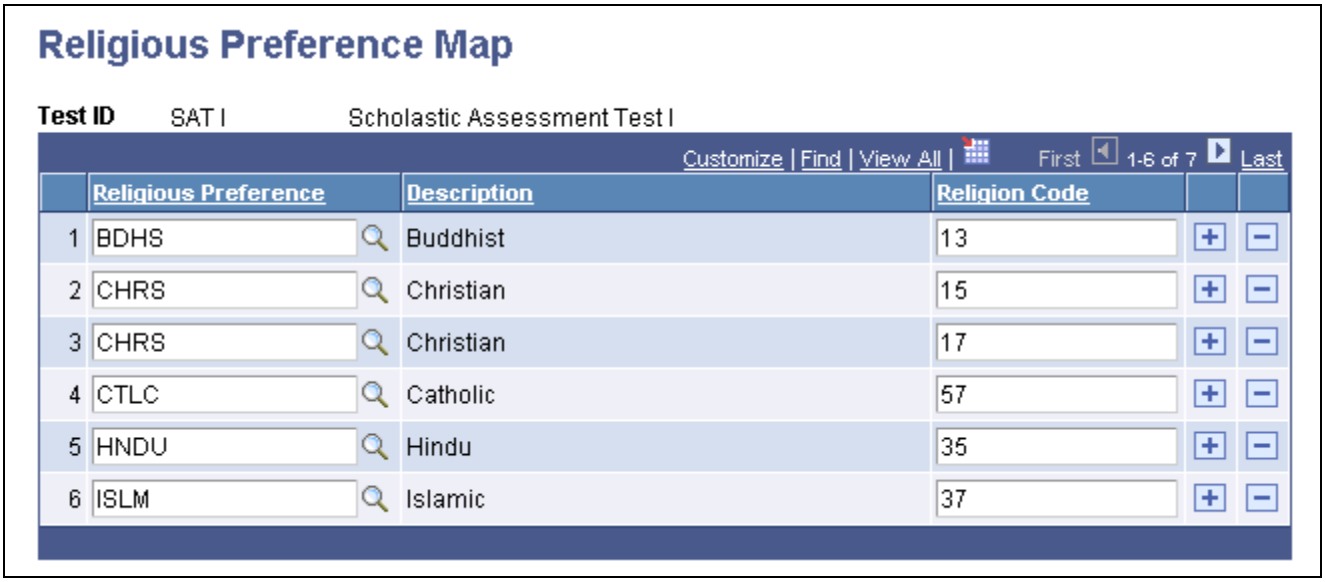
Activity Code Enter the activity code provided by the testing agency. You must contact the testing agency for these codes or refer the test score layout provided by the testing agency.

College Activity The SAT and ACT testing agencies record two types of activity information, high school/community activities the student has participated in, and the activities the student wants to participate in when in college. Select this check box if you want to populate extracurricular activities with the activity the student wants to participate in when in college.

High School/Community Activity Select this check box if you want to populate extracurricular activities with the activity from the student's high school/community activity data.

Mapping Religious Preference Codes

Access the Religious Preference Map page.



Religious Preference Map

Religious Preference Select the religious preference code that corresponds to the testing agency code. Religious preference codes are defined on the Religious Preference Table page.

Religious Code Enter the religion code provided by the testing agency. You must contact the testing agency for these codes or refer to the test score layout provided by the testing agency.

CHAPTER 6

(CAN) Setting Up to Receive OUAC Transactions

This chapter discusses how to:

- Set up EDI Manager for Ontario Universities Application Center (OUAC) transactions.
- Set up OUAC law categories.
- Set up teaching subjects.
- Set up OUAC organizations.

Setting Up EDI Manager for OUAC Transactions

Electronic Data Interchange (EDI) is a means of transmitting data electronically from one entity to another. Through the EDI Manager you can receive data files from external sources and load important recruiting and admissions data into staging tables where you can review and edit the data. Then you can post the data to tables in your database.

Before you begin processing external OUAC transactions, you must set up conversion parameters in the EDI Manager. This enables the EDI Manager to recognize OUAC elements (such as OUAC element number 400 - expected enrollment date) and to map data from OUAC elements to PeopleSoft objects (such as the field ADMIT_TERM in the table ADM_APPL_PROG).

To map OUAC elements to PeopleSoft objects, you must first define a conversion type definition for the destination objects in your database (such as ADMIT_TERM). Use the Conversion Type Definition page to define conversion type definitions. Then you must define conversion data profiles that relate internal values to external values. Use the Conversion Data Profile page to define conversion data profiles. Lastly, define an inbound map definition that links the OUAC element to the PeopleSoft object. Use the Business Document Layout page to map OUAC elements to PeopleSoft objects. EDI Manager pages are discussed in more detail in your PeopleTools documentation.

The elements that are school specific are:

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
010 - Institution	OUAC_LAW_A	OUAC_CTL_WD	INSTITUTION
	OUAC_LAW_U	OUAC_CTL_WD	INSTITUTION
	OUAC_PT	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_A	OUAC_CTL_WD	INSTITUTION
	OUAC_TEA_U	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_A	OUAC_CTL_WD	INSTITUTION
	OUAC_UAS_U	OUAC_CTL_WD	INSTITUTION
395 - University/Program Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_PROG
	OUAC_UAS_U	OUAC_D1_WD	ACAD_PROG
	OUAC_PT	OUAC_A5_U5_WD	ACAD_PROG
400 - Expected Enrollment Date	OUAC_UAS_A	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_A5_U5_WD	ADMIT_TERM
	OUAC_UAS_U	OUAC_D1_WD	ADMIT_TERM
	OUAC_PT	OUAC_A5_U5_WD	ADMIT_TERM
410 - Full or Part-time	OUAC_UAS_A	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_UAS_U	OUAC_A5_U5_WD	ACAD_LOAD_APPR
	OUAC_PT	OUAC_A5_U5_WD	ACAD_LOAD_APPR
411 - Year Desired	OUAC_UAS_A	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_UAS_U	OUAC_A5_U5_WD	ACADEMIC_LEVEL
	OUAC_PT	OUAC_A5_U5_WD	ACADEMIC_LEVEL
440 - Residence Information Requested	OUAC_UAS_A	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_UAS_U	OUAC_A5_U5_WD	HOUSING_INTEREST
	OUAC_PT	OUAC_A5_U5_WD	HOUSING_INTEREST
600 - Final or Interim	OUAC_UAS_A	OUAC_M2_WD	TRNSCRPT_STATUS
	OUAC_UAS_U	OUAC_M2_WD	TRNSCRPT_STATUS

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
755 - Last Session of Study at CEGEP	OUAC_UAS_A OUAC_UAS_U	OUAC_C1_WD OUAC_C1_WD	EXT_TERM EXT_TERM
765 - Session CEGEP Course Taken	OUAC_UAS_A OUAC_UAS_U	OUAC_C2_WD OUAC_C2_WD	EXT_TERM EXT_TERM
531 - Year Level	OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL
533 - Diploma Received	OUAC_LAW_A OUAC_LAW_U OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_G2_H2_WD OUAC_G2_H2_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE OUAC_DIPLOMA_CODE
665 - University/Program Desired	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACAD_PROG ACAD_PROG
670 - Enrollment 1 Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ADMIT_TERM ADMIT_TERM
840 - University/Program Code	OUAC_TEA_A OUAC_TEA_U OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD OUAC_D1_WD	ACAD_PROG ACAD_PROG ACAD_PROG

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
860 - Residence Information Requested	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	HOUSING_INTEREST HOUSING_INTEREST
685 - Year Level Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACADEMIC_LEVEL ACADEMIC_LEVEL
1400 - Course Level	OUAC_UAS_A OUAC_UAS_U OUAC_UAS_A OUAC_UAS_U	OUAC_F2_WD OUAC_F2_WD OUAC_F3_WD OUAC_F3_WD	COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL
825 - Degree Code	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	OUAC_DIPLOMA_ CODE OUAC_DIPLOMA_ CODE

The translates PeopleSoft maintains as TP Coverts are:

OUAC ELEMENT	Transactions	TP Convert Name
170 - Country of Current Citizenship	A4	OUAC_CNTRY
180 - Citizenship, Appendix 9.A.30	A4	OUAC_CNTRY
190 - Country of Residence, Appendix 9.A.30	A4	OUAC_CNTRY
200 - Province of Residence	A4	OUAC_PROV
220 - Immigration Status	A4	CitznStat
230 - Gender	A4	Sex
250 - Marital Status	A4	MAR_STATUS
270 - First Language	A4	Accmpl-Lng

OUAC ELEMENT	Transactions	TP Convert Name
542 - Country where attended English School	A5	OUAC_CNTRY
573 - Response to OSAP Question	A5	OUAC_Y/N
2174 - LSAT Misconduct Flag	J1	OUAC_Y/N
1080 - Country of Birth	A5	OUAC_CNTRY
280 - Language of Correspondence	A4	Accmpl-Lng
450 - Language of Instruction	A5	Language
581 - Language of Instruction	M2	Language
865 - Language of Instruction	A8	Language
430 - Previous Yr Applied to this Inst	A5	Prior_Appl
114 - Mailing Address Country	B7	OUAC_FCTRY
154 - Home Address Country	B8	OUAC_FCTRY
560 - Achievement of OSSD	M1	Degr_Stat
2168 - Plan to Write LSAT Future	J1	OUAC_Y/N
2106 - Emergency Contact Country	B9	OUAC_FCTRY

The translates PeopleSoft maintain as translate tables are:

OUAC ELEMENT	Transactions	Field Name
2201 - LSAT Details irreg code	J2, J3, J4	OUAC_LSAT_IRREG1 OUAC_LSAT_IRREG2 OUAC_LSAT_IRREG3 OUAC_LSAT_IRREG4
477 - Attended Postsecondary	A5	OUAC_ATTND_PSTSCND
475 - Authorization to Release Academic	A5	OUAC_AUTH_RELEASE
397 - Cooperative Education	A5, D1	COOP_REQ
507 - Authorization to Release Univ Performance to Sec School	A9	OUAC_AUTH_RELEASE
930 - Previously Dealt w/ University	B1	OUAC_PRV_WITH_UNIV
2020 - Ever Attended Law School	B1	OUAC_ATTEND_LAW
2145 - Fee Waiver Received	G8	OUAC_WAIVER_RCVD (check box)
2151 - All OLSAS Applications	G8	OLSAS_OSGOODE_STAT OLSAS_OTTAWA_STAT OLSAS_QUEENS_STAT OLSAS_TORONTO_STAT OLSAS_WESTERN_STAT OLSAS_WINDSOR_STAT
2095 - Authorization	G3	OUAC_EMR_CNTCT_AUT
295 - Mature Student Regulation	A4	OUAC_MATURE_STDNT
935 - Second Degree	B1	OUAC_SECOND_DEGREE

OUAC ELEMENT	Transactions	Field Name
2173 - Ethnic Code	J1	ETHNICITY_LSAC
2286 - Type	R2	OUAC_DEGREE_TYPE

The translates PeopleSoft maintain in tables are:

OUAC ELEMENT	Table Name
532 - Program of Study, Appendix 9.A.65	EXT_SUBJECT_TBL
332 - Subject of Major Interest, Appendix 9.A.80	EXT_SUBJECT_TBL
845 - Teaching Subject 1, Appendix 9.A.85 850 - Teaching Subject 2, Appendix 9.A.85	OUAC_T_SUBJECT_TBL
750 - Program Code Last Studied, Appendix 9.A.25	CEGEP_PROG_TBL
525 - Advanced Standing Program, Appendix 9.A.95	OUAC_PROG_TBL
2111 - Category, Appendix 9.A.50	OUAC_LAW_CAT_TB

See Also

PeopleSoft Supported Integrated Technologies

Setting Up OUAC Law Categories

This section discusses how to set up OAUC law categories.

Page Used to Set Up OUAC Law Categories

Page Name	Object Name	Navigation	Usage
OAUC Law Categories	OUAC_LAW_CAT_TBL	Set Up SACR, Product Related, Recruiting and Admissions, OUAC, Law Categories	Define OUAC law categories. Law categories are used on the OUAC Appl Law Cat (OUAC application law category) page.

Setting Up Teaching Subjects and CEGEP Programs

To set up teaching subjects, use the OUAC Teaching Subject (OUAC_T_SUBJECTS) and CEGEP Programs (CEGEP_PROGRAMS) components.

This section discusses how to set up teaching subjects.

Page Used to Set Up Teaching Subjects

Page Name	Object Name	Navigation	Usage
OUAC Teaching Subject Table	OUAC_T_SUBJECT_TBL	Set Up SACR, Product Related, Recruiting and Admissions, OUAC, Teaching Subjects	Define OUAC teaching subjects. Teaching subjects are used on the OUAC A8/U8 page.
CEGEP Program Table	CEGEP_PROG_TBL	Set Up SACR, Product Related, Recruiting and Admissions, OUAC, CEGEP Program Table	Define programs for CEGEP.

Setting Up OUAC Organizations

Before you can receive data from OUAC, you must first define your OUAC organizations. Use the Organization Table OUAC component to define OUAC organizations.

To set up OUAC organizations:

- Add OUAC organizations.
- Enter OUAC organization data.
- Specify a primary contact and department for an OUAC organization.
- Enter school data.
- Assign GPA types to OUAC organizations.
- Define school course classifications for OUAC.
- Define the SECSCH comment category.

Page Used to Set Up OUAC Organizations

Page Name	Object Name	Navigation	Usage
Organization Table	EXT_ORG_TABLE	Campus Community, Organization, Create/Maintain Organizations, Organization Table OUAC	Enter or update an organization.
OUAC Organization Data	EXT_ORG_TABLE_OUAC	Campus Community, Organization, Create/Maintain Organizations, Organization Table OUAC, Ouac Organization Data	Enter the Ministry of Education code, the OUAC institution code, and the current enrollment levels for the new organization.
Primary Contact and Department	EXT_ORG_PRIM_INFO	Campus Community, Organization, Create/Maintain Organizations, Organization Table OUAC, Prim Contact and Dept.	Identify the department and person that your institution should contact for an organization.
School Data	EXT_ORG_SCHL_DATA	Campus Community, Organization, Create/Maintain Organizations, Organization Table OUAC, School Data	Enter data that applies to the organizations that offer courses.
Organization Affiliation	EXT_ORG_AFFLTN	Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation	Identify details that are important to your institution in affiliation with an organization.
School Course Classification	SCHOOL_COURSES	Campus Community, Organization, Create/Maintain Organizations, School Course Classification	Record the specific course offerings for each subject area.
Comment Category Table	CMNT_CATG_TABLE	• Campus Community, Comments, Define Comments, Comment Category Table • Set Up SACR, Common Definitions, Comments, Comment Category Table	Set up comment categories that enable you to group comments for similar purposes.

Adding OUAC Organizations

Access the Organization Table page.

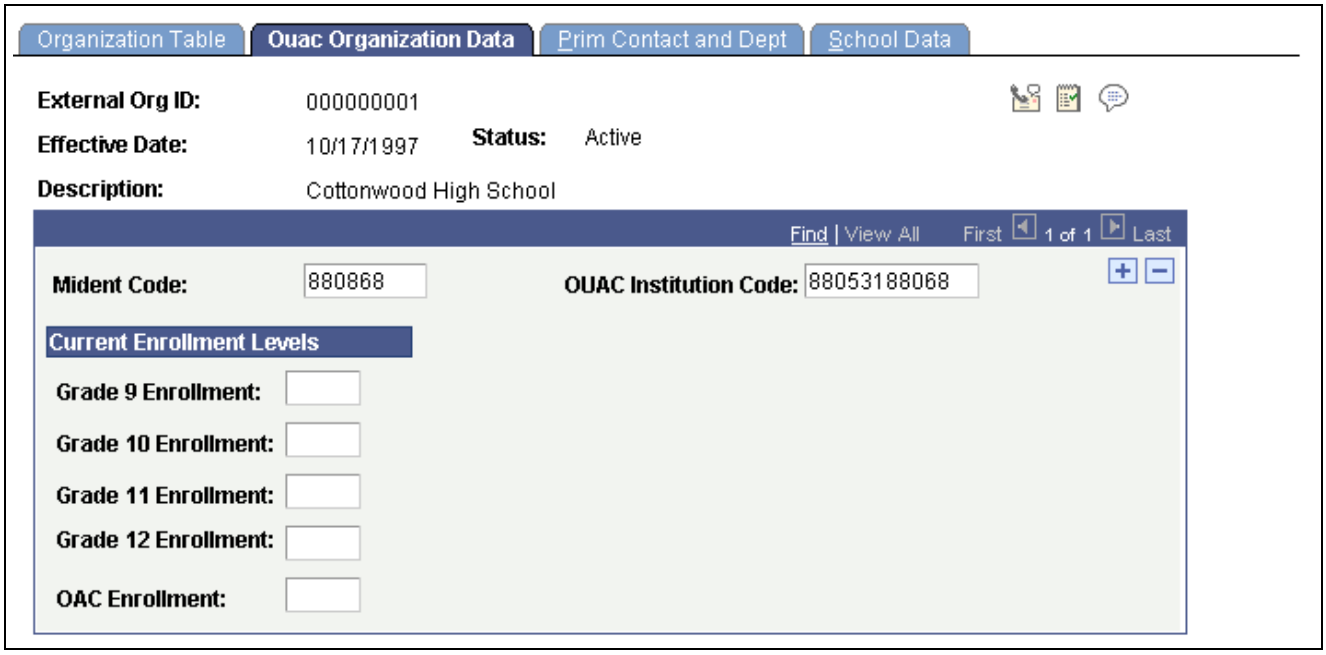
Use the Organization Table page to add OUAC organizations. You can enter definitions for the organization, elect an organization type and a location.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding Organizations to Your Database"

Entering OUAC Organization Data

Access the Ouac Organization Data page.



Ouac Organization Data

Mident Code Enter the Ontario Ministry of Education six digit school code.

OUAC Institution Code Enter the code that identifies OUAC institutions—when you post OUAC data the process looks for this code to populate the EXT_ORG_ID field.

Grade 9 (through 12) Enrollment Enter the current enrollment levels for the respective grades.

OAC Enrollment Enter the total OUAC enrollment.

Specifying a Primary Contact and Department for an OUAC Organization

Access the Primary Contact and Department page.

Use the Primary Contact and Department page to specify an organization's primary contact person or the department to contact, to help streamline your institution's communication with that organization.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding Organizations to Your Database"

Entering School Data

Access the School Data page.

Use the School Data page to enter school characteristics, school codes, and system default values.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding Organizations to Your Database," Entering School Related Data

Assigning GPA Types to OUAC Organizations

Access the Organization Affiliation page.

GPA type must have a value entered to populate a grading scheme on the External Courses page when OUAC transmissions are processed. This is important because grading scheme is a required field on external courses and if it is not populated the user can not make any changes to that page without getting an error message. Use the Organization Affiliation page to define a GPA type for an organization.

See Also

PeopleSoft Campus Community Fundamentals PeopleBook, "Maintaining Organization Data," Entering Affiliations with Organizations

Defining School Course Classifications for OUAC

Access the School Course Classification page.

Use the School Course Classification page to define school course classifications for OUAC organizations. The values you enter on this page populate fields on the External Courses page when you post OUAC transmissions.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Organization Data," Setting Up External Subject Categories and Term Sessions

Defining the SECSCH Comment Category

Secondary school comments on the A9 transaction appear on the Comments pages. To view them, you must first set up the comment category "SECSCH". You must also tie it to at least one 3C group. Use the Comment Category Table page to define the SECSCH comment category. Use the Comment 3C Groups page to tie the SECSCH comment category to a 3C group.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Comments," Setting Up Comment 3C Groups

CHAPTER 7

Setting Up for Evaluating Applicants

To set up for evaluating applicants, use the Rating Comp Definition component (RATING_COMP_DEF), Rating component (RATING_TABLES), Evaluation component (EVALUATION), and the Evaluation Status component (EVALUATION_STATUS).

This chapter lists prerequisites and discusses how to set up for evaluating applicants.

Prerequisites

Before you begin performing applicant evaluations, you must set up the following:

- Rating components.
- Rating schemes.
- Evaluation codes.
- Evaluation status codes.
- Evaluation committees.

Pages Used to Set up Applicant Evaluation

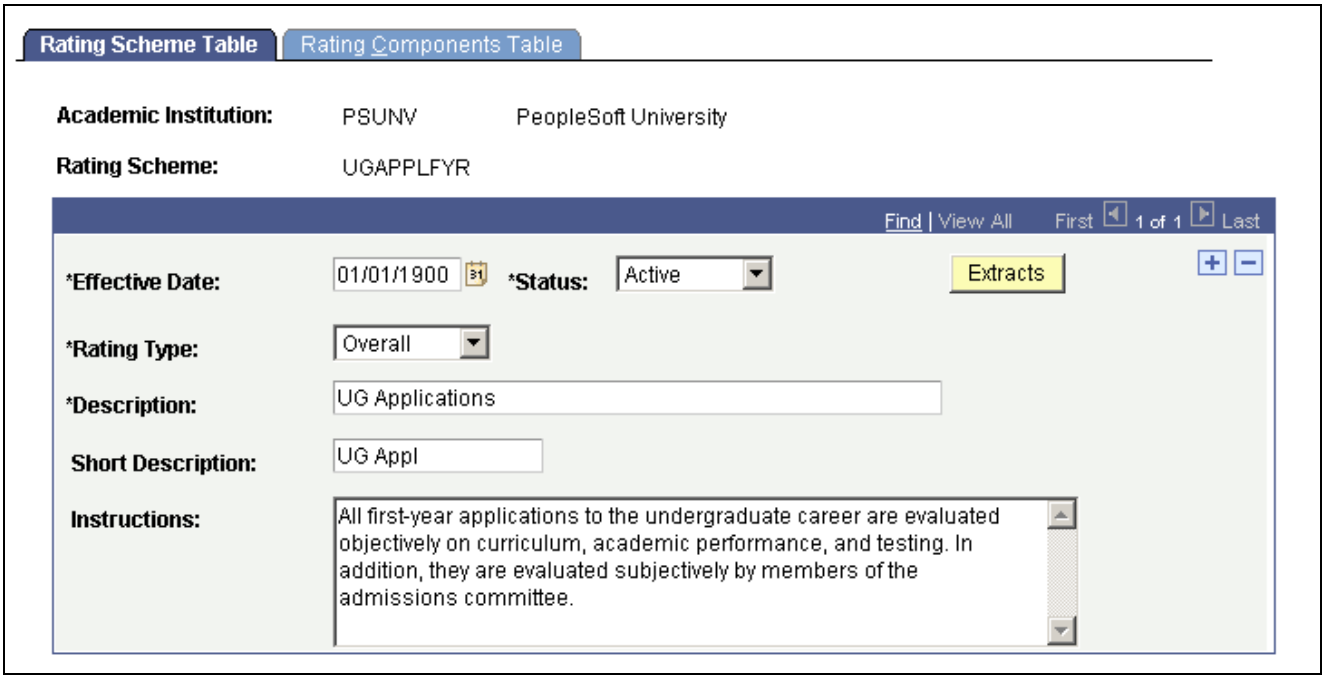
Page Name	Object Name	Navigation	Usage
Rating Comp Def Table (rating component definition table)	RATING_COMP_DEF	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Comp Definition Table	Define rating components. Rating components are specific criteria that you use to rate applicants. For example, you could have components such as extracurricular activities, academic preparation, highest SAT, and so on. You use rating components to define rating schemes.

Page Name	Object Name	Navigation	Usage
Rating Scheme Table	RATING_SCHEM_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables	Define rating schemes. The admissions evaluation process uses rating schemes to evaluate applicants. For example, you could have one rating scheme for undergraduate applicants and another for undergraduate engineering applicants. Rating schemes can be defined for manual and automatic evaluations.
Materials Extract Detail	RATING_SCHEME_SP	Click the Extracts button on the Rating Scheme Table page.	Enter the SQCs for your material extracts.
Rating Components Table	RATING_CMP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables, Rating Components Table	Select the rating components that make up your rating scheme. For example, an undergraduate first year rating scheme could consist of components such as overall rating, academic preparation, highest ACT score, highest SAT score, and subjective committee rating. Later, you can assign scores to each component, which can be averaged for an overall score for the rating scheme.
Evaluation Table	EVALUATION_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables	Define evaluation codes and the rating schemes linked to them. You must assign evaluation codes—either manually or automatically—to evaluations during the evaluation process. Evaluation codes contain default information that populates fields (such as rating scheme) in the General Evaluation and Application Evaluation components on evaluation pages when you assign an evaluation code to an applicant. Thus, evaluation codes act as templates, making data entry much speedier when creating evaluation records.

Page Name	Object Name	Navigation	Usage
Evaluation Committee Table	EVAL_COMMITTEE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables, Evaluation Committee Table	Assign evaluation committees to your evaluation codes (if applicable).
Evaluation Status Table	EVAL_STATUS_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Status Table	Define evaluation status codes. For example, you can set up statuses such as Final, On Hold, and In Progress. Later, when evaluating applicants, you will enter these statuses on evaluation pages as well as on the Application Program Data page under the Application Maintenance menu.

Defining Rating Schemes

Access the Rating Scheme Table page.



Rating Scheme Table page

Rating Type Select a rating type for this scheme. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Application, Audition, Committee, Interview, Overall,* and *Portfolio.*

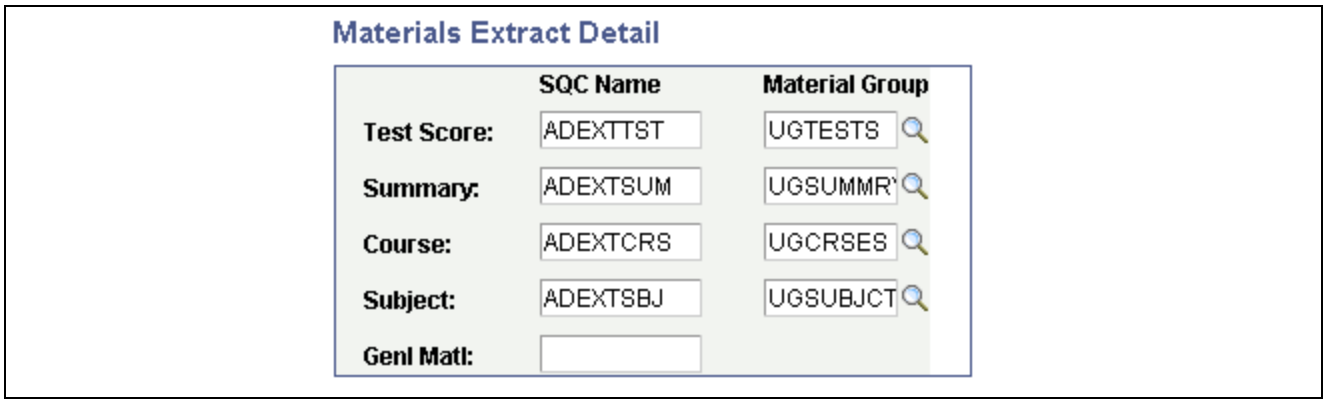
Note. If you plan to evaluate applicants using automated processes, you must define a rating scheme with an *Overall* rating type.

Instructions Enter any pertinent information regarding this rating scheme.

Extracts Click this button to enter the SQCs for your material extracts. The Material Extract Detail Page for this rating scheme appears.

Using the Material Extract Detail Page

Access the Materials Extract Detail page.



Material Extract Detail page

Test scores, academic summaries, course/subject information, and general materials are linked to a *person.* When you evaluate applicants, you might want to consider only certain materials for a particular evaluation, rather than considering all materials for the person. Within PeopleSoft Recruiting and Admissions you can manually associate the appropriate application materials to an application (on the Application Materials page), or you can associate application materials to applications using the Application Materials Extract process. To associate materials to an application using the application materials extract process, you use SQCs to define which information to extract and use in your evaluation process. Use the Materials Extract Detail page to enter the name of the SQCs that extract appropriate material information (at the person level) for evaluating applicants.

Enter the SQCs that you want to be executed by the SQR that your institution has defined to retrieve test scores, summaries, courses, subjects and general materials. PeopleSoft delivers the example SQCs shown on the previous page shot but you will need to create your own SQCs to meet your specific business process needs.

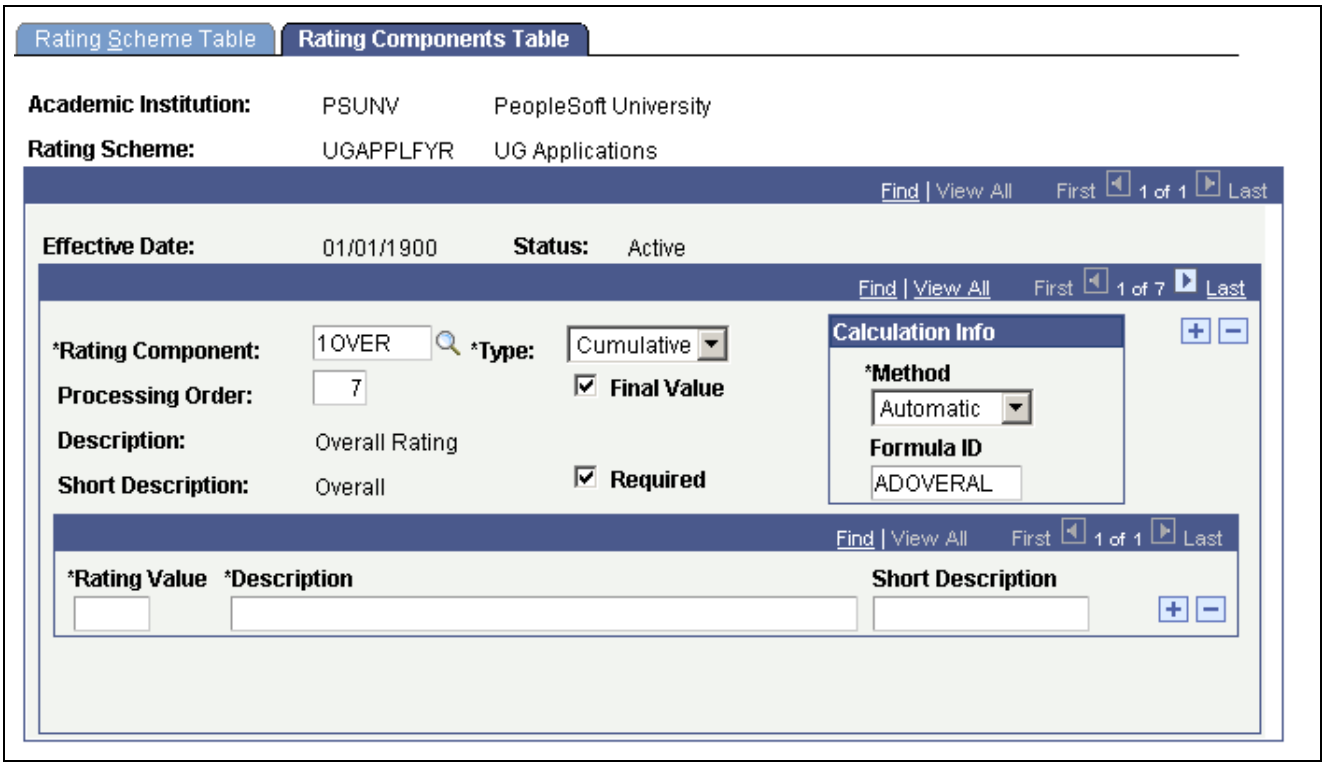
For each SQC, except general materials, select the appropriate material group from which you will extract data. Material groups are made up of material types. The information you extract can later be viewed on the Application Materials Summary pages.

See Chapter 12, "Tracking General and Application Materials for Prospects and Applicants," Pages Used to View Summary Application Materials Information, page 154.

Note. You can use the application materials extract process to associate transcript information to an application. To associate transcript information to an application, use the Materials Extract Detail page to enter the SQC name for summary information, which contains the transcript information. Or, you can manually associate transcript information to an application on the Application Materials page.

Assigning Components to Rating Schemes

Access the Rating Components Table page.



Rating Components Table page

Rating Component Select a rating component for this rating scheme. Rating components are specific criteria that you use to rate applicants. When you're ready to evaluate applicants, you can assign scores to each rating component (if you are evaluating the applicant manually), which can be averaged for an overall score for the rating scheme. Assign rating components on the Rating Component Definition Table page.

Type Identify the type of rating component that you selected. This identifies the rating component as an individual component (such as Essay), or one that is made up of other components (such as Overall). Component types are useful for informational and reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Cumulative* and *Individual.*

Processing Order Enter the order in which this component should be processed within the group of components assigned to this rating scheme.

Final Value Select this check box if this component is one on which you base admissions decisions. The application status update process that posts results of an evaluation to the application looks to see if all components with this check box selected have been fulfilled before posting a result. You can have only one component selected as final value (such as overall rating), if that component is the only component that needs to be fulfilled before evaluating the applicant. You can also have more than one component selected as final value (such as overall, highest GPA, and highest test score), if you require all of these components to be fulfilled before evaluating the applicant.

Required Select this check box if this component *must* be considered for this rating scheme. For example, suppose you have a rating scheme that requires the testing component, which looks for a person's highest ACT or highest SAT

score. Suppose further that within this rating scheme you also have separate components for SAT and ACT, but they are *not* marked required. If a component is not marked as required, your rating scheme process knows to continue to the next component if this component does not exist for this applicant. If a component is marked required, the process will not continue if the component is missing. So in our example, there would have to be an ACT*or* SAT score, but not both, since only the testing component is required.

Method Select the calculation method for this component. Component rating values can be calculated automatically, in which case the Assign Adm Applicant Rating (assign admissions applicant rating) process calculates the rating value for you. Or you can calculate the value manually, which means you will enter a score yourself. For example, you would most likely want to calculate an objective rating component (such as overall rating) automatically. Thus, the process would look at various data to come up with the overall rating score for an applicant. On the other hand, you would probably want to enter subjective scores (such as for the recommendations rating component) manually.

Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Automatic* or *Manual.*

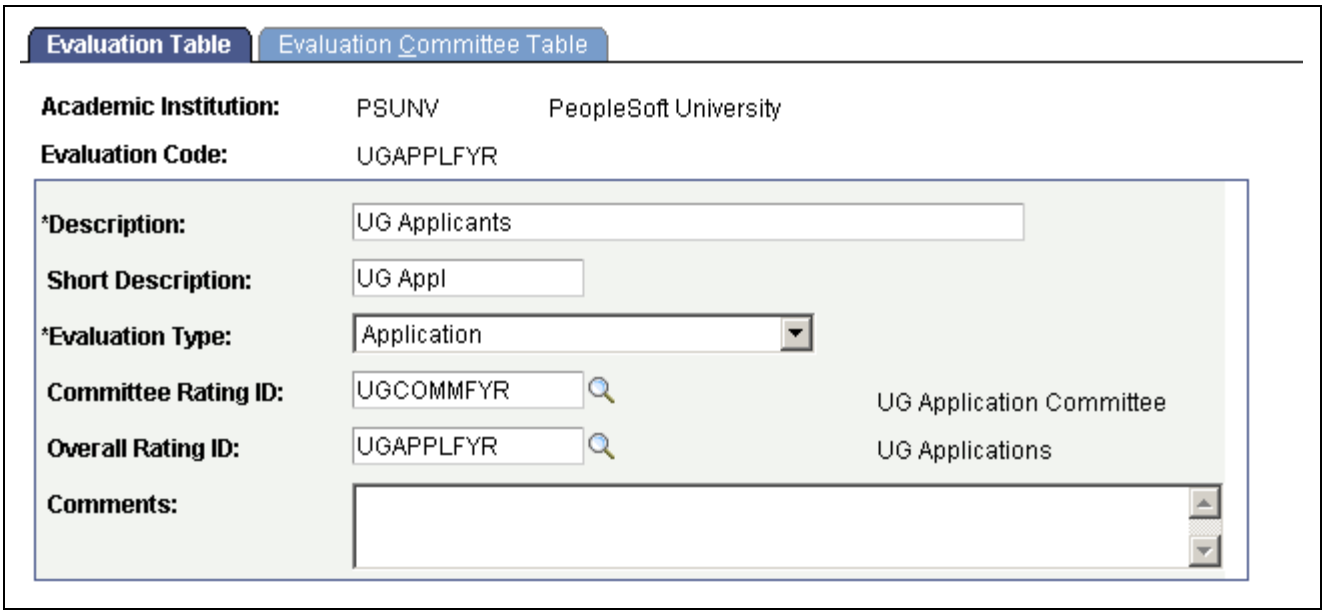
Formula ID If you selected *Automatic* in the Method field, enter a formula ID. Formula IDs are the names of the SQCs that provide the programming logic for components. These are the programs that retrieve the data for the evaluation calculation. PeopleSoft delivers sample SQCs but you will need to create your own to meet your business process needs.

Rating Value Enter a numeric rating value if the component is calculated manually. For example, suppose you wanted the essay component to be used as part of a committee evaluation. You could assign rating values (such as poor, average, and so forth) to the essay component, as on the previous page example. Then, when evaluators enter evaluations for these components (on the General Evaluator Detail page or the Application Evaluator Detail page), they can prompt for these rating values.

Note. The rating values you enter here are not retrieved through the Application Evaluation process, as are objective values such as test scores and GPA. Individual evaluators will use the rating values you enter here when they rate subjective materials (such as essays).

Defining Evaluation Codes

Access the Evaluation Table page.



Evaluation Table page

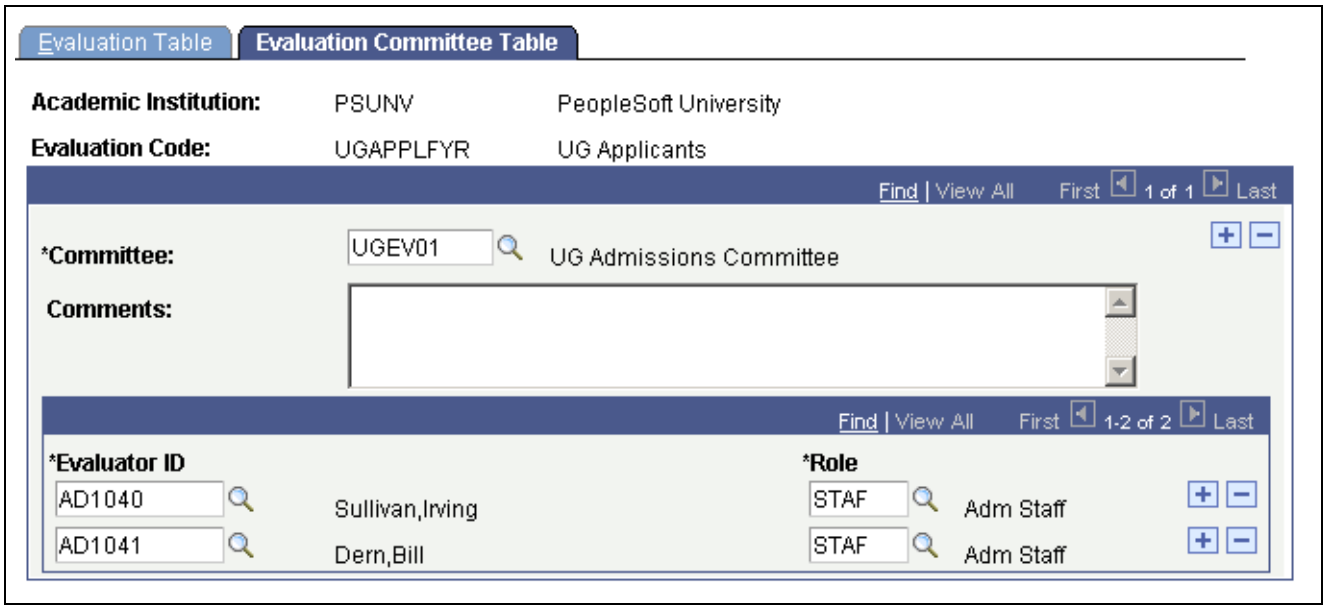
Evaluation Type Select an evaluation type for this evaluation code. You can define evaluation codes that can be used for evaluating applicants *(Application),* or you can define evaluation codes that can be used for evaluating individuals *(General).* In the latter case, the evaluation code will be assigned to a person, rather than an application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Application* and *General.*

Committee Rating ID If committees perform this evaluation, select the rating scheme that the committee will use with this evaluation code. You assign actual committees to this evaluation code on the next page in this component. Define rating schemes on the Rating Scheme Table page.

Overall Rating ID Assign an overall rating scheme if you use this rating code for overall evaluations.

Defining Evaluation Committees for Admission Applications

Access the Evaluation Committee Table page.



Evaluation Committee Table page

Committee Select a committee to be assigned to this evaluation code. You can add more than one committee for an evaluation code. Define committees and committee members on the Committee page in PeopleSoft Campus Community.

Evaluator ID Enter the evaluators who sit on this committee. All members of this committee automatically appear as evaluators, along with their role on the committee. You can add evaluators who are not already assigned to this committee.

Role Select evaluator roles for the evaluators that you add. Roles for committee members appear from the Committee Members page.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Committee Data"

Defining Evaluation Status Codes

Access the Evaluation Status Table page.

Evaluation in Progress Select this check box if the evaluation status that you're defining is defined as in progress (such as *In Progress,* and as opposed to *Final).* Applicant evaluation processes only process applications whose current evaluation status is one that has this check box selected.

Setting Up Student Response

To set up student response, use the Response Reason component (RESP_RSN_TABLE).

This section discusses how to set up the reasons why applicant chose or rejected your institution You can set up a series of adapted reason response codes that enable you to capture and track the specific information that you want. You can use the Student Response page to capture why students *did select* your school, or why students chose *not* to attend your school and where they are going instead. This information can also be captured on the Accept Admission self-service feature. If a student has multiple applications on file, a response can be captured for each individual application. Multiple reasons can also be captured for each application.

See Also

Chapter 14, "Adding and Updating Applications," Updating Applications, page 202

Page Used to Set Up Student Response

Page Name	Object Name	Navigation	Usage
Student Response Reason Table	RESP_RSN_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Response Reason Table	Define reason codes for capturing the reason why a student decided to attend another institution or why the student did select your school.

Enabling Student Response for a School Type

Each external organization that you define in the system must have a school type code assigned to it. When you define a school type code, you must specify whether this school type will be considered when using the Student Response feature. Then, when you use the Student Response page, the External Org ID (external organization ID) field prompt dialog box displays a list of external organizations whose school type codes have the Student Response option enabled. Use the School Type Table page to enable the Student Response feature for school types.

See Also

Chapter 3, "Setting Up Prospects," Setting Up School Types, page 26

CHAPTER 8

Setting Up Admissions Program Actions and Program Action Reasons

To set up admission program actions and program action reasons, use the Admission Action component (ADM_ACTION_TABLE), Program Action component (PROG_ACTION_TABLE), and the Program Action Reason component (PROG_RSN_TBL).

This chapter discusses how to set up admissions program actions and action reasons.

Setting Up Admissions Program Actions and Program Action Reasons

This section discusses how to:

- Review admissions program action values that are delivered with your system.
- Define admissions program action reason values.

Pages Used to Set Up Admissions Program Actions and Program Action Reasons

Page Name	Object Name	Navigation	Usage
Admissions Action Table	ADM_ACTION_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Admissions Action Table	View admissions program actions.
Program Action Table	PROG_ACTION_TABLE	Set Up SACR, Product Related, Student Records, Program Action, Program Action Table	Modify program action descriptions. Program action codes designate the status of a student in a program from the time he or she is an applicant and throughout his or her academic career. For example, a student must have a program action of *Matriculate* to become a student, and a program action of *Activate* in any term in which she wants to enroll. You can change the effective date and status for the program action codes that PeopleSoft provides. By changing the effective date and status you can render a program action code inactive so that it is longer available to your users. **Note.** Program actions are predefined and cannot be changed on this page.
Program Action Reason Table	PROG_RSN_TBL	• Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Program Action Reason Table Set Up SACR, Product Related, Student Records, Program Action, Program Action Reason Table • Set Up SACR, Product Related, Student Records, Program Action, Program Action Reason Table	Define program action reasons. You can define multiple reasons for one action. For example, for the action *Administrative Withdrawal,* you can define a reason of *Incomplete Application* as well as a reason of *No Response.* These reasons enable flexibility with the program action codes delivered with your system.

Reviewing Admissions Program Action Values

Access the Admissions Action Table page.

Program actions are shared with PeopleSoft Student Records. The only values you will see on this page are those that are specific to admissions. Similarly, when you prompt for a program action on PeopleSoft Recruiting and Admissions pages, you will see only a list of those values that are relevant to admissions.

Values for this table are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. For your convenience, you can view the admissions specific program actions in this table without accessing the translate table.

Defining Admissions Program Action Reason Values

Access the Program Action Reason Table page.

Program Action Reason Table page

The reason values for the program actions in this table are shared with PeopleSoft Student Records.

Important! To automatically populate the Date of Death field for an applicant on the Decedent Data page, an action reason code of DEAT (Deceased) must be defined for the program action entered on the admissions application.

CHAPTER 9

Recruiting Prospective Students

This chapter lists prerequisites and discusses how to:

- Add prospects to your system individually through the Prospect Data component.
- Create prospects when posting external test scores.
- Create prospects from test scores using query.
- Add prospects through a system-wide query.
- View prospect information.
- Assign regions, recruiting categories, and recruiters on a mass basis.

Understanding Adding Prospects

You can add prospects to your system:

1. Individually, through the Prospect Data component.
2. Individually, through PeopleSoft Enterprise Campus Self-Service (prospects create themselves through self-service).
3. Individually or in a group when you create an application, depending on your setup.

   See Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 21.
4. In a group, for all individuals within a single posting of test scores.
5. In a group, by creating a user-defined query of individuals who have posted test scores from previous test score loads.
6. In a group, by creating a user-defined query of individuals in your system.

Prerequisites

Before you enter prospects into the system, set up your recruiting structure. Your recruiting structure consists of recruiting regions and recruiters. You must also define honors, awards, school types, admit types, extracurricular activities, and so on, before you can assign them to prospects.

See Chapter 2, "Building Your Recruiting Structure," page 7.

Before you add prospects, search the database to see if biographical and demographic records exist for the person. The person might already be in your database as an employee, instructor, or student in another academic institution or career. To determine if the prospect exists in your system, select Student Recruiting, Maintain Prospects, Search Match.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Setting Up Search/Match".

If the person already exists in your database, you must determine if there is a prospect record for the academic institution and career before you create a new prospect record. Only one prospect record can exist for an institution and career combination.

Adding Prospects Through the Create/Update Prospects Component

The Prospect Data component is the first of three similar components:

- Create/Update Prospects component.
- Add Application component.
- Maintain Applications component.

Create/Update Prospects and Add Application have a Biographical Details page and a Regional page. All three components have other pages with similar names, such as Prospect Academic Program Data page and Application Program Data page. Use these components to enter or maintain similar information at different points in time during the admissions process.

The 3C buttons are common to multiple pages within this component and are defined in the preface of this PeopleBook: Add a New Communication, Add a New Checklist, and Add a New Comment.

Note. The system automatically populates many of the values in this component according to your user defaults. These fields are indicated in the documentation by the phrase *(user defaults)*.

This section discusses how to enter and update the following information for prospects:

- Academic career data.
- Academic program data.
- School and recruiting data.
- Event attendance.
- Event meeting information.

Pages Used to Add Prospects

Page Name	Object Name	Navigation	Usage
Prospect Career Data	ADM_PRSPCT_CAR	Student Recruiting, Maintain Prospects, Create/Update Prospects	Enter pertinent prospect career data.
Prospect Program Data	ADM_PRSPCT_PROG	Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect Program Data	Enter information about programs, plans, or subplans in which a prospect has expressed interest.
Prospect School/Recruiting	ADM_PRSPCT_RECRUIT	Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect School/Recruiting	Enter recruiting information for a prospect. This page stores information such as the last school that a prospect attended and the recruiting region to which this prospect belongs.
Attendee Events	EVENT_ATTENDEE_SEC	Click the Events link on the Prospect School/Recruiting page.	Register a prospect for events or to record events that the prospect attended.
Attendee Meetings	EVENT_MEETING_SEC	Click the Meetings button on the Attendee Events page to open the Attendee Meetings page.	Record information regarding meetings that are associated with an event.

Entering and Updating Prospect Biographical Details

Use the Biographical Details page to enter or update any personal, demographic, or address information for the prospect.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, “Managing Biographical Information,” Understanding Biographical Information.

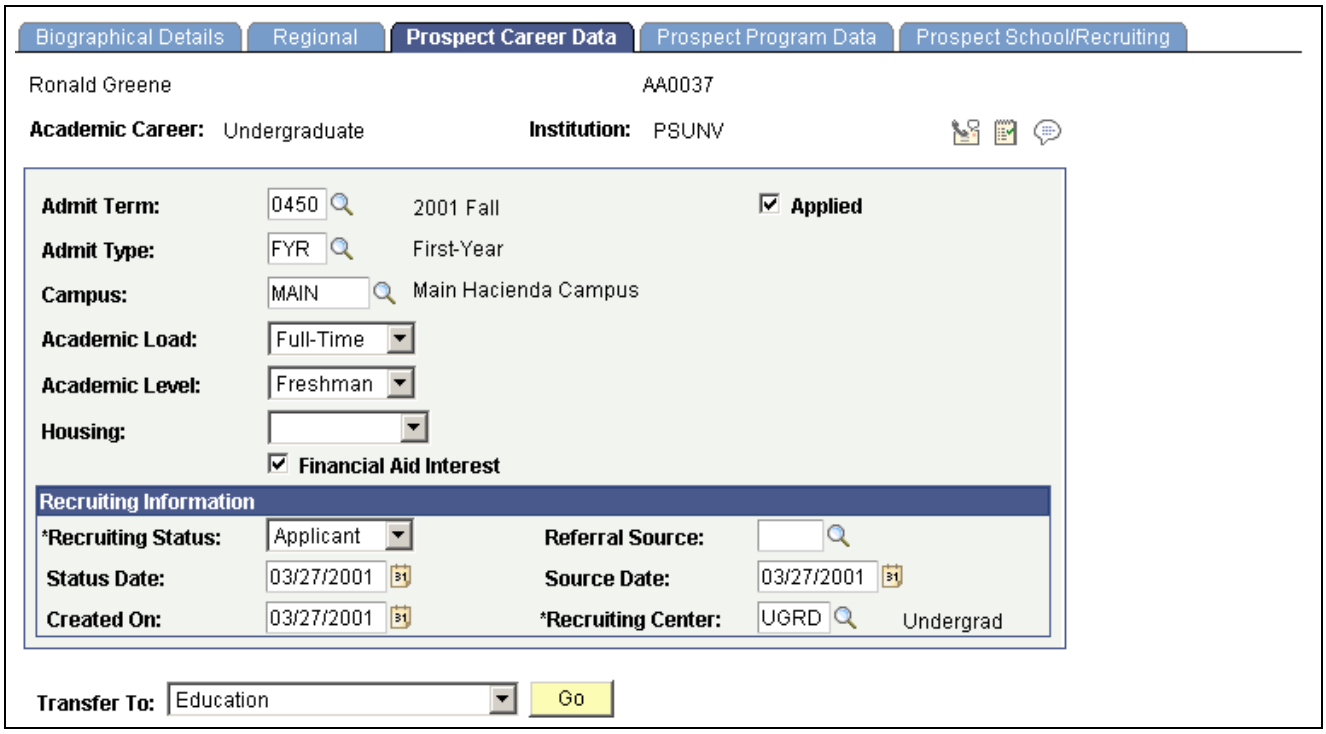
Entering and Updating Prospect Regional Data

Use the Regional page to view, enter, and update prospect regional information.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, “Designing Campus Community,” Setting Up Regulatory Regions.

Entering and Updating Prospect Academic Career Data

Access the Prospect Career Data page.



Prospect Career Data page

You can create multiple academic career records for a prospect by adding prospect records for each academic career. The Prospect Biographical Details page and the Regional page are the same for each academic career because the data on those pages is shared. The data on the remaining pages in the Create/Update Prospects component is unique to each academic career. Prospects are tracked at the academic career level.

Admit Term Select the admit term for the prospect's career. Define admit terms on the Term Table page. (user defaults)

Admit Type Select the prospect's admit type for this career. Define admit types on the Admit Type Table page. (user defaults)

Campus Select a campus to associate the prospect to a specific campus. Define campuses on the Campus Table page. (user defaults)

Academic Load Select the appropriate academic load for this career. Values for this field are delivered with your system as translate values. You can modify these translate values.

Academic Level Select the academic level for this career. Values for this field are delivered with your system as translate values. You can modify these translate values. (user defaults)

Housing Select any housing interest that this person indicated. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Commuter, Off Campus,* and *On Campus.* This field is for informational purposes. (user defaults)

Financial Aid Interest Specify whether this prospect indicated an interest in financial assistance. This field is for informational purposes only. (user defaults)

Applied The system automatically updates this check box when the prospect applies to your institution if, on the Installation Defaults - AD page, you set up the system to update prospect records when prospects become applicants.

Recruiting Status Select the person's recruiting status. The recruiting status indicates the level of interest, at the academic career level, that your institution has in the prospective student. For example, you might consider a person who attended an on-campus event a suspect (someone who you *suspect* is interested in your institution). Conversely, you might consider a person who sends a prospect card a prospect (someone who you know is interested in your institution). This field is also helpful for targeting mass mailings. Values for this field are delivered with your system as translate values. These translate values can be modified. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*

Status Date Enter the date, if different than the default date, on which you entered or updated the recruiting status. The default date is the system date on the day the record was added.

Created On Enter the date, if different than the default date, on which this prospect record was created. The default date is the system date on the day the record was added.

Referral Source Select the appropriate referral source for this prospect. A referral source indicates how this person became a prospect. The referral source is a high level indicator of how your institution came into contact with the person. For example, a referral source could be *Drop-In, Campus Event,* or *College Fair.* Although this is a way to track your first contact with this person, record subsequent contacts with the Communications pages. Define referral sources on the Referral Source Table page.

Source Date Enter the date, if different than the default date, on which you entered this referral source. The default date is the system date on the day the record was added.

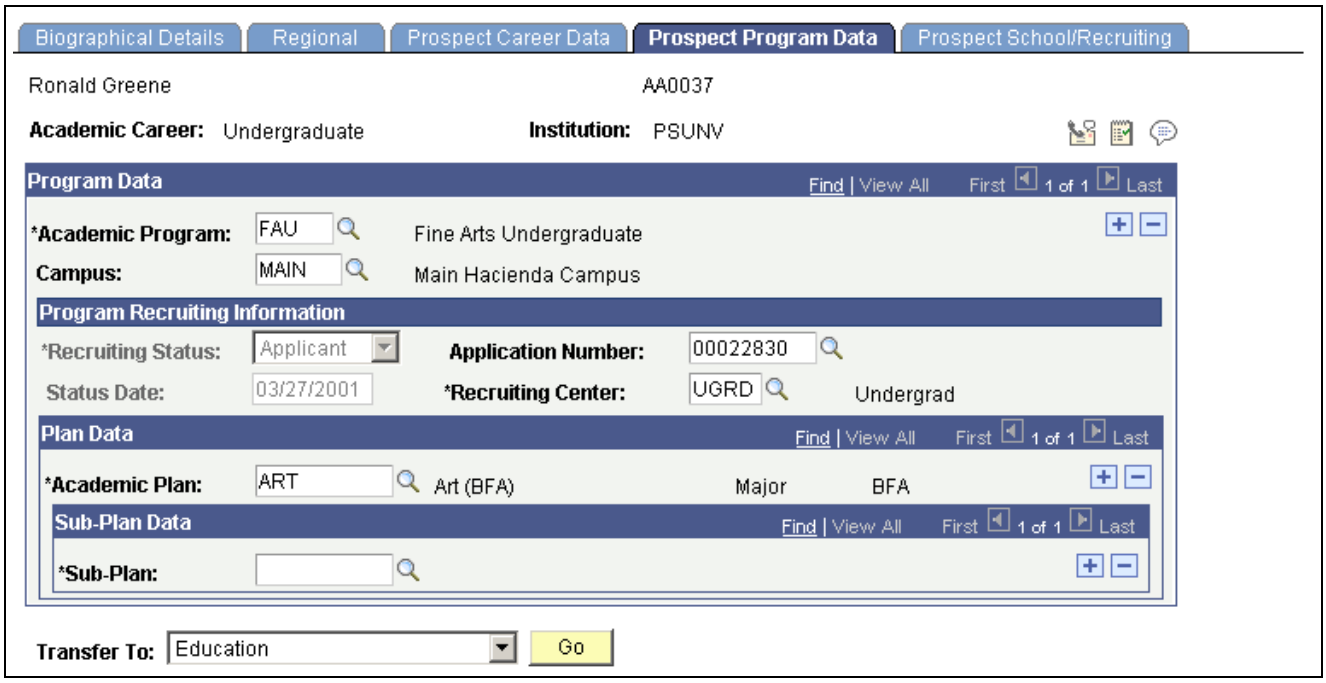
Recruiting Center Select the recruiting center that is responsible for this prospect's career. Define recruiting centers on the Recruiting Center Table page. Valid values depend upon the academic career that you select and are subject to user security established for recruiting centers. (user defaults)

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this prospect.

Note. To enter an additional career for a prospect, re-enter the component by selecting Add and enter the new academic career when prompted by the system.

Entering and Updating Prospect Academic Program Data

Access the Prospect Program Data page.



Prospect Program Data page

Although you are required to enter prospect career data, you are not required to enter prospect program data because you might not have that information at this stage in the process. Your institution has several options for tracking prospects (for example, by programs under a career, by academic plans under programs, and by sub-plans under academic plans).

Recruiting Status

Select the recruiting status for this program. Depending on your settings on the Installation Defaults - AD page, the system can update the recruiting status when the person applies to your institution. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*

By tracking recruiting information at the academic program level, you can designate a recruiting status that is different than the status that is designated at the academic career level.

Status Date

The status date is the system date on the day that you last modified the Recruiting Status field.

Application Number

If the prospect applies to this academic program, the system automatically updates the application number.

Recruiting Center

Select the recruiting center that is responsible for this particular program for the prospect. Define recruiting centers on the Recruiting Center Table page. (user defaults)

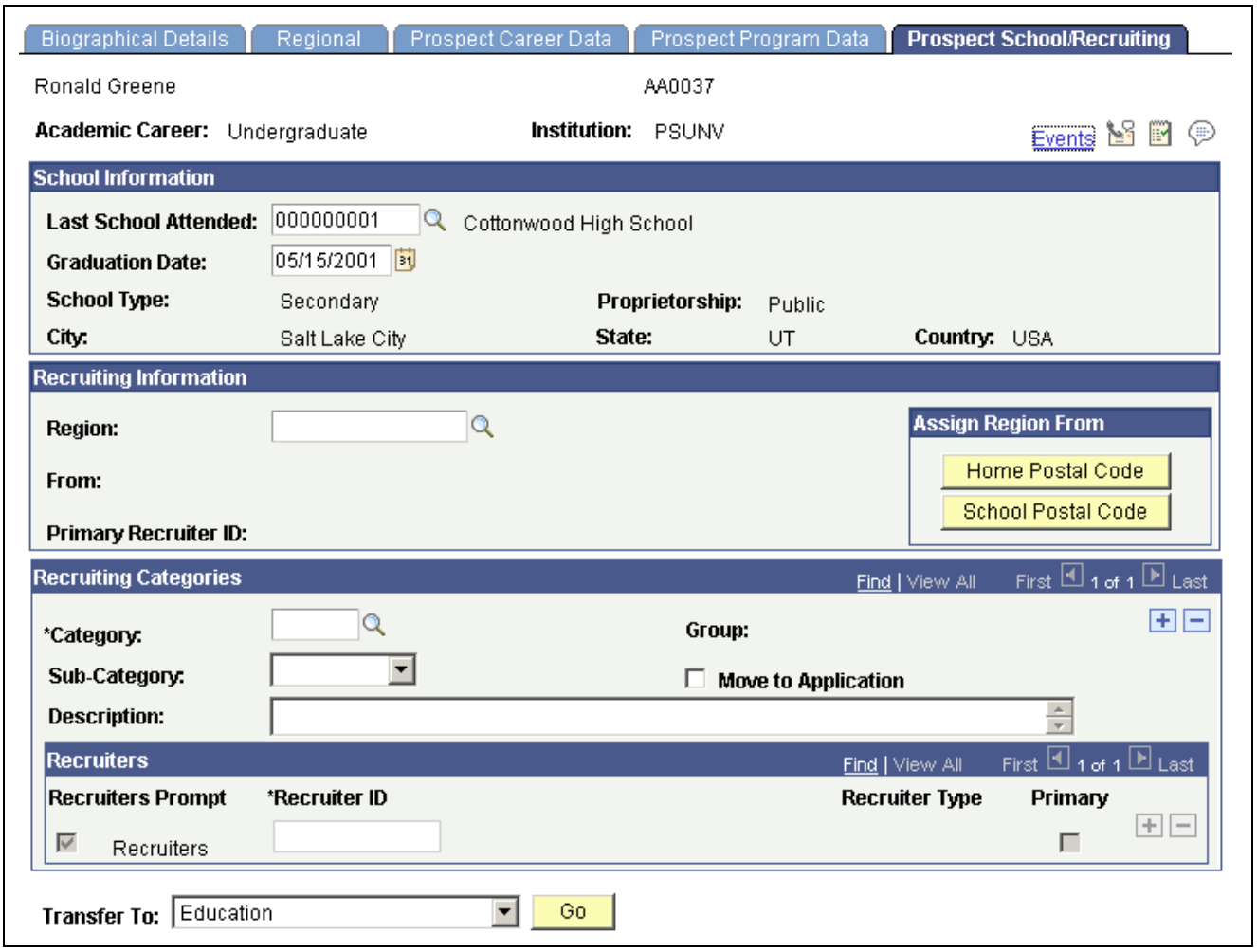
Academic Plan and **Sub-Plan**

Select an academic plan and sub-plan, if known. You can enter multiple academic plans for a program and multiple sub-plans under an academic plan. Define academic plans in the Academic Plan Table component and academic programs in the Academic Program Table component (user defaults).

Note. You can enter multiple program data records or a prospect because a person might be interested in multiple programs within one academic career. Additionally, a prospect can have multiple plans and sub-plans. Add rows to accommodate additional programs, plans, and sub-plans.

Entering and Updating Prospect School and Recruiting Data

Access the Prospect School/Recruiting page.



Prospect School/Recruiting page

Events Click this link to record the events that this prospect attended or was invited to. The Attendee Events Page appears.

School Information

Last School Attended Select the prospect's last school attended. Since a person might attend several schools in his or her external academic career, it is helpful to know which school the person attended most recently. You can use this information to target that school for recruiting visits. Define schools on the Organization Table page. (user defaults).

Graduation Date Select the graduation date from the last school that the person attended. (user defaults).

Recruiting Information

Region You can assign a recruiting region manually or automatically. To manually assign a region, click the prompt on the Region field and select the proper value. Define regions on the Region Table page.

Home Postal Code Click this button to automatically assign the recruiting region, based on the home postal code of the prospect. Assigning recruiting regions based on home address postal codes requires that you define the region tree.

School Postal Code Click this button to automatically assign the recruiting region, based on the postal code of the primary location of the prospect's last school attended. Assigning recruiting regions based on school postal codes requires that you define the region tree.

See Chapter 2, "Building Your Recruiting Structure," Setting Up Your Recruiting Structure, page 7.

From This display-only field shows you how this region was defined:

Region Tree appears if you *manually* assigned a region.

Address appears if you assigned the region when you click the Home Postal Code button.

School appears if you assigned the region when you click the School Postal Code button.

See Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 14.

Recruiting Categories

Category Select a recruiting category for the prospect within this career. In our example, the prospect's sibling attended the institution. Define recruiting categories on the Recruiting Category Table page. Use categories to target and report on students.

You can enter multiple recruiting categories and prospect supporting information for each career.

Note. If you plan to assign a regional recruiter to this prospect, you must enter a category of *REGN* (region).

Sub-Category Select a recruiting subcategory, if known. Subcategories can indicate the priority of this recruiting category. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.*

Group The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the Category field.

Move to Application Select this check box to copy the information in the Recruiting Categories group box to the application record when the prospect applies to your

institution. The system selects this check box if you set up the system to copy prospect data to the application by selecting the Copy Data and Recruiting Categories check boxes on the Installation Defaults - AD page.

Recruiters

Recruiter assignment is tied to recruiting categories. If you entered a recruiting category, the Recruiters group box becomes available. Use this section to assign one or more recruiters to this prospect that are pertinent to this category. You can add multiple recruiters under all categories that you entered.

When selecting recruiters, you might want to see all of the recruiters in your system or only recruiters that are linked to the current recruiting category. The system uses various methods to specify the selection of recruiters when you click the prompt on the Recruiter ID field.

Recruiters Prompt Select this check box if you want *all* recruiters to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned.

Clear this check box to view only those recruiters who are assigned to the current recruiting category to be available when you click the prompt on the Recruiter ID field. The *REGN* (region) category works differently.

If you are adding recruiters for the recruiting category *REGN,* you select only from recruiters in the region that you selected on the Prospect School/Recruiting page. You can enter a region on the Prospect School/Recruiting page manually or automatically. The list of regional recruiters vary, depending on how you defined the region.

If you defined the region according to the last school that the prospect attended, the Recruiters Prompt field displays the recruiters for the school's region. If you click the prompt on the Recruiter ID field, the system displays a list of recruiters that are assigned to that school. If no recruiters are assigned to that school, then you must select a recruiter who is assigned to the region.

If you entered the region according to the prospect's home address, the Recruiters Prompt field displays the recruiters for the address region. If you click the prompt on the Recruiter ID field, the system displays a list of recruiters who are assigned to the region.

If you manually assigned the region from the region tree, the system displays a list all recruiters who are assigned to a recruiting category of *REGN* when you click the prompt on the Recruiter ID field. Click the prompt on the Recruiters field to view the recruiters for the category.

To override the system defaults, select the Recruiters Prompt check box. All recruiters for the academic career are available when you click the prompt on the Recruiter ID field.

Recruiter ID Select the ID of the person to assign to this prospect. You can assign multiple recruiters for any recruiting category to a prospect.

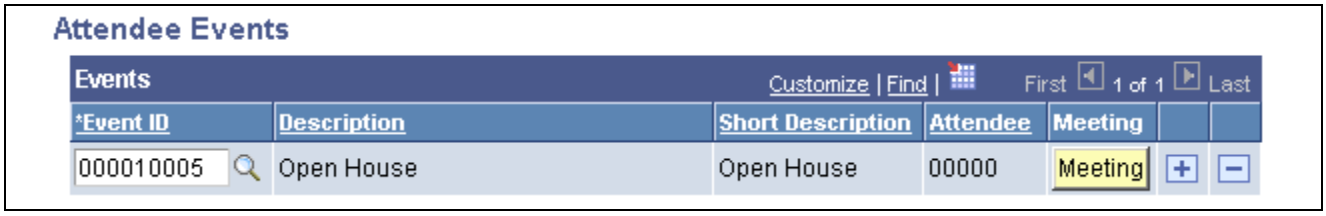
Recruiter Type The recruiter type appears automatically, based on the recruiter ID.

Primary Select this check box if this is the primary recruiter for this academic career. This ID appears on the Prospect School/Recruiting page in the Primary Recruiter ID field. Also, you can enter both primary and non-primary recruiters using this option.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this prospect record.

Tracking Prospects Event Attendance

Access the Attendee Events page.



Attendee Events page

Event ID Select the ID for the event that the prospect is attending (or attended).

Description, Event Type, and **Attendee** The system displays the description, event type, and attendee when you select the event ID.

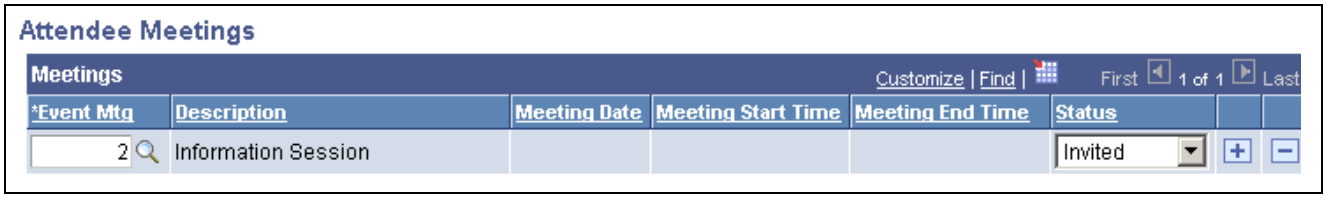
Meeting Click this button to access the Attendee Meetings Page and view a list of meetings or sessions that are associated with this event.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," Creating an Event

Recording Event Meeting Information

Access the Attendee Meetings page.



Attendee Meetings page

Event Mtg (event meeting), **Description, Meeting Date, Meeting Start Time,** and **Meeting End Time** Select the event meeting number. The system displays the event description, meeting date, meeting start time, and automatically when you enter the event meeting number.

Status Enter the attendee's status regarding this meeting. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Attended, Invited, Not Attend,* and *Will Attend.*

Adding Communications, Checklists and Comments for Prospects

The Communication, Checklist and Comment buttons appear next to the Institution field on the Prospect Career Data, Prospect Program Data and Prospect School/Recruiting.

By using the Communication, Checklist and Comment buttons from this component, A new window is opened for the entry pages for communication, checklist, and comments and initiate recruiting and admissions related items.

If the Communication, Checklist or Comments Pages are Accessed From the:	The Variable Data for the Following Administrative Function is Supplied:	Data that is Transferred
Prospect Program Data page	PROP Prospect Program	ID, academic career. academic program, recruiting center.
Prospect Career Data page	PROS Prospect	ID, academic career.
Prospect School/Recruiting page	EVNT Event	ID.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Using the 3C Engine"

Creating Prospects When Posting External Test Scores

You can create prospect records when you post external test scores from the Search/Match/Post Test Scores page. To create prospect records when you post external tests, you must:

1. Load the test scores into a suspense table.
2. Review the suspense table to confirm that the data loaded correctly and make any necessary changes prior to posting.
3. Configure search/match/post parameters and select the options that enable you to create prospect records for all individuals in the test load and run the post process.
4. Run the post process, which creates candidate data records and prospect records for all employee IDs in the test load if they don't already exist.
5. Purge the suspense file.

See Chapter 17, "Processing External Test Scores," Understanding Performing Search/Match and Posting Test Scores, page 294.

Prerequisites

Before you create prospects from test score loads or test queries, you must:

1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure the Ethnicity Mapping page.
5. Configure Test ID mapping options for academic interests, extracurricular activities, and religious preference (optional).
6. Set up data entry defaults for all appropriate users (optional).

See Also

Chapter 5, "Setting Up External Test Score Loads," Mapping External Tests IDs, page 52

Creating Prospects from Test Scores with Query

This section provides an overview and discusses how to:

- Create prospects through a test score load query.
- Select a query.

Understanding Creating Prospects from Test Scores with Query

This option of creating prospects from test scores after they have been posted enables you to define specific criteria using Query Manager to decide for whom you want to create prospects. You can define as many queries as necessary to select the specific population that you want to recruit. To create prospects from a query of previously posted test score records:

1. Create a query.

   Query Manager is under Reporting Tools, Query.
2. Access the Create Prospects from Tests page.
3. Select a test ID, and enter default prospect values.
4. Select the query.
5. Run the process.

To create a query for prospects, you must:

- Select the primary candidate data record for the test ID for which you are creating a query.

When you post external test score data, the system creates candidate data records. It is essential to select the primary candidate data record in your query because the system must use this record to create prospects. The student must have a candidate data record for the test ID on the Create Prospects from Test page to be selected for prospect creation. To find the primary candidate data record for a given test, navigate to the External Test Score Mapping page. You can use any additional records from the system to further define the candidates for whom you want to create prospect records. For example, you could add the Test Component record (STDNT_TEST_COMP) to your query to select only students with an ACT Candidate Date record who have an ACT Composite score greater than 24.

- Employee ID must be the first field that is listed on the Fields page in PeopleSoft Query Manager. You can select additional fields to enhance the results of your query as long as the Employee ID is the first field that is listed.

Note. Check the results of your query in PeopleSoft Query Manager before you run the query on the Create Prospects from Test page to ensure you are using the correct population.

To assist you in creating your queries, PeopleSoft delivers the following queries as examples in the demo database: PS_AD_ACT_CPTEST02 , PS_AD_ACT_CPTEST03, PS_AD_ACT_CPTEST04, PS_AD_AP_CPTEST01, PS_AD_AP_CPTEST02, PS_AD_GMAT_CPTEST01, PS_AD_GRE_CPTEST01, PS_AD_LSAT_CPTEST01, PS_AD_SAT_CPTEST01, PS_AD_SAT_CPTEST02, PS_AD_SAT_CPTEST03, PS_AD_SAT_CPTEST04

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query

Prerequisites

Before you create prospects from test score post or test scores using queries, you must:

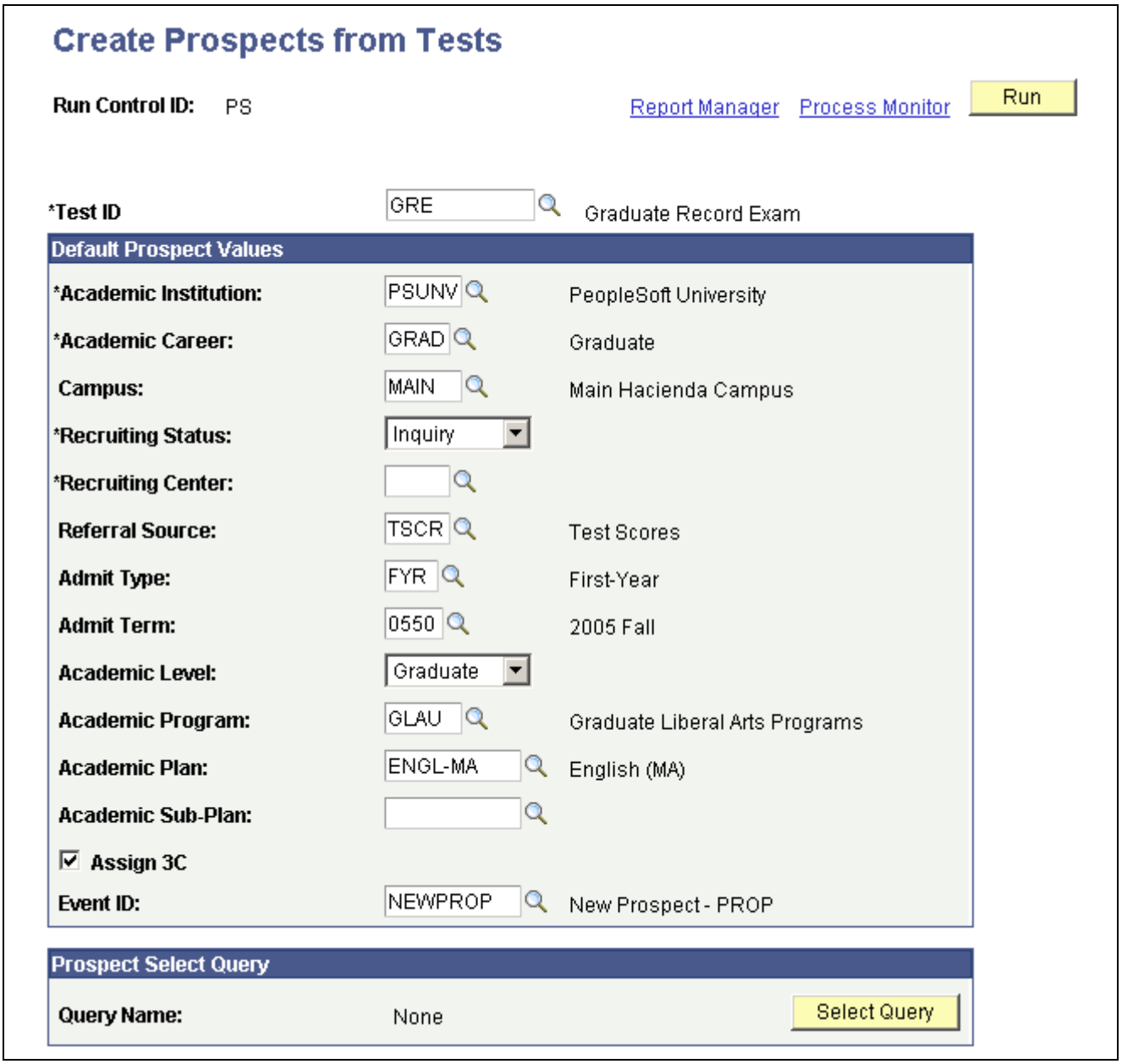
1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure Ethnicity Mapping.
5. Post test score data.
6. Configure Test ID mapping options for academic interests, extracurricular activities, and religious preference (optional).

Pages Used to Add Prospects From Test Scores Using Query

Page Name	Object Name	Navigation	Usage
Create Prospects from Tests	SAD_PRS_CREATE	• Student Admissions, External Test Score Processing, Create Prospects From Tests • Student Recruiting, External Test Score Processing, Create Prospects From Tests	Create prospects from external test loads by querying the primary candidate date records that have been created through external test loads.
Select Query	SAD_QRY_SELECT	Click the Select Query button on the Create Prospects from Tests page.	Select a query of external test data to create prospects from test loads.

Creating Prospects by Querying External Test Loads

Access the Create Prospects from Tests page



Create Prospects from Tests page

Additional Elements

Test ID

Enter the test ID for the query you want to run. When you search for a query on the Select Query page, the system searches for valid queries for the test ID that you enter. A valid query is set up to search the primary candidate data record for this test where the employee ID is the first field that you select. The system identifies the primary candidate data record from the External Data Mapping page.

For example, when you enter ACT and then click the Select Query button, the system accesses the External Data Mapping page and locates the primary candidate data record for ACT, which is SAD_ACT_CD. When you click Search from the Select Query page, the system returns only those queries that have SAD_ACT_CD selected. In other words, the system returns the

valid queries for the ACT test ID by accessing the candidate data record on the External Data Mapping page.

Default Prospect Values

Select the default values to assign to the prospects that you create from the query. For example, if you select *UGRD* in the Academic Career field, the system assigns every prospect it creates to the undergraduate academic career. To create prospects, you must enter an academic institution, academic career, recruiting status, and recruiting center. In certain circumstances, you might also want to assign additional information, such as academic program and plan, and admit term, when your test load contains a specific set of prospects.

Academic Program Because the Academic Program table is keyed by admit term, you must select an admit term to select an academic program.

Assign 3C Select this check box to assign 3Cs to the prospects that you create from the query. When you select this option, the Event ID field becomes available.

Event ID Assign an event ID to the prospects that you create from the query. Only the event IDs that have the administrative functions PROS (prospect) and PROP (prospect program) are available. Prospect program is available only if you select an academic program on this page. Define event IDs on the Event Definition page.

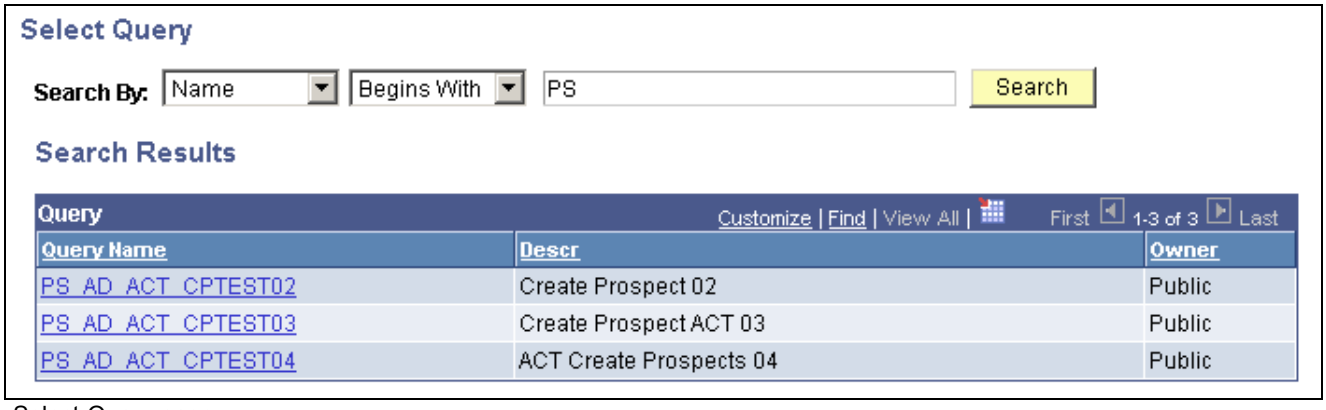
See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Using the 3C Engine," Defining 3C Engine Events.

Prospect Select Query

Select Query Click the link to access the Select Query page. You must select a query before you click the Run button.

Selecting a Query

Access the Select Query page.



Select Query page

When you click the Search button, the system searches for the test ID that you entered on the Create Prospects from Tests page. A valid query searches the primary candidate data record for the specified test where the employee ID is the first field you select. The system identifies the primary candidate data record from the External Data Mapping page.

In addition, you can view only those queries to which you have access. Queries can be marked private or public. You can view all public queries; however, you cannot view private queries if you are not listed as the owner even though the private queries fit the criteria for the test.

Note. When you click Search, the system evaluates every query to which you have access for the primary candidate data record. Because the system searches all queries to which you have access, leaving the search string blank might increase your wait time.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query

Adding Prospects Through a System-wide Query

Access the Create Prospects from Query page.

Understanding Queries and Prospect Creation

You can create prospect records for anyone in your system who does not already have a prospect record. To create prospect records through a system-wide query:

1. Create one or more queries based on the demographic information for which you want to create prospects.
2. Define default prospect data for the prospects that the system creates on the Create Prospects from Query page.
3. Select and run the query that you created from the Create prospects from Query page.

You can create your query to search any record in your system that has an employee ID or ID field. When you define your query, you can set certain criteria that identifies the demographic that you want to target. For example, a medical school might create prospects for all currently enrolled senior biology majors with GPAs equal to or greater than 3.8 for recruitment purposes. To do this, you must define a query that searches the ACAD_PROG, ACAD_PLAN, and STDNT_CAR_TERM tables.

Warning! Use caution with whom grant access to the Create Prospects from Query page. Anyone with access to this page can view public queries in the system. Users can also define their own queries to search for any record in your database that has an employee ID or ID field.

See Also

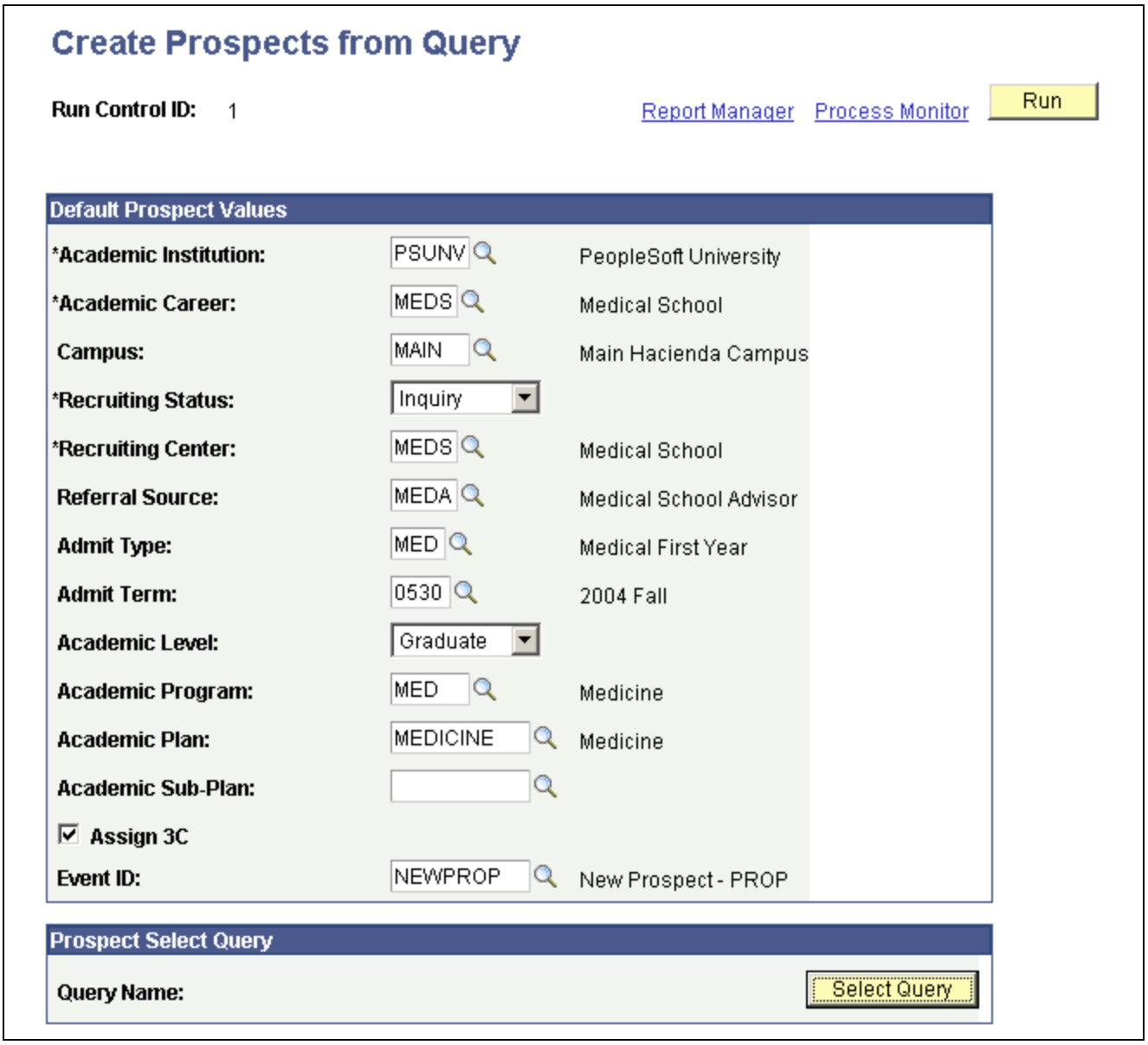
Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query

Pages Used to Add Prospects Through a System-wide Query

Page Name	Object Name	Navigation	Usage
Create Prospects from Query	SAD_PRS_CREATE	Student Recruiting, Maintain Prospects, Create Prospects from Query	Create prospects from any record in your database through a system-wide query.
Select Query	SAD_QRY_SELECT	Click the Select Query button on the Create Prospects from Query page.	Select the query that you created to create prospects from records that contain employee ID or ID fields and in which the employee ID is the first field selected.

Adding Prospects Through a System-wide Query

Access the Create Prospects from Query page.



Create Prospects from Query page

Select the default values to assign to the prospects that you create from the query. For example, if you select *UGRD* in the Academic Career field, the system assigns every prospect it creates to the undergraduate academic career. To create prospects, you must enter an academic institution, academic career, recruiting status, and recruiting center. In certain circumstances, you might also want to assign additional information, such as academic program and plan, and admit term, when your test load contains a specific set of prospects.

Selecting a Query

Access the Select Query page.

See Also

Chapter 9, “Recruiting Prospective Students,” Selecting a Query, page 102

Viewing Prospect Information

This section discusses how to view prospect information.

Pages Used to View Prospect Information

Page Name	Object Name	Navigation	Usage
Prospect Summary	ADM_PRSPCT_SUMM	Student Recruiting, Prospect Summaries, Prospect Summary	View a summary of information about a prospect, such as academic career, recruiting status, and referral source. You can also view whether or not this prospect has applied.
Prospect Programs	ADM_PRSPCT_S_SEC	Click the Program link on the Prospect Summary page. This link appears if you have entered academic program data for this prospect.	View information about a prospect's academic career. You can click the Detail Panel link to access the person's Prospect Career Data page at the row for this academic career.
Prospect Recruiters	PRSPCT_RCR_SUMMARY	Student Recruiting, Prospect Summaries, Prospect Recruiters Summary	View a list of a prospect's recruiters for an academic career.

Assigning Regions, Recruiting Categories, and Recruiters on a Mass Basis

This section provides an overview and discusses how to:

- Use general criteria to select the prospect group.
- Use academic criteria to select the prospect group.
- Use program and plan criteria to select the prospect group.
- Use academic interests criteria to select the prospect group.
- Assign regions, recruiters, and recruiting categories to the prospect group.

Understanding the Assignment of Regions, Recruiting Categories, and Recruiters on a Mass Basis

Use the Assign Recruiters component to assign regions, recruiting categories, and recruiters to a *group* of prospects at the same time. You can select the group of prospects based on selection criteria, including:

- Biographical and demographic data, such as gender, ethnicity, and citizenship.
- Address data, such as state and postal codes, or a range of postal codes.

- Geographic region, based on last school attended, prospect's home address, or the region tree.
- Academic institution, last school attended, academic career, program, plan, and campus.
- Recruiting status and recruiting center.
- Other items, such as referral source, academic interest, housing interest, and financial aid interest.

You can assign regions, recruiting categories, and recruiters to prospects based on one or more of the fields on these pages. For example, you can define only one field, such as Country, and select all prospects in the U.S. Conversely, you can use multiple selection criteria fields to capture a specific prospect group. For example, you can select all Native American females whose home address is within postal code 10990, with a certain academic career and academic program, and who have an academic interest in law with a priority ranked between 1 and 5. Use additional selection criteria fields to narrow the group of prospects for assignment to a region, recruiting category, and recruiter.

See Also

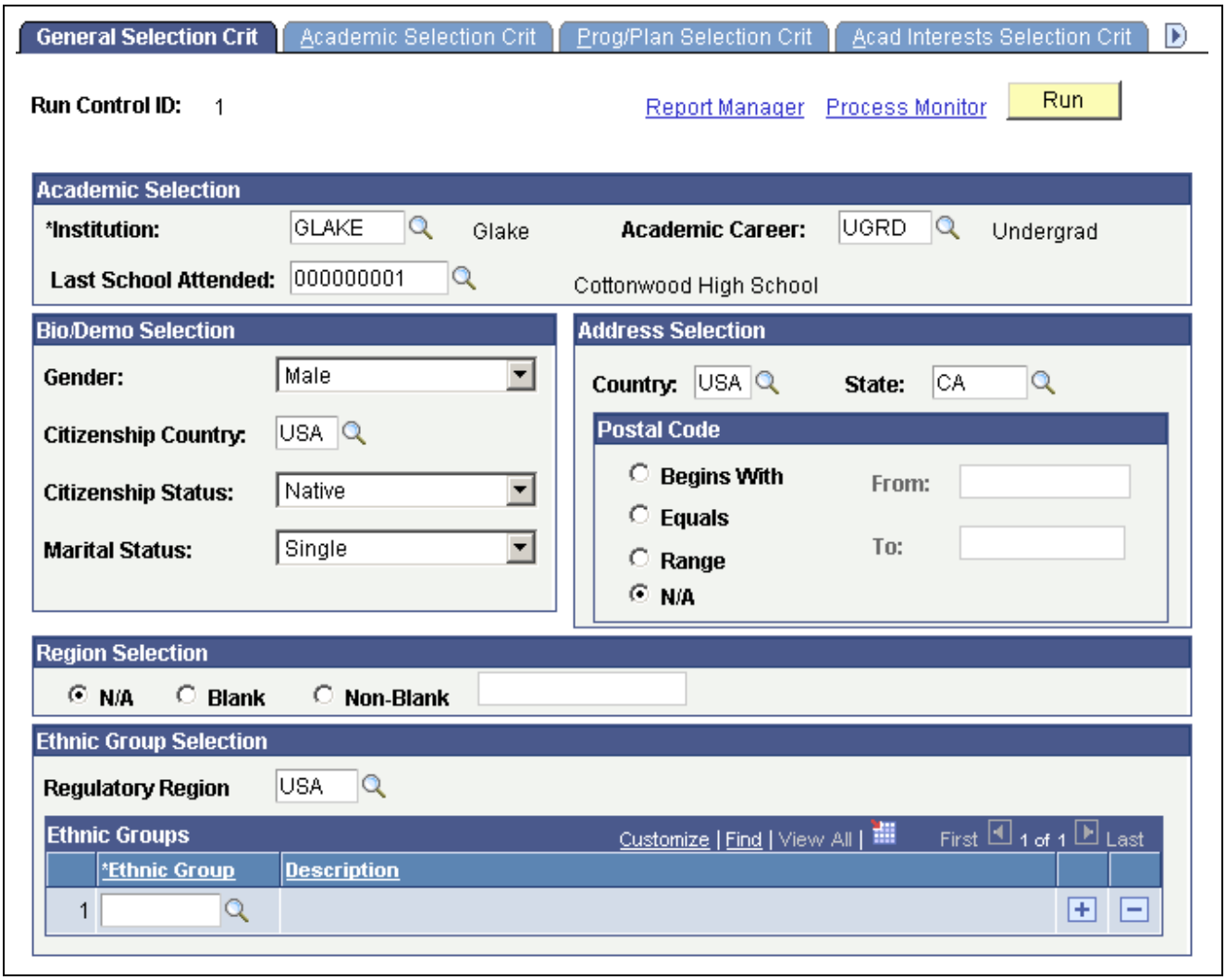
Chapter 9, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 88

Pages Used to Assign Regions, Recruiting Categories, and Recruiters on a Mass Basis

Page Name	Object Name	Navigation	Usage
General Selection Crit (general selection criteria)	ADM_PERS_CAR_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment	Use the General Selection Crit (general selection criteria) page to specify the prospect group for which you want to assign regions, recruiting categories, and recruiters.
Academic Selection Crit (academic selection criteria)	ADM_CAR_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Academic Selection Crit	Enter any academic selection criteria for the prospect group.
Prog/Plan Selection Crit (program or plan selection criteria)	ADM_PROGRAM_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Prog/Plan Selection Crit	Enter any academic program or academic plan selection criteria for the prospect group.
Acad Interests Selection Crit (academic interests selection criteria)	ADM_INTEREST_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Acad Interests Selection Crit	Enter any subject area selection criteria for this prospect group. You can select people for prospect groups that have expressed an academic interest in certain subject areas if you want to assign regions, recruiting categories, and recruiters based on this criteria.
Assignment Crit (assignment criteria)	ADM_RECRREGN_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Assignment Crit	Assign regions, recruiting categories, and recruiters to the prospect group.

Using General Criteria to Select the Prospect Group

Access the General Selection Crit (general selection criteria) page.



General Selection Crit page

Note. To select a person for a prospect group, that person must meet all of the criteria that you define on this page. For example, you can select a female from Cottonwood High School with an admit term of spring 2001 and an academic load of Full Time. The system selects only persons to whom *all* of these conditions apply. This is an example of AND logic. Contrast this with the discussion of OR logic in the Program Data group box on the Prog/Plan Selection page.

Academic Selection

Institution and **Academic Career**

Enter the academic institution and career and for this prospect group.

If you do not select an academic institution and an academic career, no prompt values exist for fields such as admit term, admit type, and referral source on the Acad Interests Selection Crit (academic interests selection criteria) page and the Program/Plan Selection Crit (program or plan selection criteria) page.

Last School Attended

Select the last school attended to assign regions, recruiting categories, and recruiters based on this criterion.

Bio/Demo Selection

Gender Select *(none), Female, Male,* or *Unknown* to assign regions, recruiting categories, and recruiters based on this criterion.

Citizenship Country Select a county of citizenship.

Citizenship Status Select a citizenship status to assign regions, recruiting categories, and recruiters based on this criterion. You must specify a country of citizenship for values to exist for this field.

Marital Status Select a marital status to assign regions, recruiting categories, and recruiters based on this criterion.

Address Selection

Country and **State** Select the country and state to assign regions, recruiting categories, and recruiters based on these criteria.

Postal Code

Complete field in this group box to select a prospect group from a certain postal code or postal code range. Select the appropriate option, depending on how you want to select by postal code. Only one of these options can be selected.

Begins With and **From** Select a prospect group by defining a beginning postal code. Enter the beginning postal code in the From field. For example, use this option if one prospect has a five-digit postal code (90068) and another prospect has a nine-digit version of the postal code Using a postal code that begins with 90068 finds both prospects.

Equals Select this option to choose a prospect group by a specific postal code. Enter the postal code in the From field.

Range, From, and **To** Select *Range* to select a prospect group by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.

N/A Select *N/A* if you do not want to use a postal code in your selection criteria for this prospect group. This is the default setting.

Region Selection

Complete fields in this group box to define how you will select this prospect group if you want to assign regions, recruiting categories, and recruiters based on this criterion.

N/A Select this option if you do not want to use region in your selection criteria for this prospect group.

Blank Select this option to select people for a prospect group who do not have a region assigned.

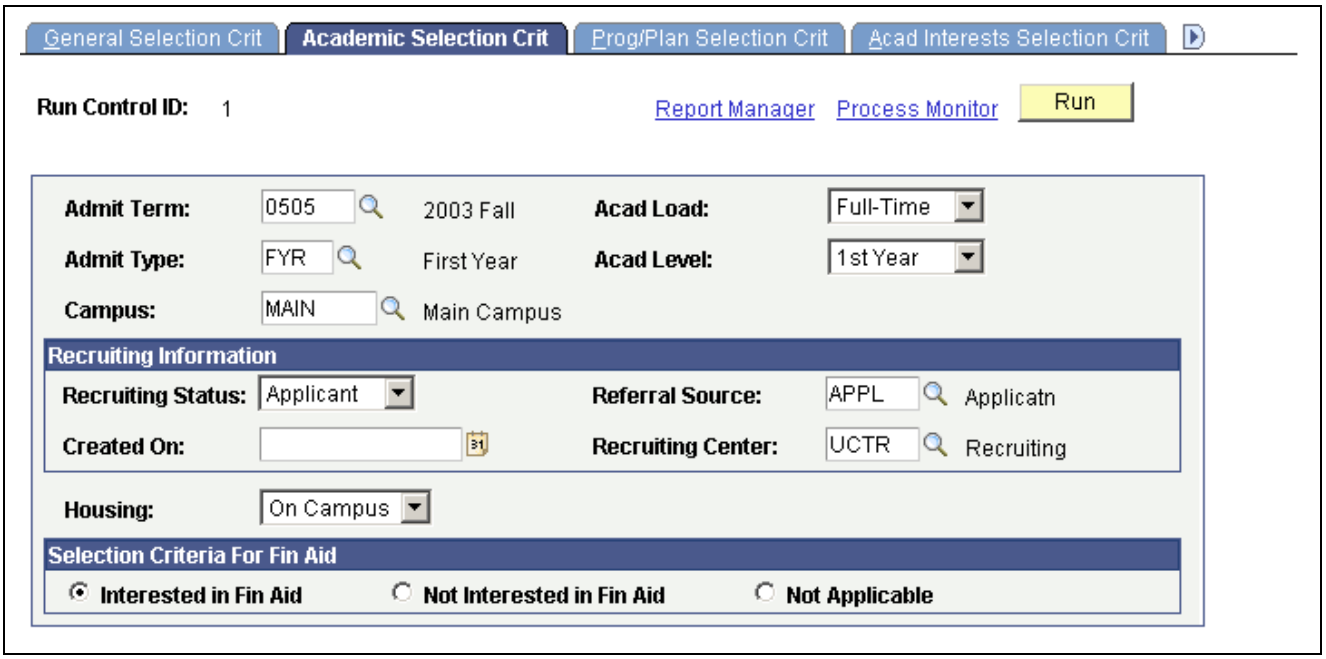
Non-Blank Select this option to select prospects who have been assigned a geographical region.

Ethnic Group Selection

Complete fields in this group box if you want to assign regions, recruiting categories and recruiters to a group of prospects based on specific ethnic groups. Regulatory Region: Select the region the ethnic groups are defined for. Once this field is populated, the ethnic group field will appear. Ethnic Group: Select one or more ethnic groups to assign regions, recruiting categories, and recruiters based on this criterion. The values for this field will vary based on the regulatory region entered.

Using Academic Criteria to Select the Prospect Group

Access the Academic Selection Crit (academic selection criteria) page.



Academic Selection Crit page

Admit Term Select the admit term for this career and prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career n the General Selection Crit page.

Admit Type Select the admit type for this career to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career on the General Selection Crit page.

Campus Select a campus to assign regions, recruiting categories, and recruiters based on this criterion.

Acad Load (academic load) Select the appropriate academic load for this career to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career entered on the General Selection Crit page.

Acad Level (academic level) Select an academic level for this career to assign regions, recruiting categories, and recruiters based on this criterion.

Note. If you have not selected an academic institution and an academic career on the General Selection Crit page, there are no prompt values for these fields.

Recruiting Status Select the recruiting status to assign regions, recruiting categories, and recruiters based on this criterion.

Created On Enter the date that prospect records were created to assign regions, recruiting categories, and recruiters based on this criterion.

Referral Source Select the referral source to assign regions, recruiting categories, and recruiters based on this criterion.

Recruiting Center Select the recruiting center to which prospects in this career are assigned to assign regions, recruiting categories, and recruiters based on this criterion.

Housing Select a housing interest for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion.

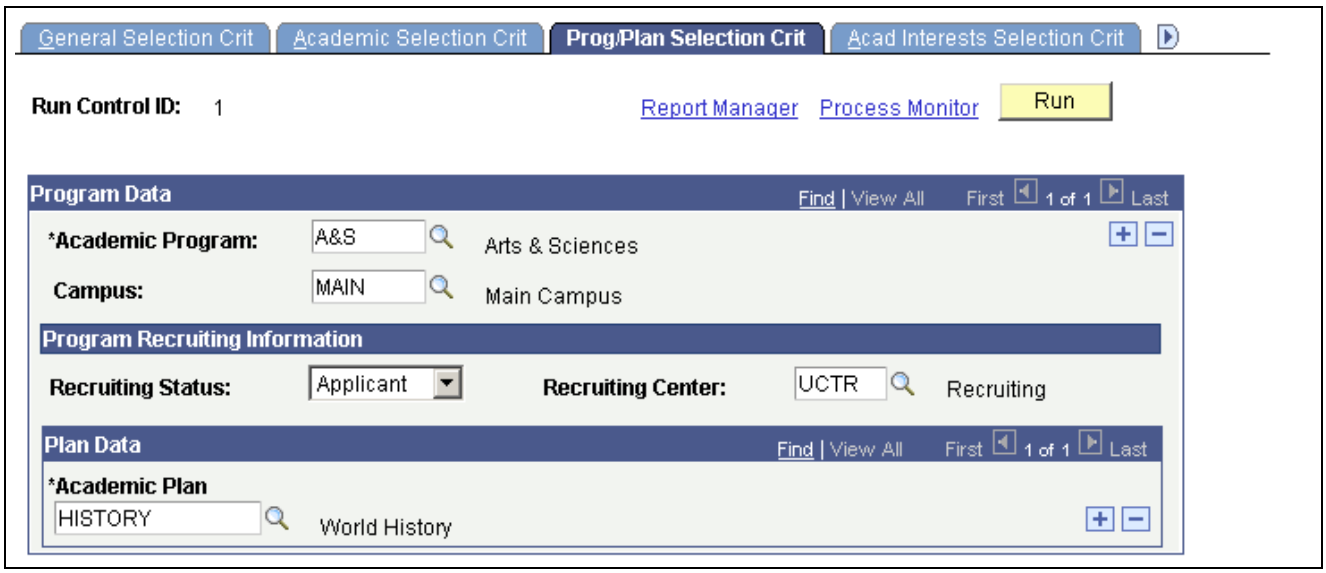
Interested in Fin Aid (interested in financial aid) Select this option to select a prospect group by those who indicate an interest in financial aid.

Not Interested in Fin Aid (not interested in financial aid) Select this option to select a prospect group by those who have specified that they are not interested in financial aid.

Not Applicable Select this option to selects a prospect group regardless of their expressed interest in financial aid. This is the default setting.

Using Program and Plan Criteria to Select the Prospect Group

Access the Prog/Plan Selection Crit (program or plan selection criteria) page.



Prog/Plan Selection Crit page

Academic Program Select an academic program for this prospect group. Valid values depend upon the academic institution and career that you select on the General Selection Crit page. You can select more than one academic program. If you enter more than one academic program (for example, Liberal Arts and Fine Arts) people who are in either the Liberal Arts or the Fine Arts academic programs are selected for this prospect group. Whenever you see a scrollable field (First-Next-Previous-Last links) in this component, the OR logic applies; that is, one or the other must be true for that person to be selected. Contrast

this to the AND logic discussed in “Using General Criteria to Select the Prospect Group."

Campus Select a campus for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic program selected.

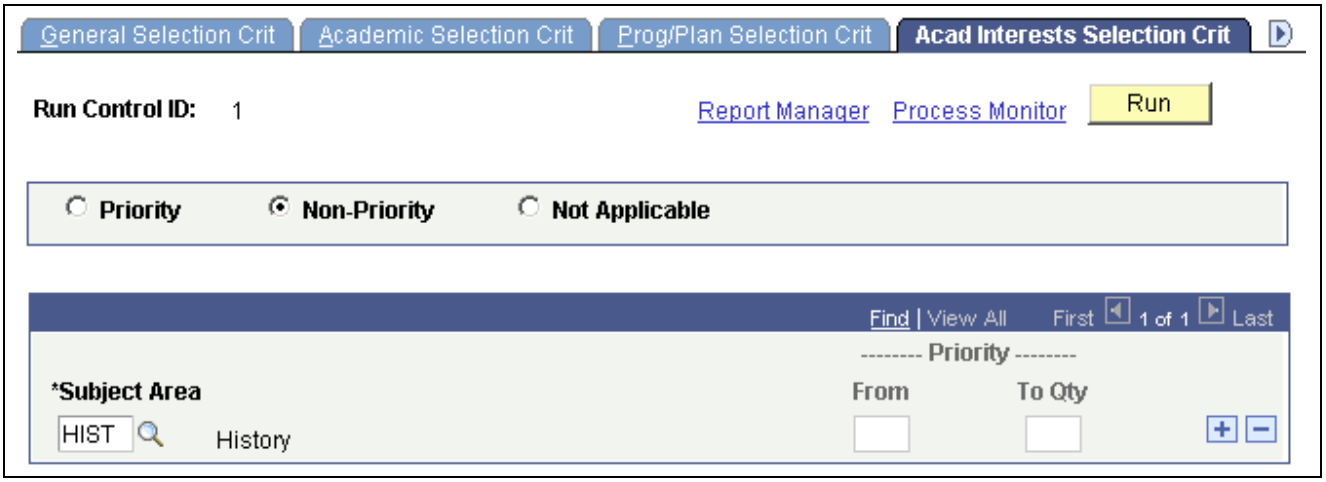
Recruiting Status Select a recruiting status for this academic program if you want to assign regions, recruiting categories, and recruiters based on this criterion.

Recruiting Center Select a recruiting center for this academic program to assign regions, recruiting categories, and recruiters based on this criterion. Valid values depend upon the academic career you select and are subject to the user security established for recruiting centers.

Academic Plan Select an academic plan for the academic program in the Academic Program field to assign regions, recruiting categories, and recruiters based on this criterion. You can enter more than one academic plan. If you enter one academic plan, a person must have that plan to be selected for this prospect group. If you enter more than one academic plan, a person must have only *one* of the plans that you enter to be included in this prospect group.

Using Academic Interests Criteria to Select the Prospect Group

Access the Acad Interests Selection Crit (academic interests selection criteria) page.



Acad Interests Selection Crit page

Priority Select this option to select prospects who have expressed a prioritized interest in certain subject areas.

Non-Priority Select this option to select prospects who have not expressed a prioritized interest in certain subject areas.

Not-Applicable Select this option to select prospects regardless of their expressed interest in any subject area. This is the default option.

Subject Area Select individuals for a prospect group who have expressed an academic interest in a common subject area. This field is optional and is based on the options that you selected *(Priority, Non-Priority,* or *Not-Applicable)*. You can enter more than one subject area. For example, suppose you enter *English* and *Math* as subject areas. The system selects those people who have expressed

an interest in either English or Math for this prospect group. Therefore, the OR logic applies; one or the other must be true for that person to be selected. Contrast this to the AND logic discussed in the Bio/Demo Selection group box on the first page in this component.

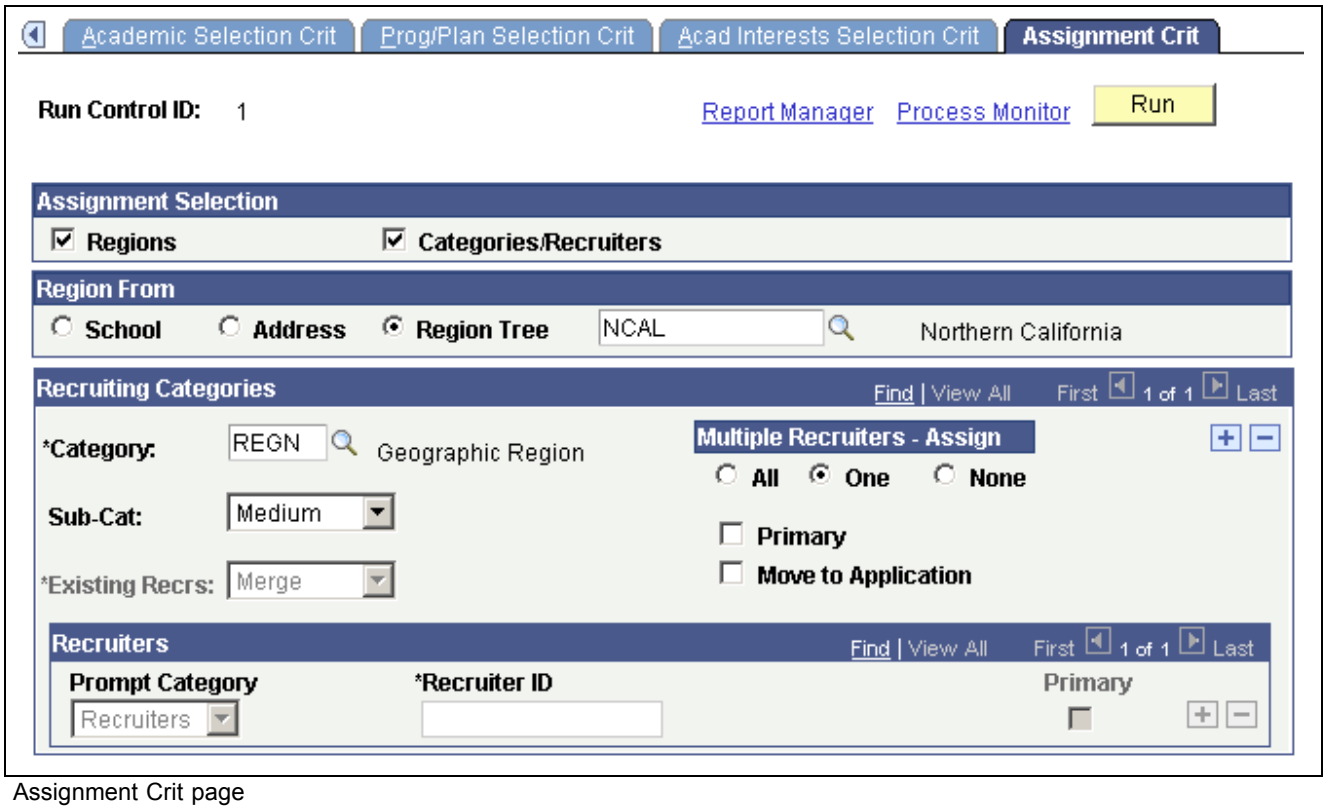
From and **To** — Enter an academic interest priority range. For example, you can select people for this prospect group who have expressed an interest in pre-law as their first or second interest choice. These fields are relevant only if you selected the Priority option.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Pages Used to Track Supporting Information for Prospects and Applicants, page 118

Assigning Regions, Recruiters, and Recruiting Categories to the Prospect Group

Access the Assignment Crit (assignment criteria) page.



Assignment Crit page

Assignment Selection

Regions and **Categories/Recruiters** — Select the criteria for processing this prospect group, such as assign regions to the prospect group; assign recruiting categories and recruiters to the prospect group. Alternately, you can select both the options assign regions, recruiting categories, and recruiters to the prospect group. The system selects both check boxes by default.

Region From

You can automatically or manually assign a region for the individuals in this prospect group. These fields are only relevant if you select the Regions check box.

School Select this option to automatically assign a region for this prospect group, based on the primary location postal code of the school that the prospect last attended.

Address Select this option to automatically assign a region for this prospect group, based on the home address postal code of the prospect.

Region Tree Manually assign a region for this prospect group when you click the prompt on the Region field. Select a region from the list.

Important! If you plan to assign a regional recruiter to this prospect, you must enter a category of *REGN* (region) in the Category field.

Recruiting Categories

Complete the fields in this group box to assign recruiting categories to the prospect group. Use recruiting categories to target a prospect group for special attention during the recruiting and admissions business process.

Category Select a recruiting category for this prospect group (for example, *HTST* (high test scores). You can assign multiple recruiting categories. Define recruiting categories on the Recruiting Category Table page. Use these categories in the recruiting and application processes to target and report on students.

Sub-Cat (sub-category) Select a recruiting sub-category, if known. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.* You can use a sub-category to indicate the priority of this recruiting category.

Existing Recrs (existing recruiters) Select an option for handling existing recruiters for people in this prospect group. You can merge them or replace them with the recruiters that you are currently assigning. The system selects *Merge* by default.

Move to Application Select this check box to carry forward the recruiting categories to the application records when individuals in this prospect group apply to your institution. However, you must set up your installation defaults to allow the system to copy the recruiting category. Select the Recruiting Categories check box on the Installation Defaults - AD page.

Multiple Recruiters - Assign

This group box becomes active when you assign recruiters to prospects by the region category.

All Select this option to assign to this prospect group all of the region's recruiters in the region that you define.

One Select this option to assign to this prospect group one of the region's recruiters in the region that you define. The system assigns the first recruiter who is assigned to this recruiting category.

None Select this option to assign no recruiters if there are multiple recruiters for this category.

Recruiters

Prompt Category Use this field to assign recruiters to the prospect group for all recruiting categories other than *REGN*. Select *Categories* to view the list of recruiters for the category in the Recruiting Categories group box. Select *Recruiters* to display a list of all recruiters, regardless of their category.

If you chose the *REGN* category, the Recruiting Categories and Recruiters group boxes become unavailable.

Recruiter ID Select a recruiter ID for the prospect group. The list of recruiters that appears depends on what you entered in the Prompt Category field.

Primary Select this check box if you want to designate the recruiter as the primary recruiter.

Note. Save the page before you click the Run button.

Click Run to run this request at user-defined intervals.

CHAPTER 10

Tracking Supporting Prospect and Applicant Information

This chapter lists prerequisites and discusses how to:

- Track supporting information for prospects and applicants.
- View event and meeting summary information.
- View schools by groups.
- View an account summary.

Note. PeopleSoft Recruiting and Admissions shares functionality with PeopleSoft Campus Community. For this reason, many of the pages covered in this chapter are documented in their entirety in *PeopleSoft Campus Community.*

Prerequisites

Before you begin entering supporting information for a prospect or applicant, you must enter prospects and applicants into your database.

See Also

Chapter 14, "Adding and Updating Applications," page 171

Chapter 9, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 88

Tracking Supporting Information for Prospects and Applicants

This section discusses how to track and view the following information for prospects and applicants:

- Academic interests.
- Electronic addresses.
- Extracurricular activities.
- Honors and awards.
- Languages.
- Names.

- Publications.
- Relations with your institution.
- Relationships.
- Residency data.
- Student group involvement.
- Work experience.
- Test results.
- Test summary information.

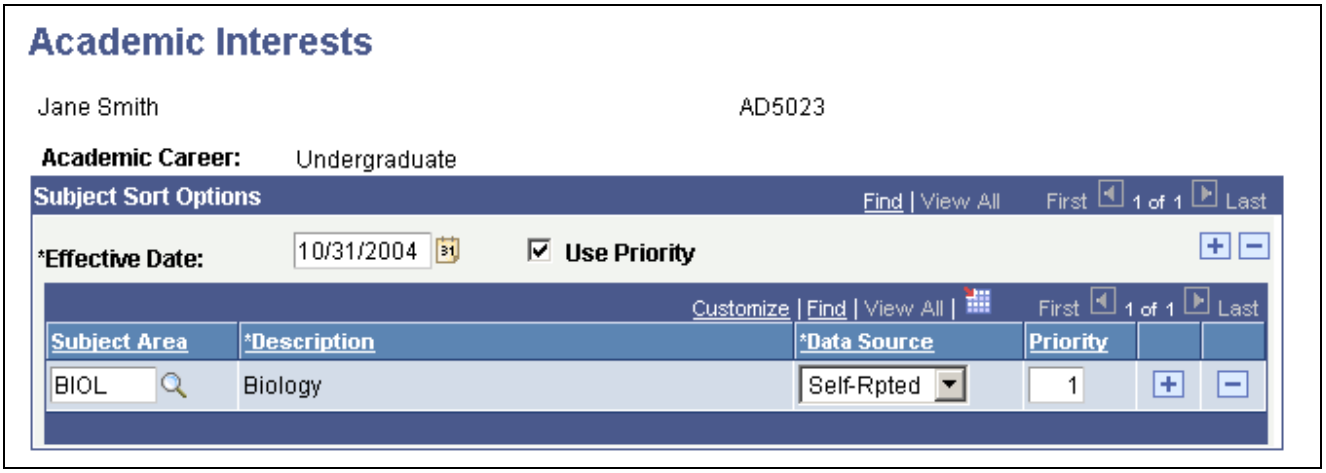
Pages Used to Track Supporting Information for Prospects and Applicants

Page Name	Object Name	Navigation	Usage
Academic Interests	ADM_INTERESTS	• Student Recruiting, Maintain Prospects, Academic Information, Academic Interests • Student Admissions, Application Entry, Academic Information, Academic Interests	Record a person's external subject areas of interest, whether your institution offers them. You can also record the person's level of academic interest. For example, Pre-Law could be a person's first priority and Technology could be the person's second priority. You can use this information for recruiting purposes by determining what areas you offer that are similar to the person's preferences. This information is also valuable for reporting and academic program planning purposes.
Test Results	STDNT_TEST_SCORE	• Student Recruiting, Maintain Prospects, Academic Information, Test Results • Student Admissions, Application Entry, Academic Information, Test Results • Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results • Records and Registration, Transfer Credit Evaluation, Test Results	Enter test scores and related test information for a person manually. You can also load various test information into this page through an external test score load. Test results are stored under a person's name and can be used when evaluating any application for the person. Link test scores to an application on the Application Materials page.

Page Name	Object Name	Navigation	Usage
Test Summary	STDNT_TEST_SUMMARY	• Student Recruiting, Prospect Summaries, Academic Test Summary • Student Admissions, Applicant Summaries, Academic Test Summary • Records and Registration, Transfer Credit Evaluation, Academic Test Summary • Student Recruiting, External Test Score Processing, Academic Test Summary or Student Admissions, External Test Score Processing, Academic Test Summary	View a summary of academic test information for prospects and applicants. This page includes information such as test score and data source.

Tracking Academic Interests for Prospects and Applicants

Access the Academic Interests page.



Academic Interests page

Effective Date Enter the effective date if it is different than the current date. The current date is the default. The effective date defines when the information you enter is valid.

Use Priority Select this check box to prioritize a person's academic interests.

The default for this field is selected if you enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.

Subject Area Select a subject area. Define external subject areas on the External Subject Table page.

Description The description for this subject appears.

If the person expressed an interest for which no subject area code is defined, leave the Subject Area field blank and enter a free-form.

Data Source	Select how this information was provided to your institution. For example, you might have received this information directly from the applicant or through a data load. Values for this field are delivered with your system as translate values. You can modify these translate values.
Priority	Enter a priority level (for example *1, 2, 3,* and so forth). *1* is the highest priority. The default for this field is selected if you have enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.
Go	Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Tracking Electronic Addresses for Applicants

Use the Electronic Addresses page to enter or update electronic addresses for a person.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Understanding Campus Self Service".

Tracking Extracurricular Activities for Prospects and Applicants

Use the Extracurricular Activities page to record information regarding a person's external interests.

Tracking Honors and Awards for Prospects and Applicants

Use the Honors and Awards page to record a prospect's or applicant's honors and awards. For example, an external honors could be National Merit Finalist or Valedictorian. Internal honors and awards could be a scholarship for an incoming applicant or the Dean's List for a matriculated student.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Tracking Student Data," Tracking Honors and Awards

Tracking Languages for Prospects and Applicants

Use the Languages page to enter, update, and view language proficiency information.

Tracking Names for Prospects and Applicants

Use the Names page to enter, update, and review name information. You can store various names for a person, such as their primary name, preferred name, former name, maiden name, and so on. You can also search on these names using the Search/Match feature. When generating letters, you can specify the specific name that you want to use.

See Chapter 9, "Recruiting Prospective Students," Entering and Updating Prospect Biographical Details, page 89.

Tracking Publications for Prospects and Applicants

Use the Publications page to enter, update, and review publication information. For example, a person might have written a book, produced a video, or published a thesis.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Participation Data," Entering Publications Data

Tracking Relations with Your Institution for Prospects and Applicants

Use the Relations With Institution page to enter, update, and review information regarding relationships a person has with your institution. The status you designate here is reflected on the Search/Match Results page. There is a mass change definition delivered with your system that can update and move multiple peoples' status as a background process.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Managing Relationships Data

Tracking Relationships for Prospects and Applicants

Use the Relationships page to enter, update, and review information regarding relationships a prospect or applicant has with any person in your database. For example, a prospect or applicant could have a friend or a relative in the database. The Relationships page can store data for people who already exist in the system (those who have an ID) or for people who do not exist in the system. If you enter information on this page for people who do not exist in the system, the system creates a new ID.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Managing Relationships Data

Tracking Residency Data for Prospects and Applicants

Use the Residency Data component to enter, update, and review residency information for a person.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Identification Data," Entering Residency Data

Tracking Student Group Involvement for Prospects and Applicants

Use the Student Groups page to enter any student groups that your institution has defined to which this person belongs.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Tracking Student Data," Tracking Student Groups

Tracking Work Experience for Prospects and Applicants

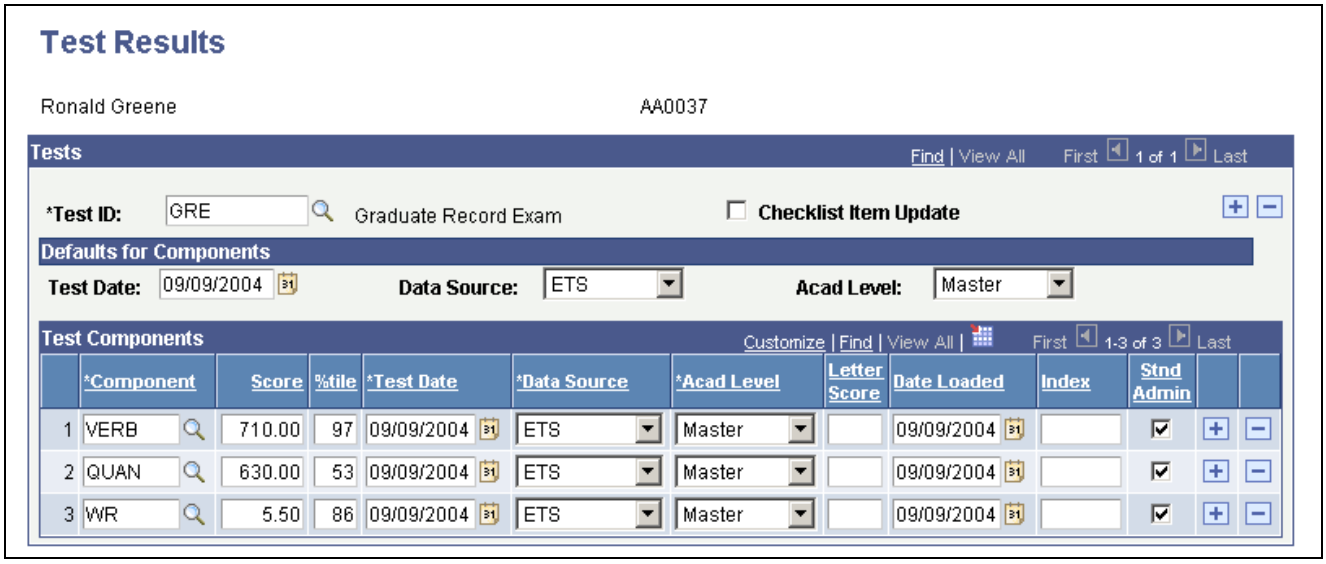
Use the Work Experience page to enter, update, and review work experience information you might have for a person.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Tracking Work Experience

Tracking Test Results for Prospects and Applicants

Access the Test Results page.



Test Results page

Test ID Select the test you are recording. Define tests on the Test Tables page.

Checklist Item Update Select this check box to indicate that the checklist related to this row of data is updated when you run the Checklist Item Update Automated process. When you save the page, the system selects this check box automatically. To clear this check box, save the page, clear the check box, then save the page again.

Test Date Enter the date on which this test was taken. The value you enter here populates the corresponding field in the bottom region of the page.

Data Source Select how this test information was reported. For example, the data could have been self-reported or received from a testing agency. The value you enter here populates the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level) Select the applicant's academic level at the time this test was taken. This level can be different from the applicant's current level. The value you enter here defaults to the corresponding field in the bottom region of the page. Values for this field are delivered with your system as translate values. You can modify these translate values.

Component Select the first test component. Values for this field are determined by the test ID that you enter. Define test components on the Test Component Table page and link them to tests on the Test Tables page.

Score %tile (score percentile) Enter the score, percentile, or both for this test component.

Test Date The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the date if necessary.

Data Source The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.

Acad Level The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.

Letter Score Enter a letter score for this test component, if applicable.

Date Loaded The default for the loaded date is your system date. Edit this field if necessary. If this information is electronically loaded, this field is automatically populated with your system date the day the data is loaded.

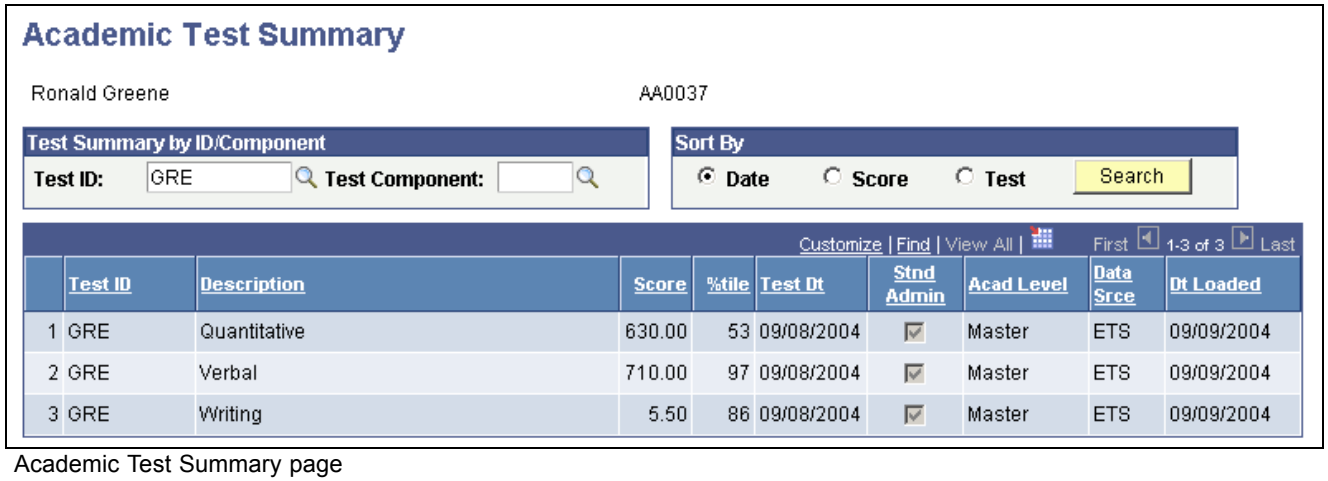
Index The LSAT 3-Year Test Index appears if this information has been loaded.

Stnd Admin (standard administration) The system selects this check box by default, which indicates that this test was administered in a standard fashion. Clear this check box if the test was administered in a nonstandard or non-timed fashion.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Viewing Academic Test Summary Information for Prospects and Applicants

Access the Academic Test Summary page.



Academic Test Summary page

Test ID and **Test Component** Select the test ID and, if desired, a test component about which you want to view summary information.

Date, Score, or **Test** Select the order in which you want the summary information to appear (for example, by date, score or test).

Search Click to access information that matches your search criteria.

Viewing Event and Meeting Summary Information

Use the Person Event Summary page to look up summary information regarding events and meetings for any prospect or applicant in your database.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," Reviewing Events, Meetings, and Attendees

Viewing Schools by Groups

Use the Organization Groups page to view schools or any type of organization, in groups you designate. You can display the list in the order you choose.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Organization Data," Reviewing Organization Data

Viewing an Account Summary

You can view a summary of a applicant's account history through a PeopleSoft Student Financials inquire page. Use the Customer Accounts page to view a applicant's account history.

See *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*, "Assessing Eligibility for Financial Aid," Pages Used to View Application History.

CHAPTER 11

Tracking External Education Information

This chapter provides an overview of external education information and discusses how to:

- Enter and update external data.
- View summary education data.

Understanding External Education Information

Enter and update academic information from external sources, such as transcripts, in the Education component. You can record general and specific external education data, such as schools attended, academic summaries, subjects, degrees, courses, dates of attendance, and so forth. You can also link the appropriate data from these pages to actual applications.

Note. The education information on this component is linked to a *person* as opposed to an *application,* so that you can consider the information when you evaluate specific applications for the person.

This information can be reported on a transcript, self-reported, or reported from another source and linked to specific applications on the Application Materials page.

Entering and Updating External Data

This section discusses how to:

- Enter general external data.
- Enter and update external academic summary information.
- Enter and update external subject information.
- Enter external subject area details.
- Enter and update ESIS previous education data (CAN).
- Enter and update external degrees.
- Enter and update external courses.
- Enter external course default data.

Pages Used to Enter and Update External Data

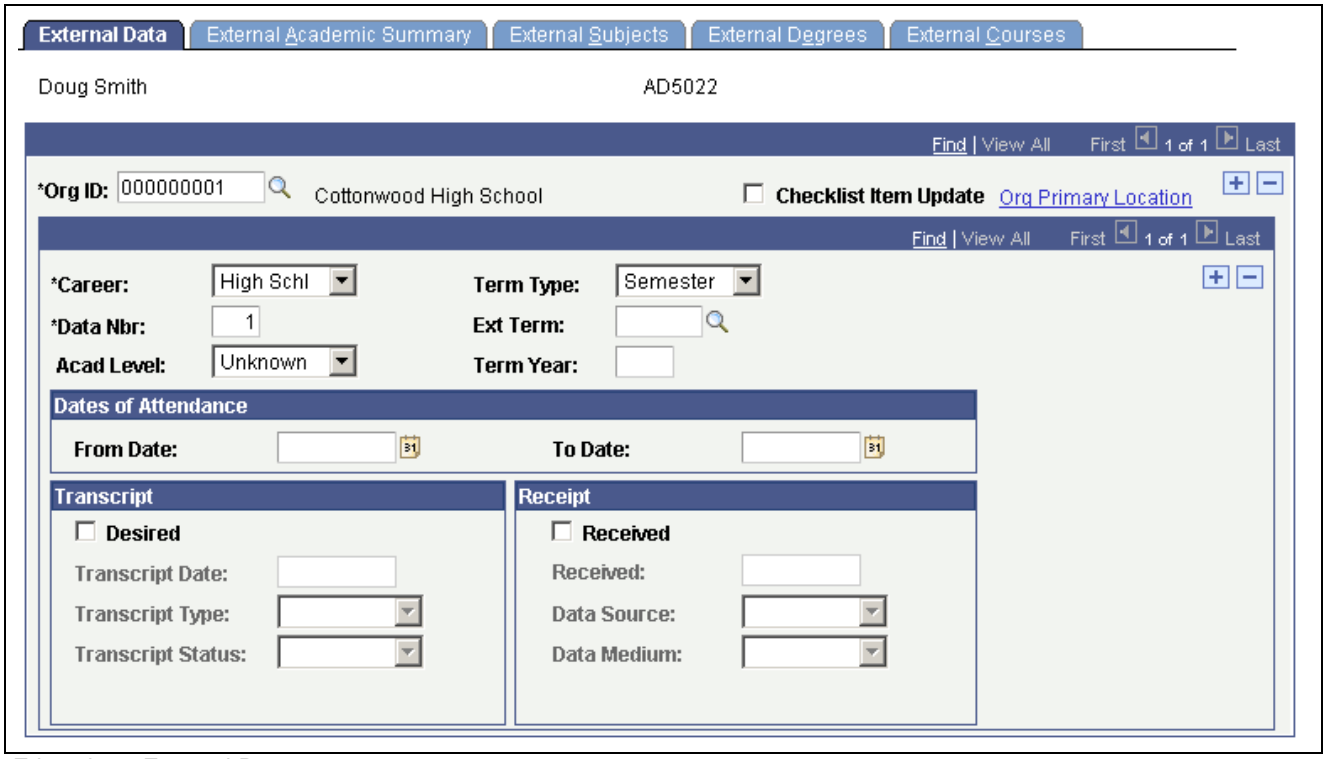
Page Name	Object Name	Navigation	Usage
External Data	EXT_ACAD_DATA	• Student Admissions, Application/Transcript Loads, Education • Student Recruiting, Maintain Prospects, Academic Information, Education • Student Admissions, Application Entry, Academic information, Education or Records and Registration, Transfer Credit Evaluation, External Education	Record information about the schools that a person has attended.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Education - External Data page.	View the primary address of the organization.
Organization School Info (organization school information)	SCHOOL_INFO1	Click the Detail button on the Organization Primary Location page to view additional information about the school.	View additional information about schools that a person has attended. Close the Organization School Information page to return to the External Data page.
External Academic Summary	EXTERNAL_ACAD_SUMM	• Student Admissions, Application/Transcript Loads, Education, External Academic Summary • Student Recruiting, Maintain Prospects, Academic Information, Education, External Academic Summary • Student Admissions, Application Entry, Academic information, Education, External Academic Summary • Records and Registration, Transfer Credit Evaluation, External Education, External Academic Summary	Enter external academic summary information.

Page Name	Object Name	Navigation	Usage
External Subjects	EXTERNAL_ACAD_SUBJ	• Student Admissions, Application/Transcript Loads, Education, External Subjects • Student Recruiting, Maintain Prospects, Academic Information, Education, External Subjects • Student Admissions, Application Entry, Academic information, Education, External Subjects • Records and Registration, Transfer Credit Evaluation, External Education, External Subjects	Enter external subject information.
External Subject Detail	EXT_SUBJ_DETAIL	Click the External Subjects Detail link to open the External Subject Detail page.	Enter details about an external subject area.
Canadian Data	CAN_EXT_ACAD_DATA	Manage Student Records, Process Transfer Credit, Use, Education, Canadian Data	Define previous education information for ESIS (Extended Student Information System) reporting (CAN).
External Degrees	EXTERNAL_DEGREE	• Student Admissions, Application/Transcript Loads, Education, External Degrees • Student Recruiting, Maintain Prospects, Academic Information, Education, External Degrees • Student Admissions, Application Entry, Academic information, Education, External Degrees Records and Registration, Transfer Credit Evaluation, External Education, External Degrees	Enter information about a person's degrees that have been received or that are still in progress. Examples of degree-related information include fields of study, honors, and degree status. The system enables you to link degree data on this page to a specific transcript or other existing information from the External Data page.

Page Name	Object Name	Navigation	Usage
External Courses	EXT_COURSE	• Student Admissions, Application/Transcript Loads, Education, External Courses • Student Recruiting, Maintain Prospects, Academic Information, Education, External Courses • Student Admissions, Application Entry, Academic information, Education, External Courses • Records and Registration, Transfer Credit Evaluation, External Education, External Courses	Enter detailed course information for a person. These might be courses that exist on a transcript, are self-reported, or reported from another source. You can also link courses on this page to a specific transcript or other existing information from the External Data page.
External Course Defaults	EXT_COURSE_DEFAULT	Click the Defaults link on the External Courses page.	Enter default data for external courses.

Entering General External Data

Access the External Data page.



Education - External Data page

Org ID (organization ID) The school to which this external data is related. The system automatically populates this field from the initial add of Last School Attended on the Prospect School/Recruiting page or the Application School/Recruiting page if a value. You can edit this field.

Checklist Item Update Select this check box to indicate that the checklist that relates to this row of external data (or transcript) is updated when you run the Checklist Item Update Automated process. Select this option if you select the Received check box.

Org Primary Location (organization primary location) Click this link to view the primary address of the organization. The Organization Primary Location page appears.

Career Select the external career for the external data that you are entering. Values for this field are delivered with your system as translate values. You can modify these translate values.

Data Nbr (data number) The system populates this field automatically. The first data item (or row) you enter is *1*. The system numbers subsequent rows sequentially (*2, 3,* and so on).

If you change the Data Nbr field on this page, click the Save button prior to prompting on the Data Nbr field in any of the other pages in the Education component.

Acad Level (academic level) Enter the academic level of the person at the time this data was collected or issued. This level might be different from the person's current level. Values for this field are delivered with your system as translate values. You can modify these translate values.

Term Type Select the term type that is used by the external organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Full Year, Miniterm, Other, Quarter, Quinmester, Semester, Trimester,* and *Unknown.*

This field is optional; leave the field blank until you are ready to enter Transfer Credit information.

Ext Term (external term) Select the external term to which this data relates. For example, if this is a Fall transcript, select *FALL* in the Ext Term field. The available values depend on what you entered in the Term Type field. Define external terms on the External Term Table page.

This field is optional; leave it blank until you are ready to enter Transfer Credit information.

Term Year Enter the appropriate term year that is pertinent to this external data entry.

This field is optional; leave it blank until you are ready to enter Transfer Credit information.

From Date and **To Date** Enter the dates that the person attended this school.

Desired Select this check box if you are entering data for a transcript that you requested. The remaining fields in the Transcript group box become available.

Transcript Date Enter the date that the transcript was issued. The transcript date cannot occur after the received date.

Transcript Type Select a transcript type. Values for this field are delivered with your system as translate values. You can modify these translate values. You can also define a

user default for this field on the User Defaults 3 page. The system populates this field with the user default after you select the Desired option.

Transcript Status Select a transcript status. Values for this field are delivered with your system as translate values. You can modify these translate values.

If the Received check box is selected, you can link the data to an application on the Application Materials page.

Received Select this check box if the data that you are entering is for a transcript you have received. The remaining fields in the Receipt group box become available.

Received Enter the date on which your office received the transcript. The received date cannot occur before the transcript date. When you save the page, the system populates this field, but you can override it.

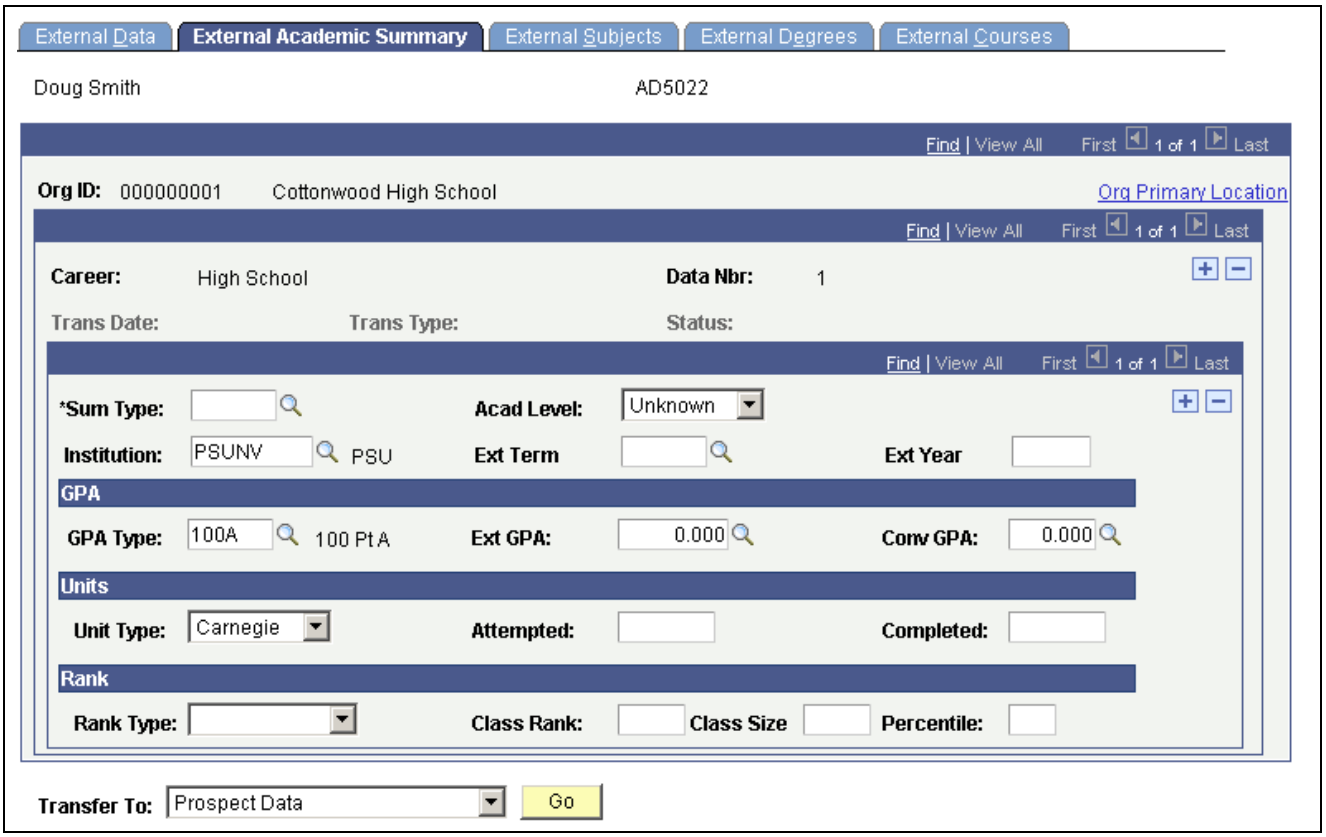
Data Source Enter the data source for this transcript. Values for this field are delivered with your system as translate values. You can modify these translate values. You can also define a user default for this field. The system populates this field with the user default after you select the Received check box.

Data Medium Select the format in which you received the transcript. Values for this field are delivered with your system as translate values. You can modify these translate values. You can also define a user default for this field on the User Defaults 3 page. The system populates the field with the user default after you select the Received check box.

Note. If you are entering two careers, the Desired or Received check boxes must be selected before you save the page.

Entering and Updating External Academic Summary Information

Access the External Academic Summary page.



Education - External Academic Summary page

You can enter GPA (grade point average), units, and rank details for this data, which can be reported on a transcript, self-reported, or reported from another source. You can enter multiple transcripts (or similar data) under an academic institution.

The layout of the page enables you to define how you want to represent a person's academic transcripts. You can associate one or more summaries for a single transcript. You can also enter the summary GPA, units, and rank of a person's entire career; or insert rows to create individual summaries that capture data for various segments of a person's academic career. Enter as many summary types as you require. This structure enables you to capture the GPA, rank, and units for each individual year of school, in addition to the overall summary, on one transcript.

Note. The system automatically populates many of the values on this page according to your user defaults and the data that you entered on the External Data page.

Org Primary Location (organization primary location) — Click this link to view the primary address of the organization for this external academic summary. The Organization Primary Location page appears.

Sum Type (summary type) — Select the summary type for this external data. For example, this could be an overall summary of an entire high school transcript, or a summary of the 12th grade only. Define summary types on the External Summary Type Table page.

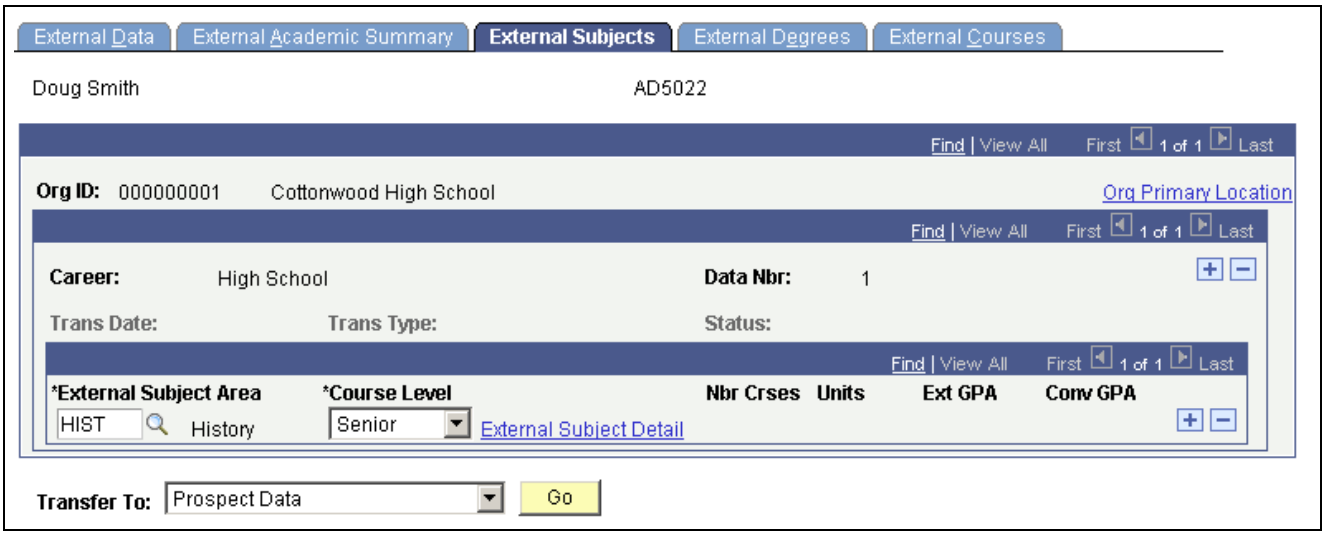
Institution — The code for your academic institution appears.

Acad Level (academic level) — Select the academic level of the person at the time this piece of information was current, which might not be the person's current academic level. For example, this could be a summary of a school year the person has completed.

	Values for this field are delivered with your system as translate values. You can modify these translate values.
Ext Term/Year (external term/year)	Select the external term and year regarding this summary. Define external terms on the External Term Table page.
GPA Type	Select the GPA type that is used by the school from which the information was received. For example, the school can use a 4-point scale or a 100-point scale. Define GPA types on the GPA Type Table page.
Ext GPA (external GPA)	Enter the external GPA from the reported information. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, you can type in the appropriate numeric GPA value.
Conv GPA (converted GPA)	When you navigate to a new page or click the Refresh button, the system automatically converts the GPA if you have defined GPA conversion rules. If you have not defined GPA conversion rules, the GPA that you enter in the External GPA field is copied into the Conv GPA field. The system converts the GPA when you click the Refresh button or when you navigate out of this page.
Unit Type	Select the unit type that is used by the school on this transcript or reported information. Values for this field are delivered with your system as translate values. You can modify these translate values.
Attempted	Enter the number of units that were attempted by the person for this summary.
Completed	Enter the number of units that were completed at the time this summary transcript or reported information was recorded.
Rank Type	Select the rank type. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Unweighted* and *Weighted.*
Class Rank/Class Size	Enter the person's rank in their class and the size of the class.
Percentile	When you navigate to a new page or click the Refresh button, the system automatically calculates the percentile.

Entering and Updating External Subject Information

Access the External Subjects page.



Education - External Subjects page

External subject information can be reported on a transcript, self-reported, or reported from another source. Storing this data is useful for grouping subjects. For example, if your office tracks subject area requirements but does not want to enter or load all of the external courses a student has taken, you can record course level, number of courses, units, external GPA, and converted GPA details about external subject areas.

Org Primary Location (organization primary location) — Click this link to view the primary address of the organization where these external subject areas were taken. The External Subject Detail page appears.

External Subject Area — Select an external subject area. Define external subjects on the External Subject Table page.

Course Level — Select the course level taken in this area. Values for this field are delivered with your system as translate values. You can modify these translate values.

External Subject Detail — Click this link to enter details about an external subject area. The External Subject Detail page appears.

Nbr Crses (number of courses attempted) — The system populates this field from the External Subject Detail page.

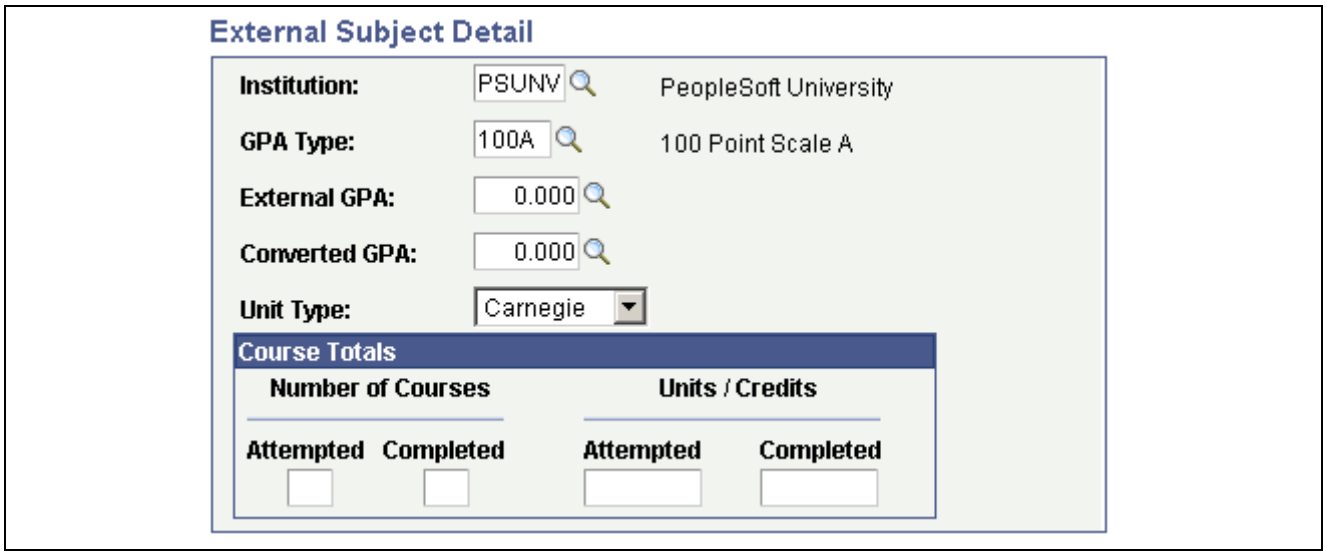
Units — The system populates this field from the External Subject Detail page.

Ext GPA (external grade point average) — The system populates this field from the External Subject Detail page.

Conv GPA — The system populates this field from the External Subject Detail page.

Entering External Subject Area Details

Access the External Subject Detail page.



External Subject Detail page

Institution The code for your academic institution appears.

GPA Type Select the GPA type for the school that the person attended. Define GPA types on the GPA Type Table page.

External GPA Enter the external GPA that was earned by the applicant for this subject. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, type in the appropriate GPA value.

Converted GPA The system automatically converts the GPA if you have defined GPA conversion rules. If you have not defined GPA conversion rules, the system copies the GPA that you enter in the External GPA field into the Converted GPA field.

Unit Type Select a unit type. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Adult, Carnegie, CEU, No Credit, Other, Quarter, Semester, Units, Unknown,* or *Vocational.*

Number of Courses, Attempted, and **Completed** Enter the number of courses that the person attempted and completed.

Units/Credits, Attempted, and **Completed** Enter the number of units or credits that the person attempted and completed.

(CAN) Entering and Updating ESIS Data

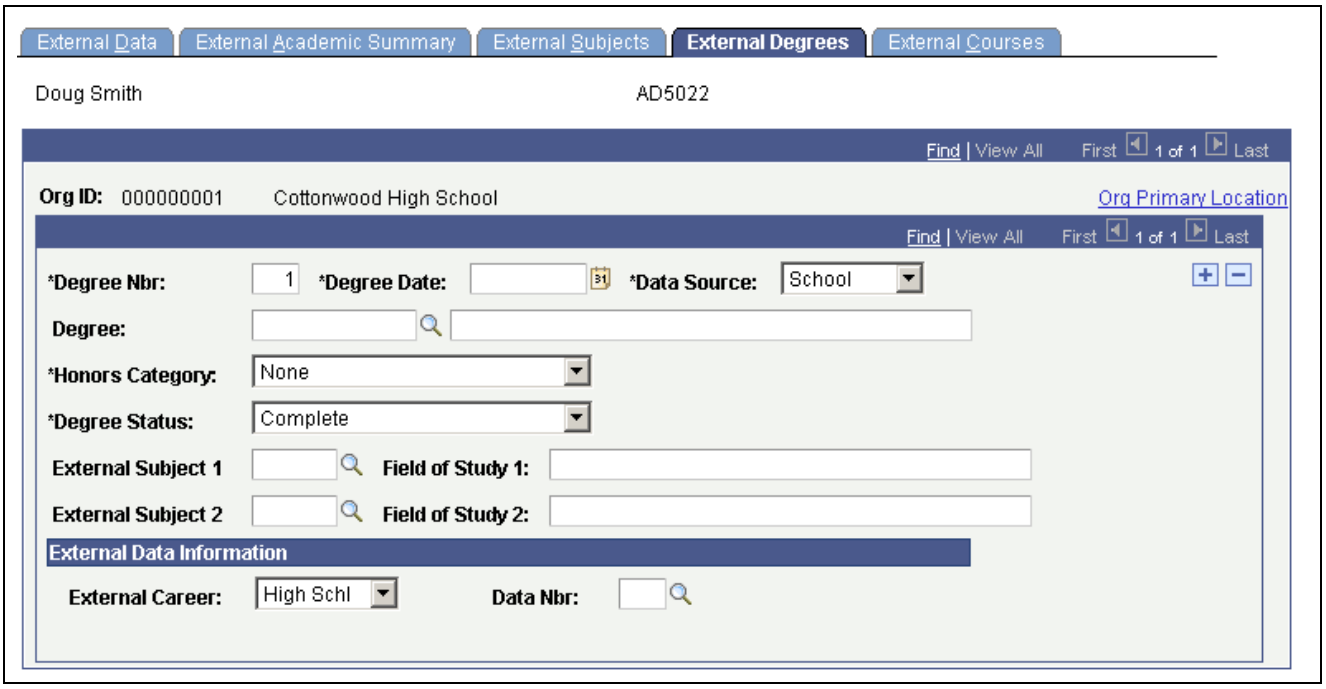
Access the Canadian Data page.

Previous Educational Activity Enter the most recent educational activity of the student.

Previous PostSecond Credential (previous postsecondary credential) Enter the type of credential that is associated with successful completion of the student's most recent postsecondary education.

Entering and Updating External Degrees

Access the External Degrees page.



Education - External Degrees page

Org Primary Location (organization primary location) Click this link to view the primary address of the school to which this degree is related. The Organization Primary Location page appears.

Degree Nbr (degree number) The system populates this field automatically. The first data item (or row) you enter is *1*. The system numbers subsequent rows sequentially (*2, 3,* and so on).

Degree Date Enter the date this degree was or will be granted.

Data Source Enter the data source for this degree information. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree Select the external degree that the person received or that is still in progress. The system populates the description automatically. Define degrees on the Degree Table page.

To enter a degree that is not defined in the Degree Table page, leave the Degree field blank and type in the appropriate information in the description field to the right of the Degree field.

Honors Category Select an honors category if the person received an honor for this degree. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree Status Select the degree status. Values for this field are delivered with your system as translate values. You can modify these translate values.

External Subject 1 and **Field of Study 1** Select an external subject or field of study if the person had a subject or field of study concentration for this degree. Define external subjects on the External

Subject Table page. However, if you must enter an external subject area that is not defined in your system, leave the field blank and click the tab to access the related description field and enter descriptive text.

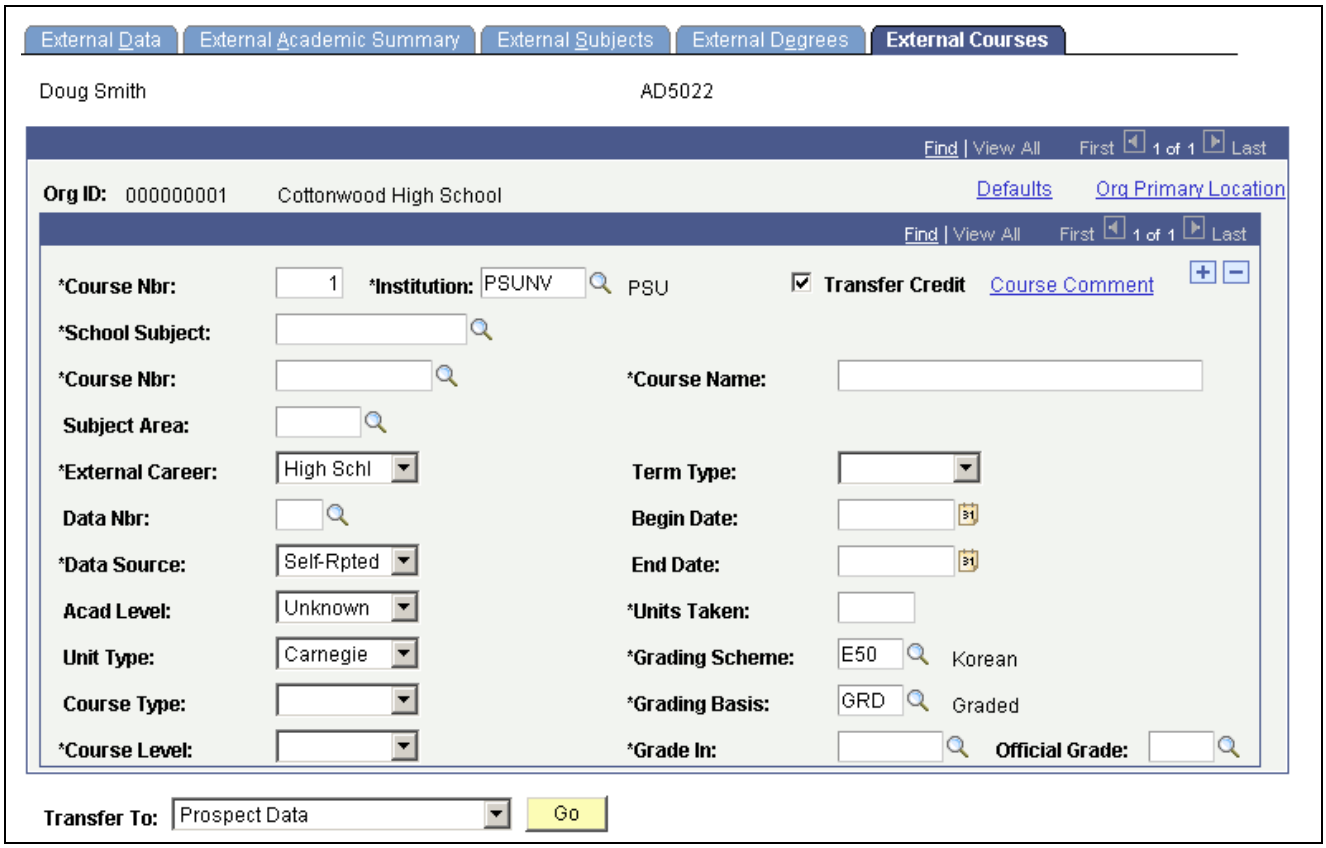
This description also applies to the External Subject 2 and Field of Study 2 fields.

External Career Select the person's external career for this degree. Values for this field are delivered with your system as translate values. You can modify these translate values.

Data Nbr (data number) If this degree information is related to a specific transcript or source of information, enter the data number of the transcript or other source. The system populates this field from the External Data page. You cannot link to a *newly entered* data number until the External Data page has been saved.

Entering and Updating External Courses

Access the External Courses page.



Education - External Courses page

Important! If you have more than one course to enter, click the Defaults link to enter information that is common to each course. This will save you data entry time.

Defaults To enter a group of courses with different default information for this same school and person, save the page and then click the Defaults button to return to the External Course Defaults page and enter new default information.

Org Primary Location (organization primary location) Click this link to view the primary address of the school to which this degree is related. The Organization Primary Location page appears.

Course Nbr (course number) The system populates this field automatically. The first data item (or row) you enter is *1*. The system numbers subsequent rows sequentially (*2, 3,* and so on).

Institution The system displays the code for your academic institution.

Transfer Credit Select this check box to consider the external course information to be transfer credit. The system includes this course in its transfer credit process.

School Subject Select the subject of the course that you are entering. If you have set up a course catalog for this school, you can prompt for valid values on this field. If a course catalog does not exist for this school, enter the subject.

Course Nbr (course number) Select the school course number of this course. If you have set up a course catalog for this school, you can prompt for valid values on this field. If a course catalog does not exist for this school, type in the course number. The system displays the description of the course if the course is linked to a course catalog. If the course is not linked to a course catalog, enter the description of this course.

Subject Area Select the external subject area to which this course belongs. Subject areas help you identify common subjects with different titles. For example, similar subjects that offered at external schools could have diverse titles such as "Creative Writing," "Writing Fiction," and "Freestyle Writing." You can link a common external subject area such as "writing," to all of these subjects. Define external subject areas on the External Subject Table page.

External Career The system automatically populates the external career from the School Data page for this organization. Edit the field if necessary.

Data Nbr (data number) If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you tab out of this field, the system automatically populates remaining fields from the data that is linked to this data number. If the courses you are entering are *not* linked to a data number, skip this field and complete the remaining fields.

Note. The *newly entered* data number values are not available until they have been saved on the External Data page.

Data Source Select the data source for this course information. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level) Select the person's academic level at the time these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type Select the unit type for these courses. Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Type Select the course type that defines this course. Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Level Select the course level of this course. Values for this field are delivered with your system as translate values. You can modify these translate values.

Transfer Credit Type This field appears only if your system installation country equals *CAN*. Indicate the type of transfer credit for the student. Your choices are *Dom Exch, Foreign Ex, More than 1, No Permiss, Other, PLA/Skill, Unknown,* and *W/Permiss*.

Term Type Select the term type that is used by the school where these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values. Depending on the term type you enter, you must enter a begin date and end date or an external term and term year.

External Term Select the external term in which these courses were taken. This field becomes available if you enter a Term Type of Full Year, Miniterm, Quarter, Quinmester, Semester or Unknown. Define external terms on the External Term Table page.

Term Year Enter the term year during which these courses were taken. This field becomes available if you enter a Term Type of Full Year, Miniterm, Quarter, Quinmester, Semester or Unknown.

Begin Dateand End Date These fields become available if the term type of*Other* is entered. Enter the date the course began or enter the date the course ended.

Units Taken Enter the number of units taken for this course.

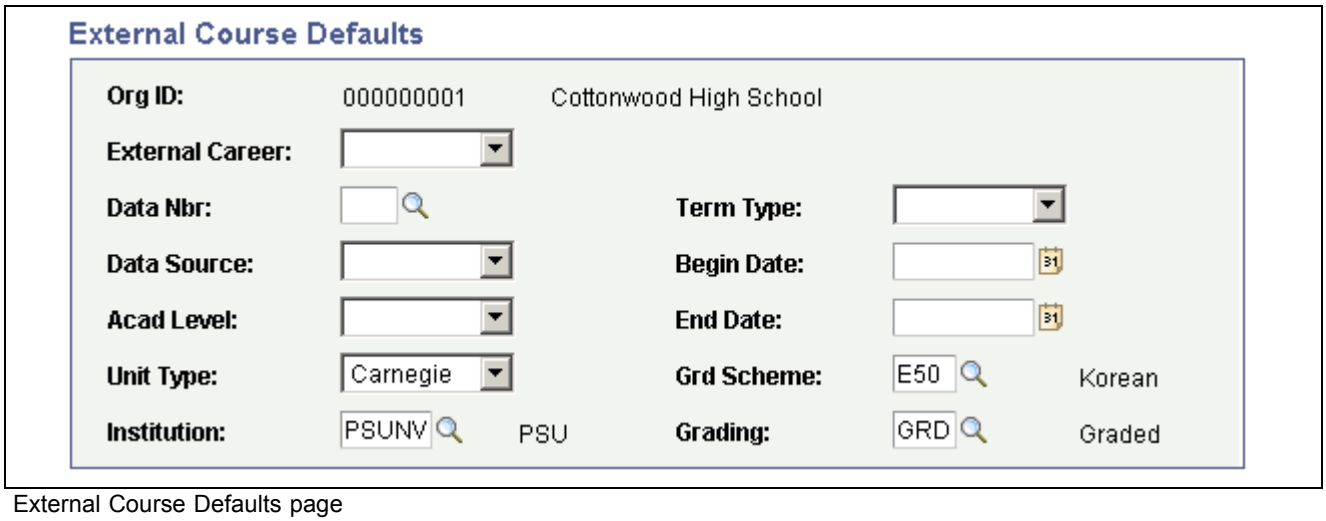
Grading Scheme Select the grading scheme to convert the external school's grading scheme to your standards. Define grading schemes on the Grading Scheme Table page.

Grading Basis Select a grading basis for the grading scheme. The available values depend on what grading scheme you enter.

Grade In/Official Grade Select the grade that the applicant earned in this course. The available values are determined by the grading scheme. When you click the Refresh button or navigate out of this page, the system converts the grade according to your grading scheme definition and displays in the field to the right of the Grd In/Official field.

Entering External Course Default Data

Access the External Course Defaults page.



External Course Defaults page

External Career The system automatically populates this field from the School Data page for this organization. Edit this field if necessary.

Data Nbr (data number) If this course information is linked to a row of data, such as a transcript on the External Data page, enter the data number from that page. When you navigate out of this field, the system automatically populates the remaining fields from the data that is linked to this data number. If the courses you are entering are *not* linked to a data number, skip this field and complete the remaining fields.

Note. The *newly entered* data number values are not available until they have been saved on the External Data page.

Data Source Select the data source for this course information. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level) Select the person's academic level at the time these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type Select the unit type for these courses. Values for this field are delivered with your system as translate values. You can modify these translate values.

Institution The system displays the code for your academic institution.

Term Type Select the term type that is used by the school where these courses were taken. Values for this field are delivered with your system as translate values. You can modify these translate values. Depending on the term type you entered, you must enter a begin date and end date or an external term and term year.

Begin Dateand End Date These fields become available if the term type of*Other* is entered. Enter the date the course began or enter the date the course ended.

External Term Select the external term in which these courses were taken. This field becomes available if you enter a Term Type of Full Year, Miniterm, Quarter, Quinmester, Semester or Unknown. Define external terms on the External Term Table page.

Term Year Enter the term year during which these courses were taken. This field becomes available if you enter a Term Type of Full Year, Miniterm, Quarter, Quinmester, Semester or Unknown.

Grd Scheme (grading scheme) Select the grading scheme to convert the external school's grading scheme to your standards. Define grading schemes on the Grading Scheme Table page.

Grading Select a grade base for the grading scheme. The available values depend on what grading scheme you have entered.

Note. The values that you enter on the External Course Defaults page appear automatically on the External Courses page.

Viewing Summary Education Data for Prospects and Applicants

Use the Education Summary component to look up summaries of external education information stored for prospects and applicants.

This section discusses how to:

- View external academic summary information.
- View external subject summary information.
- View external degree summary information.
- View external course summary information.

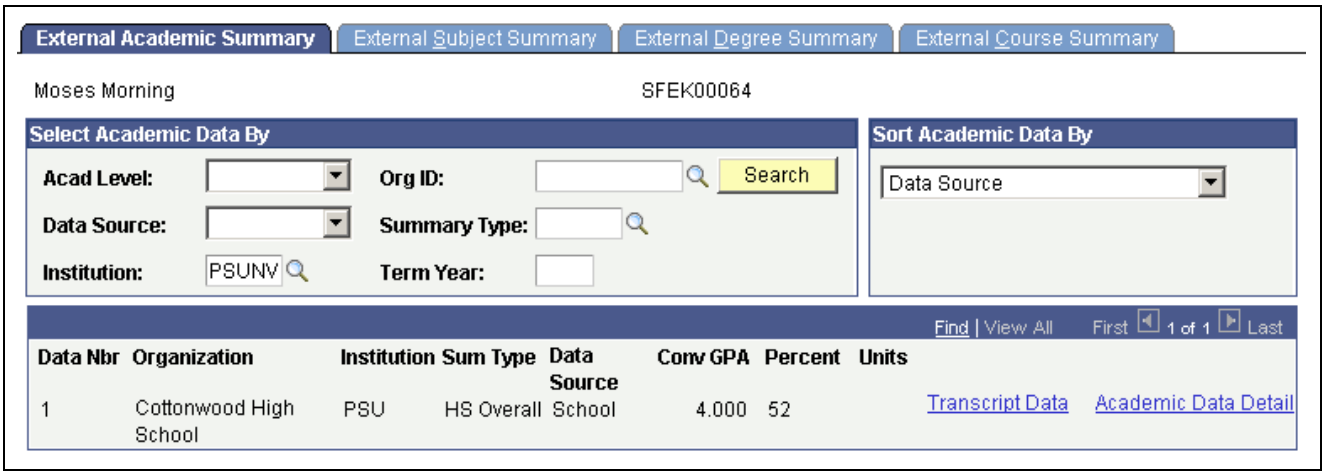
Pages Used to View Summary Education Data for Prospects and Applicants

Page Name	Object Name	Navigation	Usage
External Academic Summary	EXT_ACAD_SUMMARY	• Student Admissions, Applicant Summaries, Education Summary • Student Recruiting, Prospect Summaries, Education Summary	View a person's external academic summary information displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC1	Click the Transcript Data link on the External Academic Summary page.	View details about an external academic entry.
Academic Data Detail	EXT_ACAD_SEC	Click the Academic Data Detail link on the External Academic Summary page.	View further details about a transcript.
External Subject Summary	EXT_SUBJ_SUMMARY	• Student Admissions, Applicant Summaries, Education Summary, External Subject Summary • Student Recruiting, Prospect Summaries, Education Summary, External Subject Summary	View summaries of a person's external subject matter displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC2	Click the Transcript Data link on the External Subject Summary page.	View further details about an external academic entry.
Academic Subject Detail	EXT_SUBJ_SUM_SEC	Click the Academic Subject Detail link on the External Subject Summary page.	View further details about an external subject summary.
External Degree Summary	EXT_DEGREE_SUMMARY	• Student Admissions, Applicant Summaries, Education Summary, External Degree Summary • Student Recruiting, Prospect Summaries, Education Summary, External Degree Summary	View a person's external degree summary information that is displayed in the order you designate. You can access this page for prospects and for applicants.

Page Name	Object Name	Navigation	Usage
Transcript Data	TRANSCRIPT_SEC3	Click the Transcript Data link on the External Degree Summary page.	View further details about an external academic entry.
External Course Summary	EXT_COURSE_SUMMARY	• Student Admissions, Applicant Summaries, Education Summary, External Course Summary • Student Recruiting, Prospect Summaries, Education Summary, External Course Summary	View a person's external course summary information that is displayed in the order you designate. You can access this page for prospects and for applicants.
Transcript Data	TRANSCRIPT_SEC4	Click the Transcript Data link on the External Course Summary page.	View further details about an external academic entry.
External Course Detail	EXT_COURSE_DTL	Click the External Course Detail link to view on the External Course Summary page.	View further details about External Course summary information.

Viewing External Academic Summary Information

Access the External Academic Summary page.



External Academic Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select criteria such as academic level, data source, academic institution, organization ID, summary type and term year to search for external academic summary information.

Sort Academic Data By Select which sort order you prefer. A person can have multiple rows of data (such as official 10th grade, official 11th grade, and so on). Sort order defines the order in which the system displays the data.

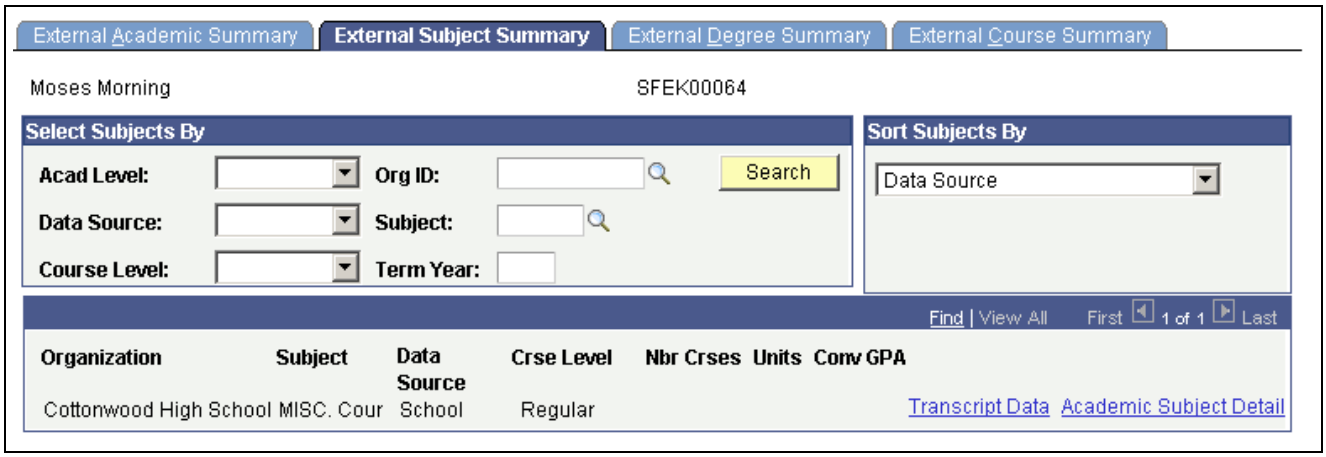
Search Click this button to view information matching your search and sort criteria.

Transcript Data If an external academic entry is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Academic Data Detail Click this link to view additional details about a transcript. The Academic Data Detail page appears.

Viewing External Subject Summary Information

Access the External Subject Summary page.



External Subject Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select criteria such as academic level, data source, course level, organization ID, subject, and term year to search for external subject summary information

Sort Subjects By Select which sort order you prefer. A person can have multiple rows of data (such as math, English, and so on). Sort order defines the order in which the system displays the data.

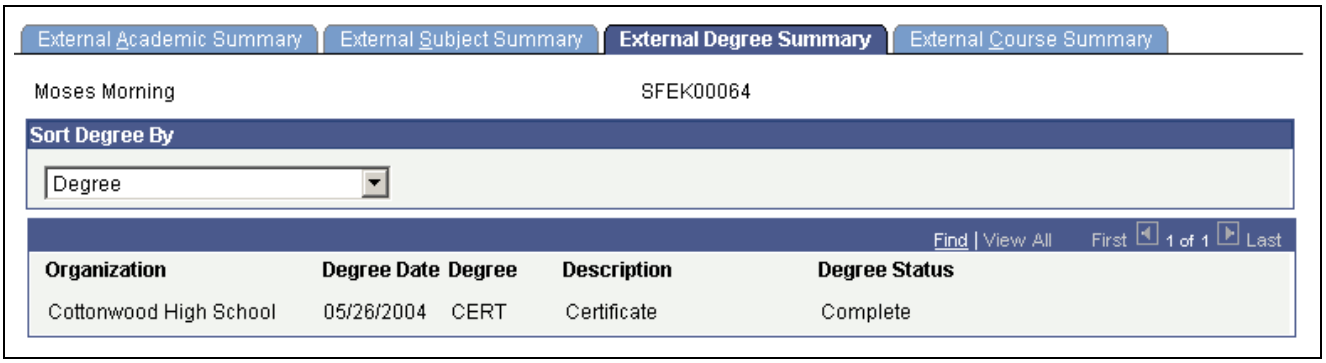
Search Click this button to bring up information matching your search and sort criteria.

Transcript Data If an external subject summary is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Academic Subject Detail Click this link to view further details about an external subject summary. The Academic Subject Detail page appears.

Viewing External Degree Summary Information

Access the External Degree Summary page.



External Degree Summary page

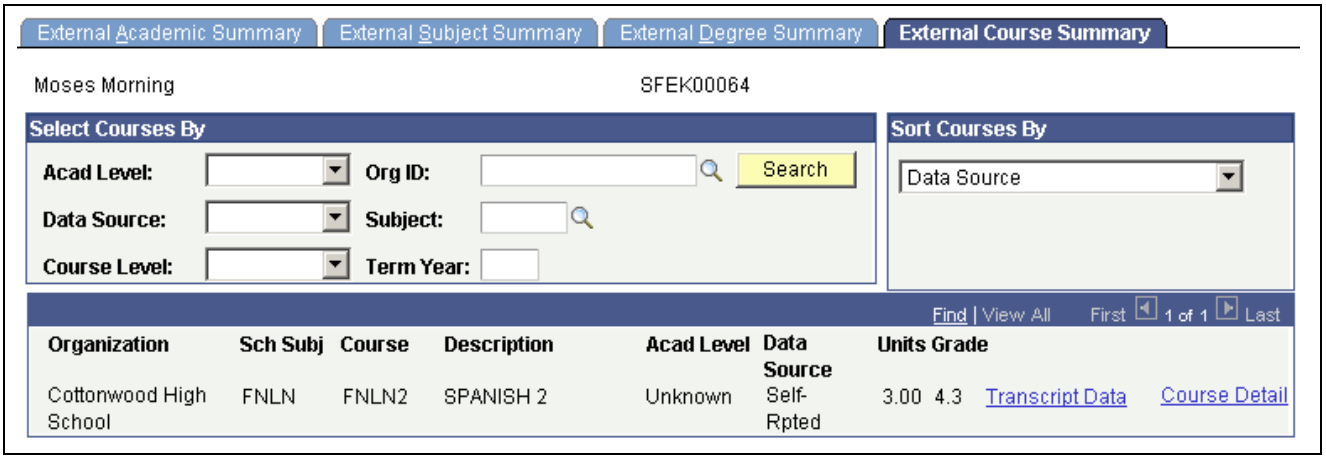
To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Sort Degree By Indicate the order in which you want to view degree information. For example, you can view the data by *Degree, Trans Date* (transcript date), or *(none)*.

Transcript Data If an external degree summary is from a transcript, click this link to view details about the transcript. The Transcript Data page appears.

Viewing External Course Summary Information

Access the External Course Summary page.



External Course Summary page

To retrieve information about a person on this page, you must first enter academic summary information for the person in the Education component.

Select criteria such as academic level, data source, course level, organization ID, subject, and term year to search for external course summary information.

Sort Course By Select which sort order you prefer. A person can have multiple rows of data (such as ENGL101, MATH125, and so on). Sort order defines the order in which the system displays the data.

Search Click this button to bring up information matching your search and sort criteria.

Transcript Data If this course information is from a transcript, click this button to view details about the transcript.

External Course Detail Click this link to view further details about external course summary information. The External Course Detail page opens.

CHAPTER 12

Tracking General and Application Materials for Prospects and Applicants

This chapter discusses how to:

- Enter general materials for prospects and applicants.
- Manually link materials to an application.
- View summary application materials information.

Entering General Materials for Prospects and Applicants

This section discusses how to:

- Enter general materials.
- Add details about the recommender.
- View general materials summary information for prospects and applicants.
- Manually associate supporting materials to an application.
- Link general materials to applications.

Pages Used to Enter General Materials for Prospects and Applicants

Page Name	Object Name	Navigation	Usage
General Materials	GENL_MATERIALS	• Student Admissions, Application Evaluation, Evaluate Application Materials, General Materials • Student Recruiting, Evaluate Prospects, General Materials	Enter supporting information for prospects and applications. The type of information you record here is the information that you defined as a general material type. For example, PeopleSoft considers essays, portfolios, recommendations and interviews as general materials. General material data is linked to a *person,* so anything that you enter on this page can be used to evaluate any applications for this person. After you have identified the general materials, you can link them to applications and evaluations.
Recommender Information	ORG_DATA_PANEL	Click the Recommender Information link on the General Materials page.	Add details about the recommender.
Address Information	ADDR_INFO_PANEL	Click the Address Information link on the General Materials page.	View, add, or edit a recommender's mailing address. If you select an address location on the Recommender Information page, the system automatically populates the address on this page. Conversely, you can manually enter the mailing address information you have for this recommender. Note that if this is an address of an organization, any changes you enter do not affect the addresses that are stored elsewhere in the system for the school or organization with which this recommender is affiliated.

Page Name	Object Name	Navigation	Usage
General Materials Summary	GENL_MATL_SUMMARY	• Student Admissions, Applicant Summaries, General Materials Summary • Student Recruiting, Evaluate Prospects, General Materials Summary	View any general materials stored for a person. You can display the information by material group or material type.
Recommender	RECOMMENDER_SEC1	Click the Recommender link on the General Materials Summary page.	View further details about general materials summary information. This Recommender Detail page is available with a *Recommendation* material type entry.

Linking Materials to an Application

This section discusses how to link materials to an application.

Pages Used to Link Materials to an Applications

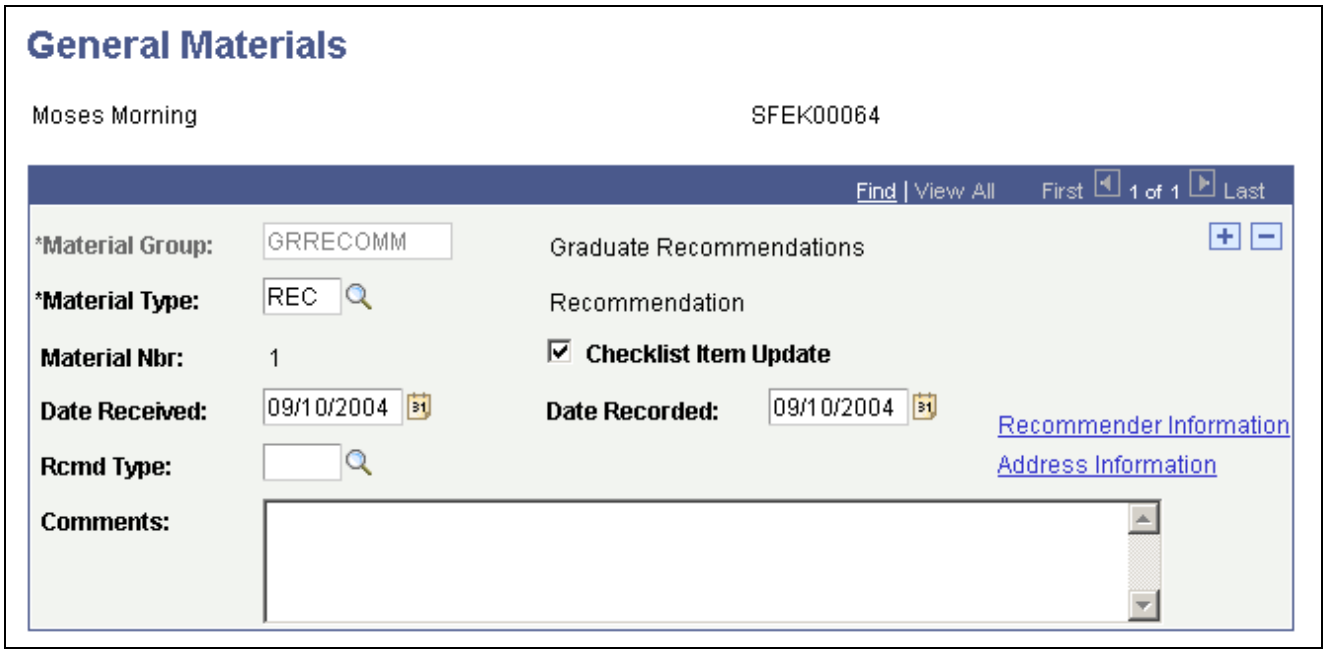
Page Name	Object Name	Navigation	Usage
Application Materials	ADM_APPL_MATL	Student Admissions, Application Entry, Application Materials, Application Materials	Manually associate application materials to an application. If the information for this person is stored elsewhere in the database, you can link the pertinent data to an application on this page.
Select Test Scores	APPL_SCORES_SP	After choosing a test score material group, click the Test Scores link on the Application Materials page.	View test scores that are associated with this applicant. Select the test IDs that you want to link to this application. All tests for this applicant that are not already linked to this application are available on this page. Select only those tests that are relevant to this material group and application. You can enter tests for a applicant on the Test Results page.

Page Name	Object Name	Navigation	Usage
Select Academic Summary Data	APPL_ACAD_SUMM_SP	After choosing an academic summary material group, click the Academic Summary link on the Application Materials page.	Link an academic summary group to this application. the system stores all academic summaries for this applicant that are not already linked to this application are available on this page. Select only those academic summaries that are relevant to this material group and application. You can enter academic summaries for an applicant on the External Academic Summary page.
Select External Courses	APPL_COURSE_SP	After you choose an external course material group, click the External Courses link on the Application Materials page.	Link external courses to this application. Select the external courses that you want to link to this application. All external courses for this applicant that are not already linked to this application are available on this page. Select only those external courses that are relevant to this material group and application. You can enter external courses for an applicant on the External Courses page.
Select External Subject	APPL_SUBJECTS_SP	After you choose an external subjects material group, click the External Subjects link on the Application Materials page.	Link external subjects to this application. Select the external subjects that you want to link to this application. All external subjects for this applicant that are not already linked to this application are available on this page. Select only those external subjects that are relevant to this material group and application. You can enter external subjects for an applicant on the External Subjects page.

Page Name	Object Name	Navigation	Usage
Select Transcripts	APPL_TRANSCRIPT_SP	After you choose a transcripts material group, click the Transcripts link on the Application Materials page.	Link transcripts to this application. Select the transcripts that you want to link to this application. All transcripts for this applicant that are not already linked to this application are available on this page. Select only those transcripts that are relevant to this material group and application. You can enter transcript information for an applicant on the External Data page.
Select General Materials	APPL_MATL_SP	Click the General Materials link on the Application Materials page.	Link general materials to this application. Select only those general materials that you want to link to this application. All general materials for this applicant that are not already linked to this application are available on this page. You can enter general materials for an applicant on the General Materials page.
Recommender Detail	INTERVIEWER_SEC2	Click the Recommender Detail link on the Select General Materials page.	View information about an interviewer or a recommender.

Entering General Materials

Access the General Materials page.



General Materials page

Note. The fields on this page vary depending on the material group type you select. The material data that is attached to this type dictates what fields are available. For example, the Recommender Information and Address Information links enable you to enter information and addresses about recommenders. However, these links appear on the page only when the material type is *REC* (recommendation).

Material Group — Select the material group to which you are associating this applicant. Only material groups that include a material type that is marked General Material are available to select. Define material groups on the Material Group Table page.

Material Type — Select a material type. Only general material types from this material group are available. Material types are associated with groups on the Material Group Table page.

Material Nbr (material number) — This display-only field shows which general material entry you are viewing for this person. For example, the first general material entry is number *1,* the second is number *2,* and so on.

Checklist Item Update — When you add a new material group row, the system automatically populates this check box. The check box indicates that the checklist related to this row of general material data is updated when you run the Checklist Item Update Automated process.

Date Received — The system uses the system date as the default date on which materials were received. Edit this field if necessary.

Date Recorded — The system uses the system date as the default date on which materials were recorded. Edit this field if necessary.

Rcmd Type (recommender type) — The remaining fields you see depend on the variable data that is associated with the material type that you select. In the example, you fill in the recommender type. Values for this field are delivered with your system as translate values. You can modify these translate values.

Comments — Enter any notes or text for this general materials entry.

Recommender Information This link appears when you select the Recommender material type. Click this link to add details about the recommender. The Recommender Information page appears.

Address Information This link appears when you select the Recommender material type. Click this link to view, add, or edit the mailing address for this recommender. The Address Information page appears.

Adding Details About the Recommender

Access the Recommender Information page.

ID If this recommender is in your database, select the person's ID.

Name If you select an ID, the recommender's name automatically appears. If you did not select an ID because this recommender is not in your database, type in the recommender's name.

Title Enter the recommender's title.

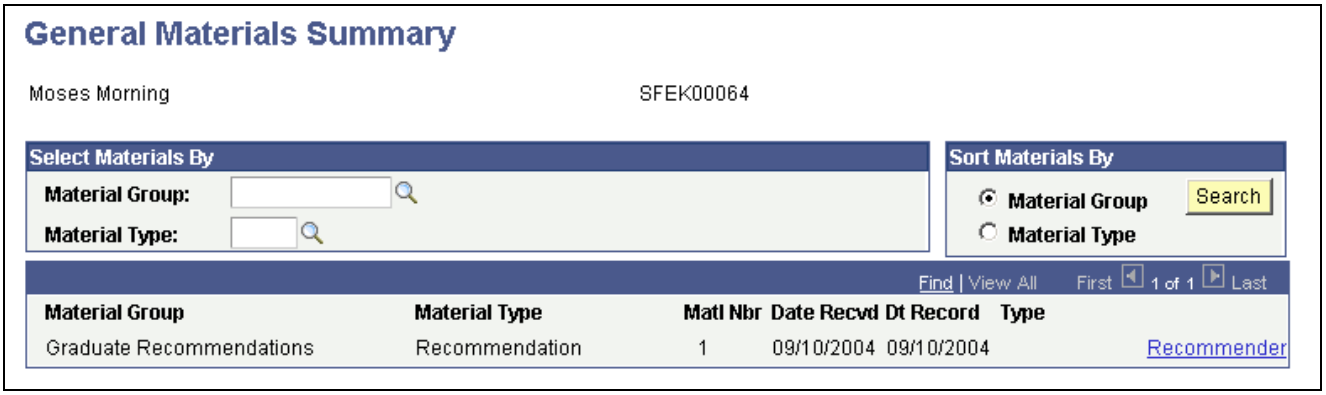
Org ID (organization identification) If the recommender is affiliated with a school or organization in your database, select the organization ID. The name of the organization automatically appears. Leave this field blank if the recommender is not associated with a school or organization in your database and type in the name of the organization.

Location If you entered an organization ID, you can choose any defined address for the organization or school you want to use as a mailing address for the recommender.

Org Name (organization name) The system automatically populates the organization name if you enter an organization ID. Type in the organization name if the organization does not already exist in your database.

Viewing General Materials Summary Information for Prospects and Applicants

Access the General Materials Summary page.



General Materials Summary page

You must first enter general material information for this person in the General Materials page.

Select Materials By

Material Group Select a material group to search for a summary of general materials for this person based on material group.

Material Type Select a material type to search for a summary of general materials for this person based on material type.

Sort Materials By

Material Group Select a material group to sort the findings by material group.

Material Type Select a material type to sort the findings by material type.

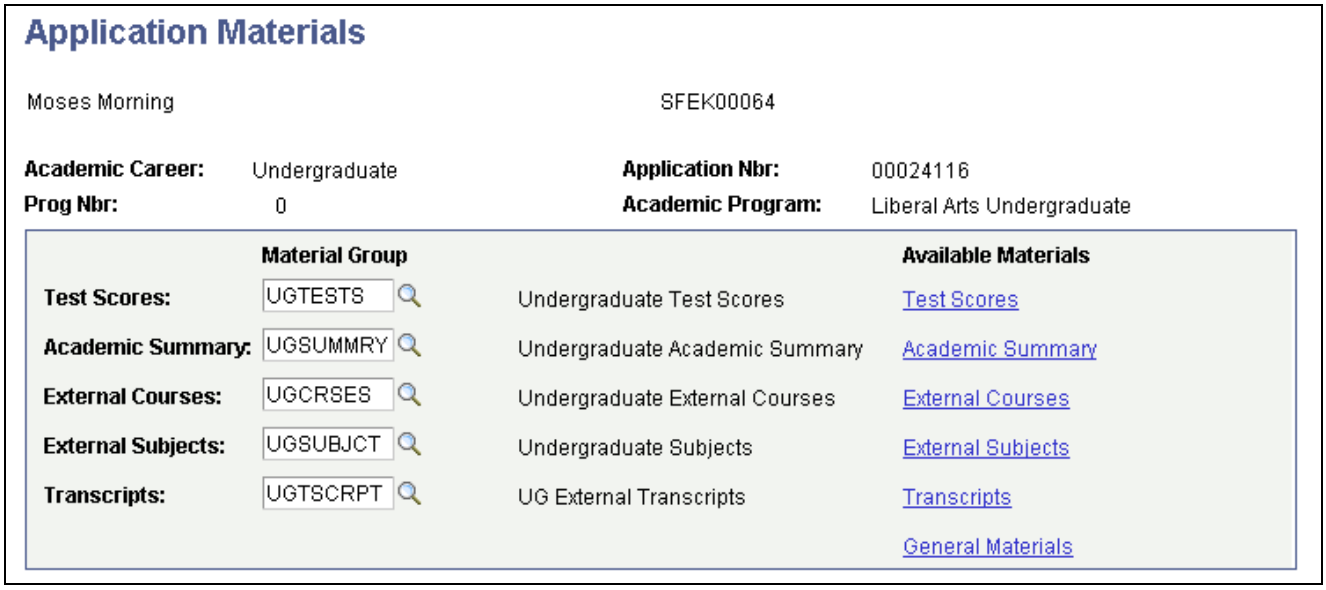
Search Click the Search button to locate information that matches your search criteria.

Other Page Elements

Recommender Click to view additional details about general materials summary information for a particular row.

Manually Associating Supporting Materials to an Application

Access the Application Materials page.



Application Materials page

An application for this person must already exist.

Test Scores To link a test score group to this application, select a material group for the test scores material type. Only groups that include a test scores material type are available. Define material groups on the Material Group Table page.

After you select a test score material group, click the Test Scores link to view a list of test scores that are associated with this applicant. The Select Test Scores page appears.

Academic Summary To link an academic summary group to this application, select a material group for the academic summary material type. Only those groups that include an academic summary material type are available.

After you select an academic summary material group, click the Academic Summary link to view a list of academic summaries that are associated with this applicant. The Select Academic Summary Data page appears.

External Courses To link an external course group to this application, select a material group for the external courses material type. Only those groups that include an external courses material type are available.

After you select an external course material group, click the External Courses link to view a list of external courses that are associated with this applicant. The Select External Courses page appears.

External Subjects To link an external subject group to this application, select a material group for the external subjects material type. Only those groups that include an external subjects material type are available.

After you select an external subjects material group, click the External Subjects link to view a list of external courses that are associated with this applicant. The Select External Subjects page appears.

Transcripts To link transcripts to this application, select a material group for the transcripts material type. Only those groups that include a transcripts material type are available.

After you select a transcripts material group, click the Transcripts link to view a list of transcripts that are associated with this applicant. The Select Transcripts page appears.

General Materials Click to link general materials to this application. The Select General Materials page appears, where you can view a list of general materials that are associated with this applicant.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

See Also

Chapter 21, “Evaluating Applicants Using Automatic Processing,” Assigning Evaluation Codes to Applications in Batch, page 402

Linking General Materials to Applications

Access the Select General Materials page.

Recommender Detail If an interviewer or recommended is linked to a general material entry, click the Recommender Detail link to view information about that person.

Viewing Summary Application Materials Information

This section discusses how to:

- View materials summary information.
- View academic summary information.
- View academic subjects summary information.
- View course summary information.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 117

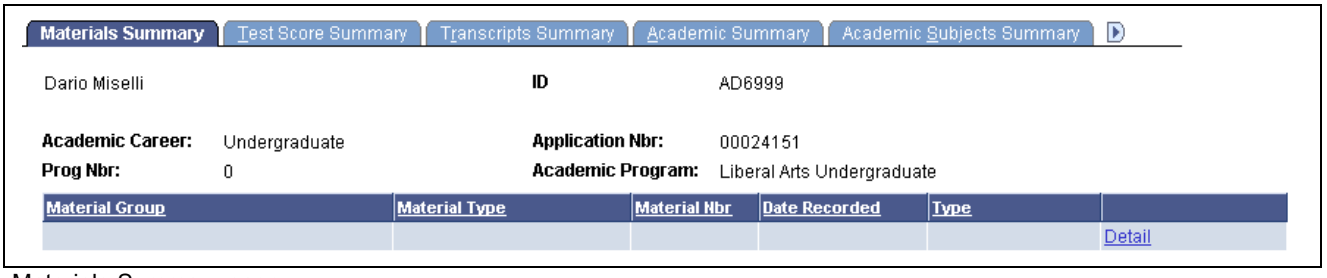
Pages Used to View Summary Application Materials Information

Page Name	Object Name	Navigation	Usage
Materials Summary	APPL_MATL_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Materials Summary	View summary information regarding materials assigned to a person, and associated with a particular application and academic program.
Interviewer Detail	INTERVIEWER_SEC	Click the Interviewer Detail link on the Materials Summary page.	View additional interview information.
Recommender Detail	RECOMMENDER_SEC	Click the Recommender Detail button on the Materials Summary page.	View additional recommender information.
Test Score Summary	APPL_TEST_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Test Score Summary	View summary test scores information that is associated with a particular application and academic program.
Transcripts Summary	APPL_TRNS_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Transcripts Summary	View summary transcript information that is associated with a particular application and academic program.
Academic Summary	APPL_SUMM_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Academic Summary	View academic summary information that is associated with a particular application and academic program. You can view the data in a variety of formats, depending on your selection criteria.

Page Name	Object Name	Navigation	Usage
Application Summary Detail	APPL_SUMM_SEC	Click the App Summary Detail link on the Academic Summary page to view the Application Summary Detail page.	View application detail information.
Academic Subjects Summary	APPL_SUBJ_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Academic Subjects Summary	View summary information about academic subjects that are associated with a particular application and academic program.
Academic Subject Detail	APPL_SUBJ_SUM_SEC	Click the Acad Subject Detail button on the Academic Subjects Summary page to view the Application Subject Detail page.	View application subject information.
Course Summary	APPL_CRSE_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Course Summary	View summary course information that is associated with a particular application and academic program.
Transcript Data	APPL_CRSE_TRAN_SEC	Click the Transcript Data link to open the Transcript Data page.	View transcript data.
Application Course Detail	APPL_CRSE_SEC	Click the App Course Detail link to open the Application Course Detail page.	View an applicant's course detail information.

Viewing Materials Summary Information

Access the Materials Summary page.



Materials Summary page

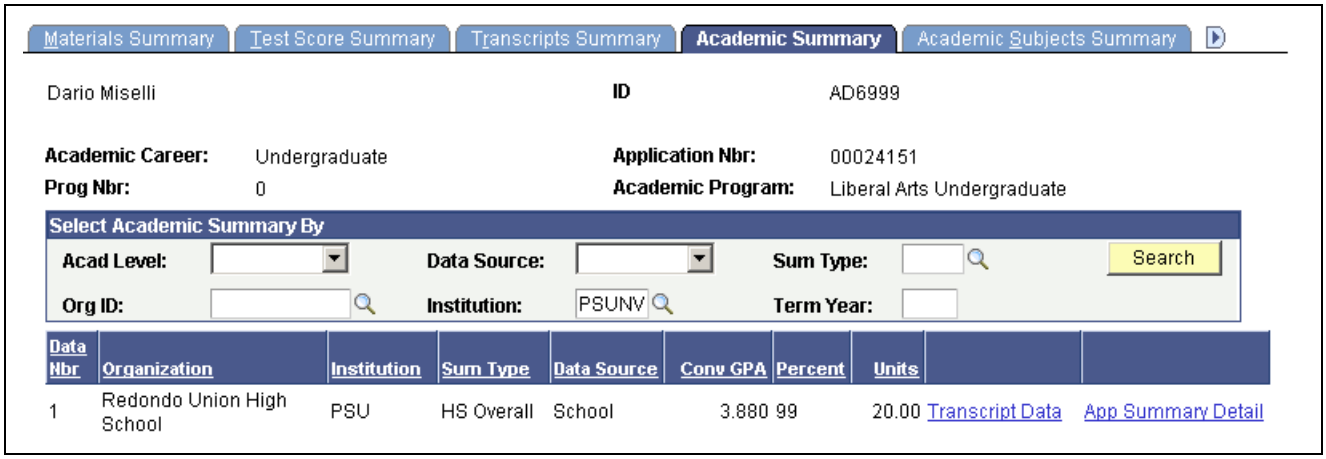
You must first attach materials to the application on the Application Materials page.

Interviewer Detail Click this link to view about interviewer information about this material type. The Interviewer Detail page appears.

Recommender Detail Click this link to view recommender information about this material type. The Recommender Detail page appears.

Viewing Academic Summary Information

Access the Academic Summary page.



Academic Summary page

Acad Level (academic level) Select the academic level for which you want to search for academic summary information.

Org ID (organization ID) Select the organization ID for which you want to search for academic summary information.

Data Source Select the data source for which you want to search for academic summary information.

Institution Select the academic institution for which you want to search for academic summary information.

Sum Type (summary type) Select the summary type for which you want to search for academic summary information.

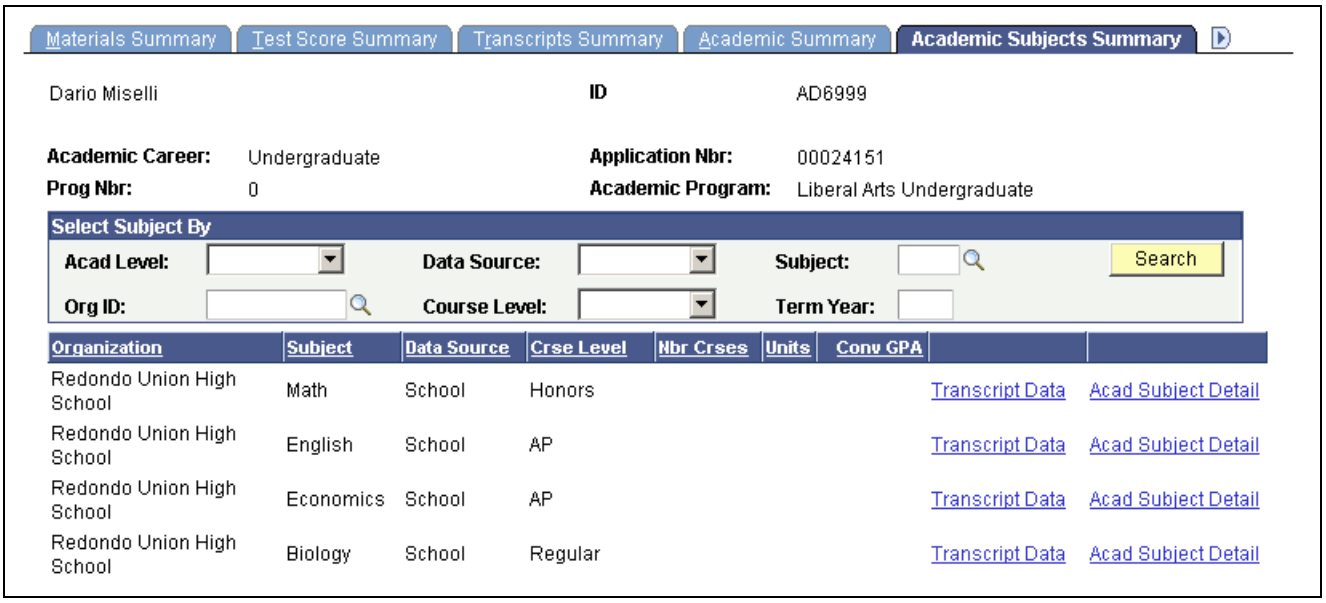
Term Year Select the term year for which you want to search for academic summary information.

Search Click this button to view information matching your search criteria.

App Summary Detail (application summary detail) Click this link to view application summary details. The Application Summary Detail page appears.

Viewing Academic Subjects Summary Information

Access the Academic Subjects Summary page.



Academic Subjects Summary page

Acad Level (academic level) Select the academic level for which you want to search for academic subjects summary information.

Org ID (organization ID) Select the organization ID for which you want to search for academic summary information.

Data Source Select the data source for which you want to search for academic subjects summary information.

Course Level Select the course level for which you want to search for academic subjects summary information.

Subject Select the subject for which you want to search for academic subjects summary information.

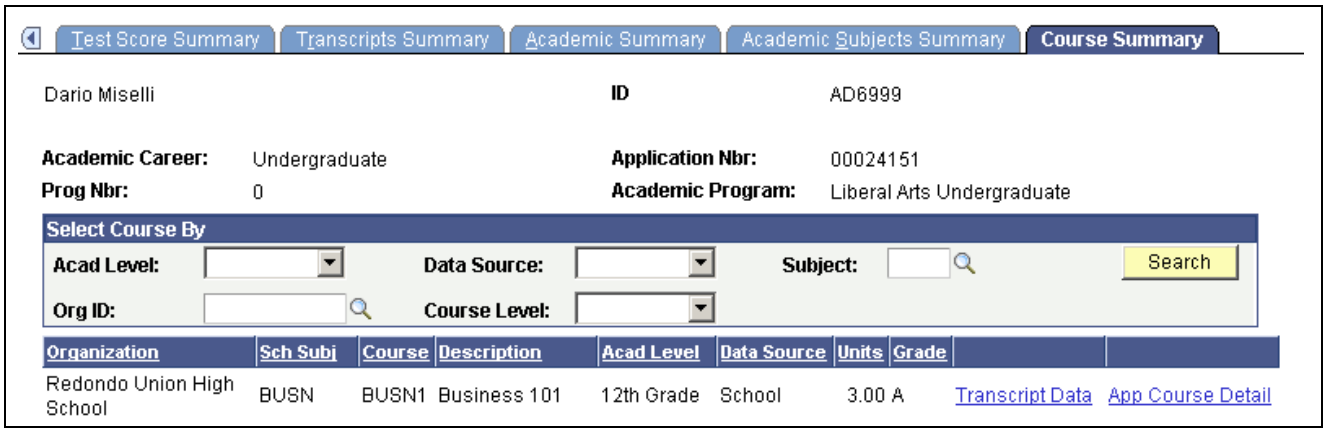
Term Year Select the term year for which you want to search for academic subjects summary information.

Search Click the Search button to view information matching your search criteria.

Acad Subject Detail (academic subject detail) Click this link to view academic subject details. The Application Subject Detail page appears.

Viewing Course Summary Information

Access the Course Summary page.



Course Summary page

You must first attach course summaries to the application on the Application Materials page.

Acad Level (academic level) Select the academic level for which you want to search for course summary information.

Org ID (organization ID) Select the organization ID for which you want to search for course summary information.

Data Source Select the data source for which you want to search for course summary information.

Course Level Select the course level for which you want to search for course summary information.

Subject Select the subject for which you want to search for course summary information.

Search Click the Search button to view information matching your search criteria.

Transcript Data Click this link to view transcript data. The Transcript Data page appears.

App Course Detail (application course detail) Click this link to view application course details. The Application Course Detail page appears.

CHAPTER 13

Viewing Groups of Prospects or Applicants

This chapter discusses how to:

- View prospects and applicants by organization.
- View prospects and applicants assigned to a specific recruiter.

Viewing Prospects and Applicants by Organization

This section discusses how to:

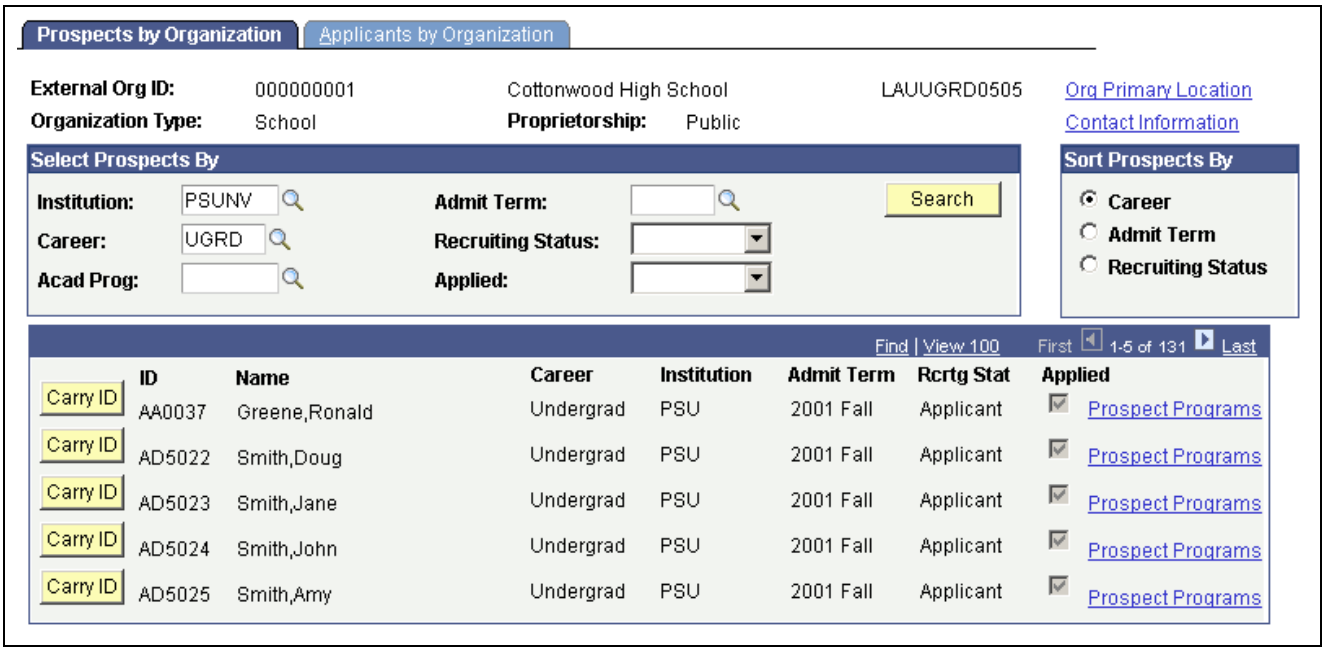
- View prospects by organization.
- View contact information.
- View applicants by organization.

Pages Used to View Prospects and Applicants by Organization

Page Name	Object Name	Navigation	Usage
Prospects by Organization	ORG_PRSP_SUMMARY	Student Recruiting, External Org Summaries, Org Admissions Summary	View lists of prospects that are associated with a particular external organization and display the records in the order you choose. You can narrow the scope to view only certain prospects that are associated with an external organization.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Programs link on the Prospects by Organization page.	View a list of programs for a prospect.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the Org Primary Location link on the Prospects by Organization page.	View the primary address of the organization or school.
Organization School Information	SCHOOL_INFO	Click the Detail button on the Organization Primary Location page.	View additional information regarding a school.
Contact Information	EXT_ORG_CNTCT_SEC	Click the Contact Information link on the Prospects By Organization page.	View any contacts that are associated with this school.
Contact Phone Information	EXT_ORG_CNTCT_PHN	Click the Ext Org Phone/Email button on the Contact Information page.	View phone numbers and email addresses of organization contacts.
Contact Location Information	EXT_ORG_CNTCT_LOC	Click the Address button on the Contact Information page.	View a contact's address.
Applicants by Organization	ORG_APPL_SUMMARY	Student Recruiting, External Org Summaries, Org Admissions Summary	View lists of applicants that are associated with a particular organization or school and display the records in the order you choose. You can narrow the scope to view only certain applicants that are associated with a school.
Program Summary	ORG_APPL_P_SEC	Click the Applicant Programs link to view the Program Summary page.	View a listing of academic programs for an applicant.

Viewing Prospects by Organization

Access the Prospects by Organization page.



Prospects by Organization page

Institution Select the academic institution for which you want to search for prospect information.

Career Select the academic career for which you want to search for prospect information.

Acad Prog (academic program) Select the academic program for which you want to search for prospect information.

Admit Term Select the admit term for which you want to search for prospect information.

Recruiting Status Select the recruiting status for which you want to search for prospect information.

Applied Select whether you want to see prospects who applied to your institution.

Sort Prospects By Select whether you want to view prospects by career, admit term, or recruiting status.

Search Click this button to bring up the prospects that match your search criteria. the system displays matches in the bottom portion of the page.

Carry ID Click this button to carry forward this person's ID to the next page.

Prospect Programs Click this link to view a listing of the academic programs for a prospect. The Prospect Programs page appears.

Org Primary Location (organization primary location) Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.

Contact Information Click this link to view any contacts that are associated with this school. The Contact Information page appears.

Viewing Contact Information

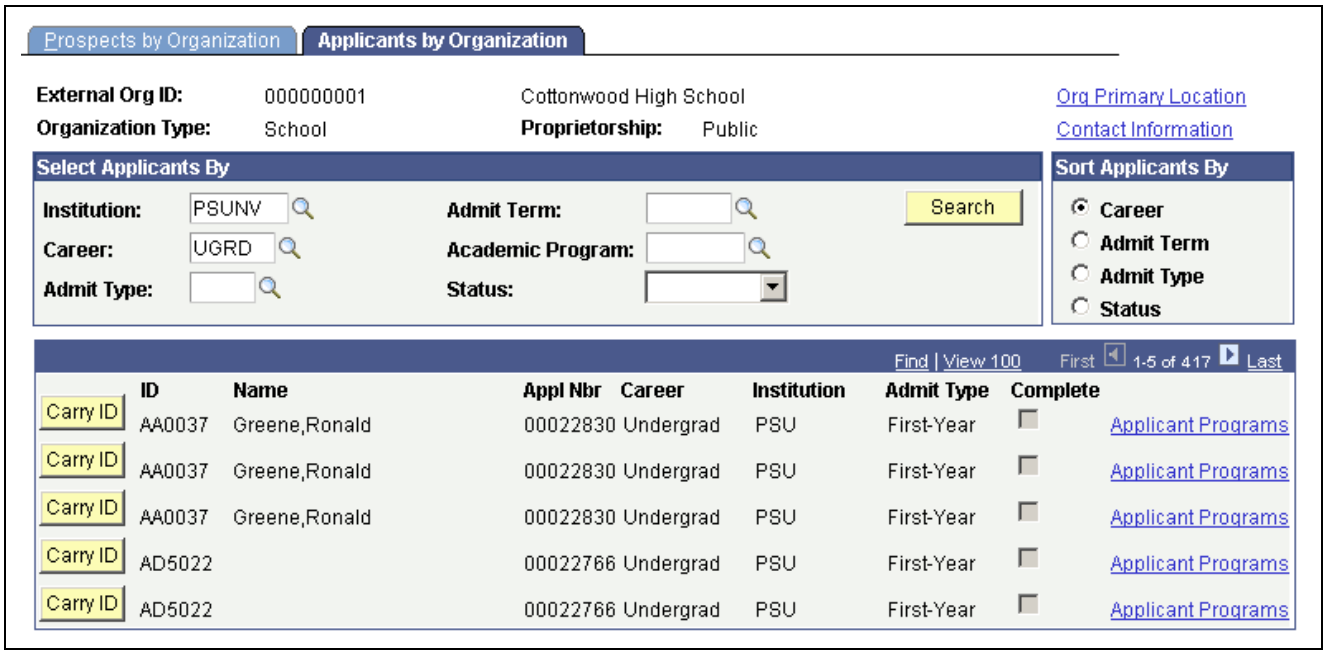
Access the Contact Information page.

Click this button to view phone number and email address information. The Contact Phone Information Page appears.

Click this button on the Contact Information page to view a contact's address. The Contact Location Information page appears.

Viewing Applicants by Organization

Access the Applicants by Organization page.



Applicants by Organization page

Career and Institution These values are based on your user defaults. Edit the values if necessary.

Admit Type Select an admit type.

Admit Term Select the admit term of the applicants you want to view.

Acad Program (academic program) Select an academic program.

Status Select a status to view applicants with a particular program status. For example, you might want to view only those applicants with a *Cancelled* or *Waitlisted* status.

Acad Career (academic career), **Admit Term, Admit Type,** or **Status** Select an option to view prospects by academic career, admit term, admit type, or status.

Search Click this button to view the applicants that your search criteria. The system displays matches in the bottom portion of the page.

Carry ID Click this button to carry forward this person's ID to the next page.

Applicant Programs	Click this link to view a list of programs for an applicant. The Program Summary page appears.
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click this link to view contacts that are associated with this school. The Contact Information page appears.

Viewing Prospects and Applicants Assigned to a Specific Recruiter

This section discusses how to:

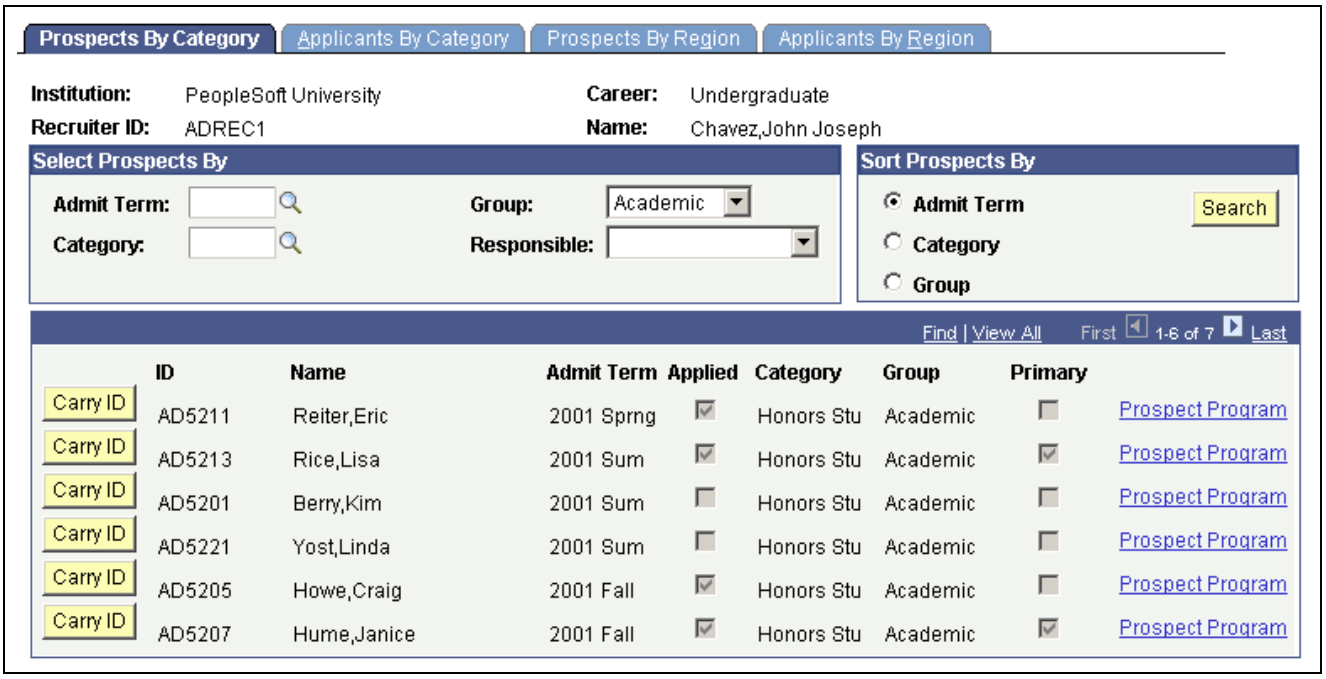
- View prospects assigned to a specific recruiter by category.
- View applicants assigned to a specific recruiter by category.
- View prospects assigned to a specific recruiter by region.
- View applicants assigned to a specific recruiter by region.

Pages Used to View Prospects Assigned to a Specific Recruiter by Category

Page Name	Object Name	Navigation	Usage
Prospects by Category	RCR_PRSP_CAT_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary	View lists of prospects that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Program link on the Prospects by Category page.	View a listing of programs for a prospect.
Applicants by Category	RCR_APPL_CAT_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants by Category	View lists of applicants that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.
Program Summary	ADM_APPL_P_SEC	Click the Program Detail link on the Applicants by Category page.	View a list of programs for an applicant.
Prospects by Region	RCR_PRSP_REG_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Prospects by Region	View lists of prospects that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.
Prospect Programs	ADM_PRSPCT_R_SEC	Click the Prospect Programs link on the Prospects by Region page.	View any program information that exists for a prospect.
Applicants by Region	RCR_APPL_REG_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants By Region	View lists of applicants that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.

Viewing Prospects Assigned to a Specific Recruiter by Category

Access the Prospects by Category page.



Prospects by Category page

Select Prospects By Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.

Admit Term Select an admit term to view prospects for a specific term.

Category Select a recruiting category to narrow which prospects you want to see. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of category.

Note. You cannot search on *REGN* on this page. To search on region, access the Prospects by Region page.

Group Select a recruitment group to search for a broader recruiting group.

Responsible Select a value in this field to see only prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all prospects, regardless of the recruiter's responsibility role.

Admit Term, Category, or **Group** Select an option to view prospects by admit term, category or group.

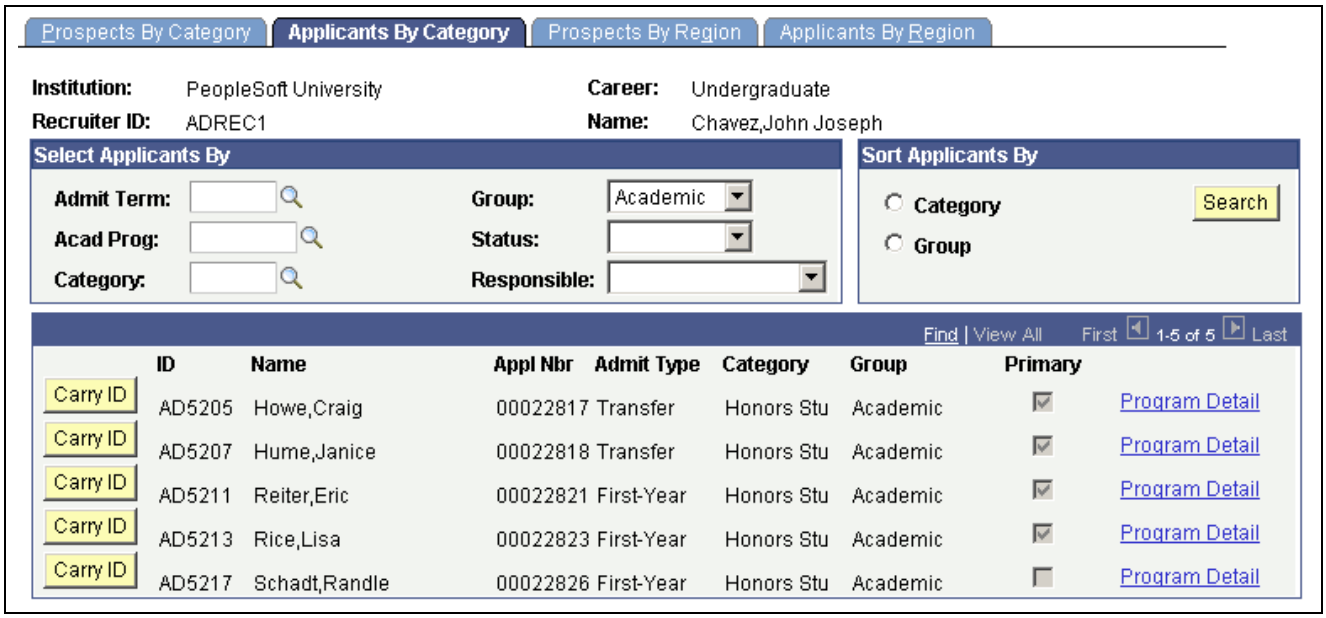
Search Click this button to view prospects that match your search criteria. The system displays matches in the bottom portion of the page.

Carry ID Click this button to carry forward this person's ID to other pages you go to.

Prospect Program Click this link to view a list of programs for a prospect. The Prospect Programs page appears.

Viewing Applicants Assigned to a Specific Recruiter, by Category

Access the Applicants by Category page.



Applicants by Category page

Select Applicants By Enter the appropriate values that designate which applicants you want to see. You must complete at least one field as search criteria.

Admit Term Select an admit term to view applicants for a specific term.

Acad Program (academic program) Select an academic program to specify a particular program.

Category Select a recruiting category to narrow the list of applicants you want to see. Leave this field blank if you want all applicants that are assigned to this recruiter, regardless of category.

Note. You cannot search on *REGN* on this page. To search on region, access the Applicants by Region.

Group Select a recruitment group to search for a broader recruiting group.

Status To view only applicants with a certain program status, select the proper value in the status field.

Responsible Select a value in this field to see only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all applicants, regardless of the recruiter's responsibility role.

Admit Term, Category, Group, or **Status** Select an option to view applicants by admit term, category, group, or status.

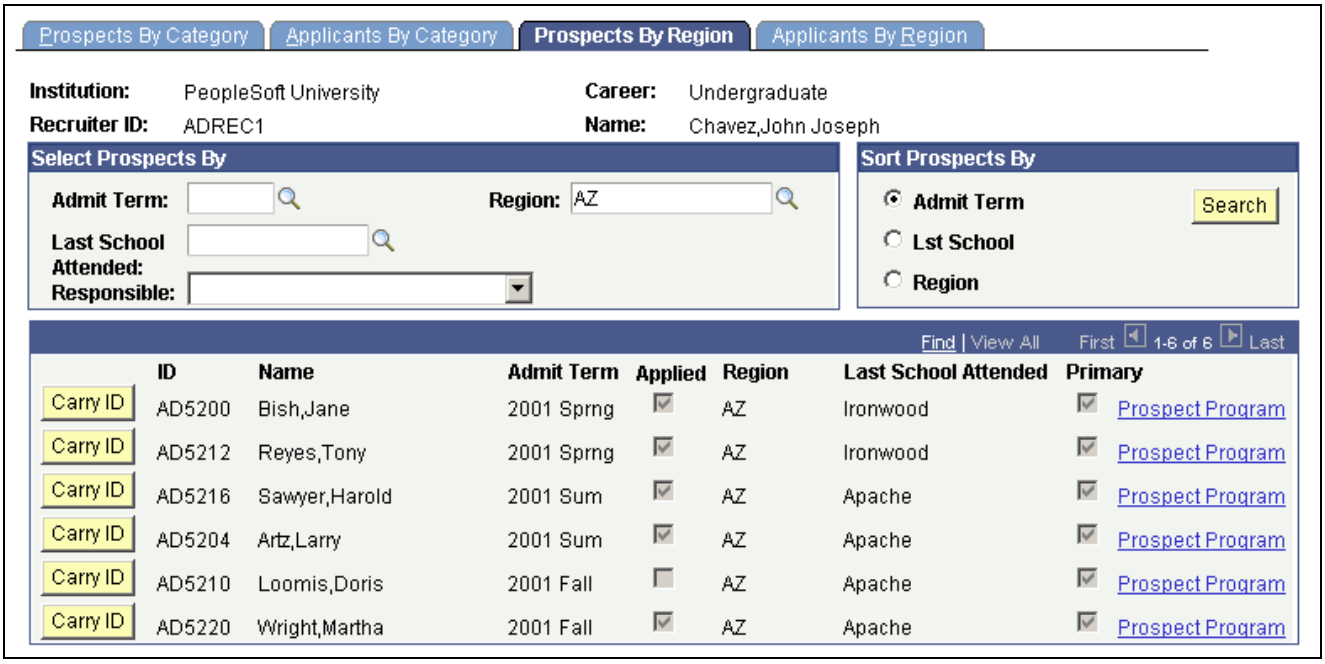
Search Click this button to view the applicants that match your search criteria. The system displays any matches in the bottom portion of the page.

Carry ID Click this button to carry forward this person's ID to other pages you go to.

Program Detail Click this link to view a list of programs for an applicant. The Program Summary page appears.

Viewing Prospects Assigned to a Specific Recruiter, by Region

Access the Prospects by Region page.



Prospects by Region page

Select Prospects By — Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.

Admit Term — Select an admit term to prospects for a specific term.

Region — Select a region to narrow the list of prospects you want to see. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of region.

Last School Attended — Select a last school attended to search for prospects who last attended a particular school.

Responsible — Select a value to view only those prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all prospects, regardless of the recruiter's responsibility role.

Admit Term, Lst School (last school attended), or **Region** — Select an option to view prospects by admit term, last school attended, or region.

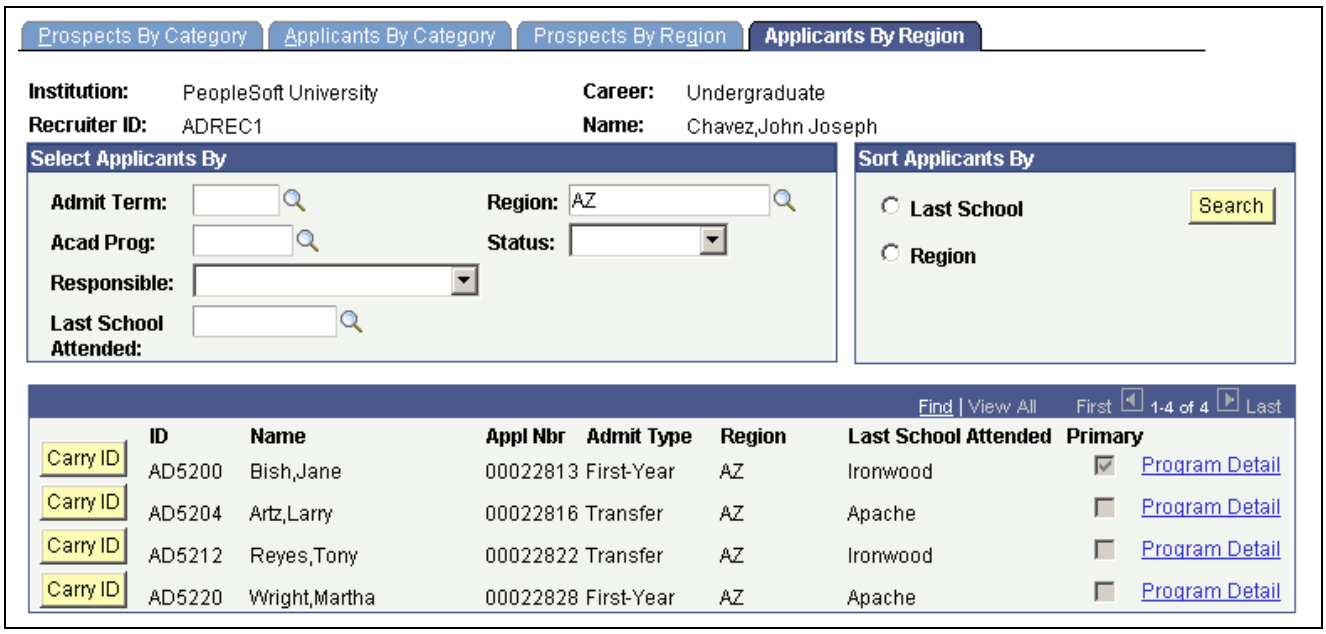
Search — Click this button to view the prospects that match your search criteria. the system displays any matches in the bottom portion of the page.

Carry ID — Click this button to carry forward this person's ID to other pages you go to.

Prospect Program — Click this link to open the Prospect Programs page, where you can view details about the program or programs that are related to a prospect's academic career. The Prospect Programs page appears.

Viewing Applicants Assigned to a Specific Recruiter, by Region

Access the Applicants by Region page.



Applicants by Region page

Select Applicants By — Enter the appropriate values that designate which applicants you want to see. You must complete at least one field as search criteria.

Admit Term — Select an admit term to view applicants for a specific term.

Region — Select a region to narrow the list of applicants you want to see. Leave this field blank to view all applicants that are assigned to this recruiter, regardless of region.

Acad Prog (academic program) — Select an academic program to specify a particular academic program.

Status — Select an application status to view applicants with a particular status.

Responsible — Select a value to view only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not enter a value if you want to select all applicants, regardless of the recruiter's responsibility role.

Last School Attended — Select a last school attended to search for applicants who last attended a particular school.

Admit Term, Lst School (last school attended), or **Region** — Select an option to view applicants by admit term, last school attended, or region.

Search — Click this button to view the applicants that match your search criteria. the system displays any matches in the bottom portion of the page.

Carry ID — Click this button to carry forward this person's ID to other pages you go to.

Program Detail	Click this link to view a list of the programs for an applicant. The Program Summary page appears.

CHAPTER 14

Adding and Updating Applications

This chapter discusses how to:

- Add new applications manually.
- Add new prospects and applications with quick admit.
- Load applications from external test score data.
- Update applications.
- View application summary information.
- Calculate application fees in batch.
- Record an applicant's basis of admission.
- Record comments and conditions of admission.
- Viewing summary checklist, comment, and communication data.

See Also

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 117

Adding New Applications Manually

If the applicants you are entering do not already exist in your database, the system creates them and assigns them identification numbers.

The first two pages in this component store information regarding the applicant as a *person*. This data is shared between all applications for an applicant, as well as with prospect personal data. Updating biographical data here updates it throughout the database. The last three pages in this component, however, are application-specific pages, meaning they store information unique to this *application*. In other words, applications share biographical data but application data is unique to each application.

Avoid entering duplicate applications. Specify on the Installation Defaults - AD page at what level you want the system to warn you that a potential duplicate application exists.

See Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 21.

The Student Admissions , Add Application component is the second of three very similar components:

- Student Recruiting , Create/Update Prospects component.
- Student Admissions, Add an Application component.
- Student Admissions, Maintain Applications component.

Create/Update Prospect and Add an Application have a Biographical Data page and a Regional page. All three components have other pages with similar names such as Prospect Program Data page and Application Program Data page. Use these components to enter or maintain similar information at different times during your business processes: for entering prospects, for entering application data, and for maintaining application data.

This section lists prerequisites and discusses how to:

- Enter or update applicant biographical data.
- Enter or update applicant regional data.
- Enter application program data.
- Enter application data.
- Enter recruiting information for an application.
- Add communications, checklists and comments for applicants.

Prerequisites

Before you begin entering application data, determine if the person is already in your Student Administration database. Often an applicant already has a system ID because an administrator already entered the person as a prospective student. For example, if a person sent test scores to your institution, it is likely that he or she is already in the system.

To see if the applicant is already in your system, select Student Admissions, Application Entry, Search Match.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

Pages Used to Add New Applications Manually

Page Name	Object Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_ENT	Student Admissions, Application Entry, Add Application	Enter program data and academic plan data pertaining to this application. You can also create an enrollment deposit and matriculate an applicant from this page. You must track applications at least at the plan level, but any lower level tracking depends on your office policies.
Evaluation	ADM_APPL_EVAL1_SEC	Click the Evaluation button on the Application Program Data page.	Add an evaluation status for this program.

Page Name	Object Name	Navigation	Usage
Deposit Fees	ADM_APPL_DEP_FEE	Click the Calculate Deposit Fees link on the Application Program Data page.	Calculate a deposit fee when entering a new application. You can calculate the deposit owed for enrollment and post that charge to the person's account directly from the Application Program Data page as part of adding a new application. If the application has a program status of admitted, the Calculate Deposits Fees link becomes available if a value is defined on the Application Center Table
Deposit Fees (entry)	ADM_APPL_ENTRY2_S	Click the Calculate Deposit Fees button or the Deposit Fees link on the Deposit Fees page.	Enter deposit fees for the applicant. **Note.** When this deposit posts in PeopleSoft Student Financials, the system updates the program action to matriculation if you selected the Create Student check box on the Status Update page.
Application Data	ADM_APPL_DATA	Student Admissions, Application Entry, Add Application, Application Data	Enter additional information regarding the application and to calculate an application fee. The system stores data on this page at the *application* level, as opposed to storing it under a person or academic program. This data is relevant to all academic programs being applied to with this application.
Application Fees	APP_FEE_CALC_MSG	Click the Calculate Application Fees link on the Application Data page.	Calculate the application fee that the person owes.
Tender Details	ADM_APPL_TNDRCC_SP	The Tender Details page displays when you select the Credit Card tender category on the Application Fees page.	Enter credit card information. See *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*, "Cashiering," Accepting Student Payments.

Page Name	Object Name	Navigation	Usage
Tender Details	ADM_APPL_TENDER_SP	The Tender Details page displays when you select the Check tender category on the Application Fees page.	Enter check information when you select the Check currency type. See *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*, "Cashiering," Accepting Student Payments.
Currency Conversion	APPL_FEE_CURR_SP	Click the Currency Conversion Details link on the Application Fees page.	Obtain details on the currency conversion. See *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*, "Cashiering," Accepting Student Payments.
Application Items	ADM_APPL_ENTRY3_S	Click the Transaction Summary link on the Application Data page to view information about the Application Fee for this application. The Application Items page opens.	Review information about the Application Fee for an applicant.
Tender Details	PAYMENT_TENDER_SP	Click the Show Tender Details page from the Application Items page.	View tender details.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions, Application Entry, Add Application, Application School/Recruiting	Enter recruiting information about an applicant.

Entering or Updating Applicant Biographical Data

Use the Biographical Data page to enter and update the known biographic/demographic data for this applicant.

If, by performing search/match, you discovered that the person does *not* yet have an ID in your database, the key dialog prompt says *NEW* in the ID field because you are adding a new person as well as a new application. The application number will be all zeros.

Note. Leave the Application Number field as all zeros in order for the auto-numbering feature to work properly.

If you found the person in your search/match and used the Carry ID option, your key dialog prompt lists that person's ID. The application number is still all zeros.

If the person exists in your database, it is a good idea to see if this application has already been entered. You do *not* want to enter a duplicate application. Go to the Maintain Applications component to determine if the person has any current applications.

If you found a matching ID during your search process, the Biographical Data page displays existing data about this person. If you did not find a matching ID during your search process, then you add a new person as well as a new application. The page is blank except for those fields populated according to your user defaults.

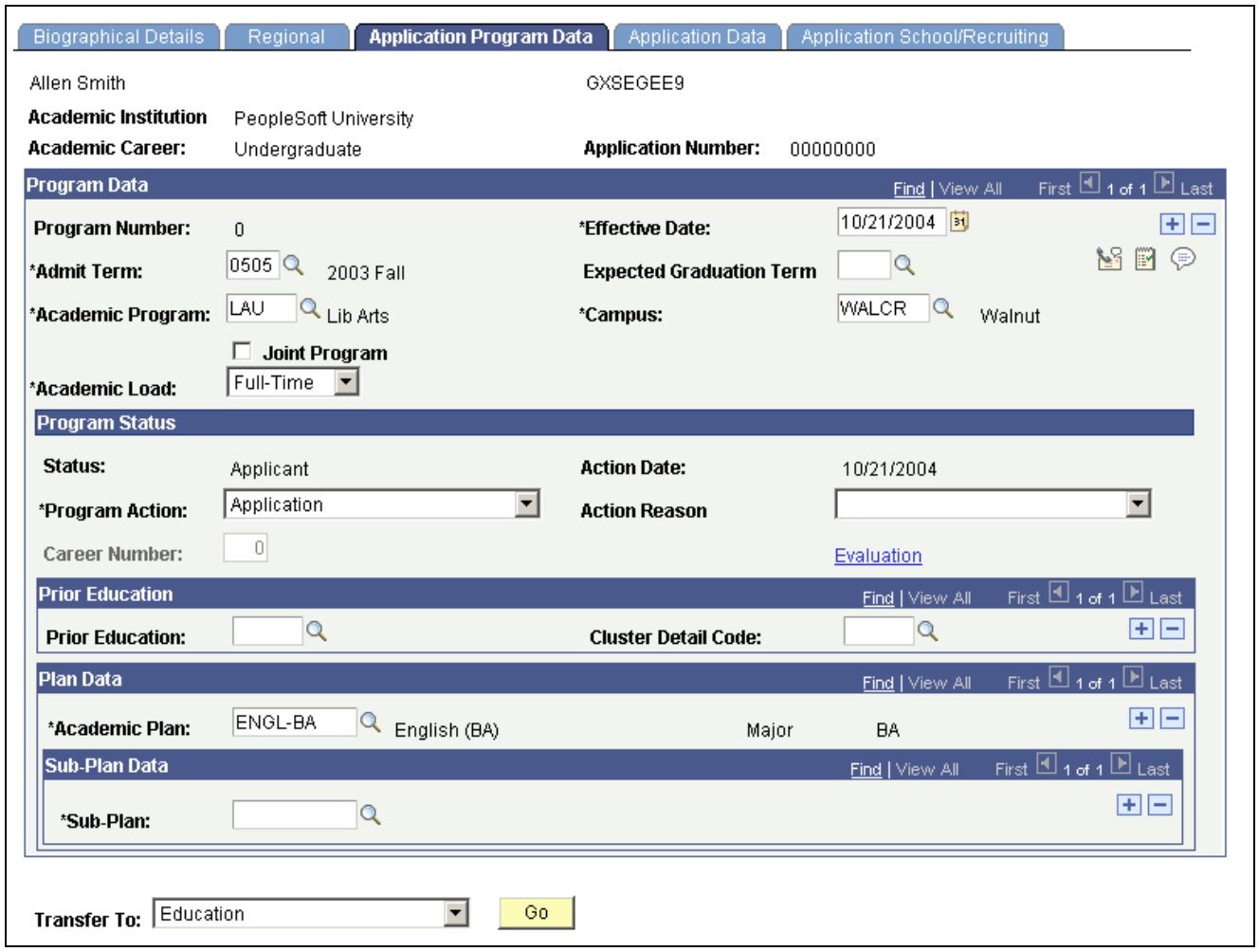
After running a search/match, select Student Admissions, Application Entry, Add Application to add a new application.

Entering or Updating Applicant Regional Data

Use the Regional Data page to enter biographical information specific to your installation country. If this person is already in your database and has existing information, you can view it on this page.

Entering Application Program Data

Access the Application Program Data page.



Application Program Data page

Note. The system fills in most of the fields on the Application Program Data page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, some fields fill in according to those defaults. For example, depending on your default setup, the system might populate academic career, institution, admit term, academic load, and academic program data based on the values in the matching prospect record.

Effective Date Enter an effective date for the application to this academic program if different than the default date. If you are entering the application after the start date of the Admit Term, you need to back date the effective date to a date prior

to the start date of the admit term in order to Term Activate the student once they are matriculated.

Admit Term Select the admit term that the applicant is expected to enroll in if admitted for this application. Define admit terms on the Term Table page. This is a user default field.

Expected Graduation Term Select the term the student expects to graduate.

Academic Program Enter or update the academic program to which the person is applying. Define academic programs on the Academic Program page. This is a user default field.

After you matriculate the applicant, the system copies the application program data to the program/plan tables in PeopleSoft Student Records.

Academic Load Select the academic load that the applicant will be taking on if admitted for this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Full-Time* and *Part-Time.*

Joint Program Select the Joint Program check box if the applicant is applying to a joint program.

Dual Program This field becomes available when you select the Joint Program check box. Select the joint academic program. Define dual programs on the Academic Program page.

Campus Select or update the campus to which the person is applying within your academic institution. Define campuses on the Campus Table page. This is a user default field.

Status Because you are entering a new application, this field automatically displays *Applicant.*

Program Action Because you are entering a new application, this field automatically displays *Application*. This value can be changed. Define program actions on the Admissions Action Table page.

Action Date The default for the action date is your system date. This is the date that the action was actually entered into the system (contrast this with the effective date).

Action Reason If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Action reasons enable you to record a brief explanation of why the program action took place. For example, for the action *Administrative Withdrawal,* you could define a reason of *Incomplete Application.* Define action reasons on the Program Action Reason Table page.

Career Number Available if the Program Action field contains the value Readmit Application. If you want to readmit this applicant for this application into an existing career, you can select the proper career number here. You must also have an admit type where the Readmit Processing Required check box has been selected on the Admit Type Table page. The system readmits the person into the career that corresponds to the career number that you select.

Academic Plan Select the academic plan within the academic program being applied to with this application. An academic plan can be any area of study, such as English,

math minor, physics, or undeclared. Define academic plans on the Academic Plan Table page. This is a user default field.

Sub-Plan If a sub-plan exists for the academic plan, select the sub-plan here. Define academic sub-plans on the Academic Sub-Plan Table page. This is a user default field.

Calculate Deposit Fees Click this link to calculate an enrollment deposit. The Calculate Deposit Fees Page appears.

If your application center has designated a deposit fee code that requires a deposit, and you enter a program status of *Admit,* the Calculate Deposit Fees link appears. You can not exit the component until you calculate the enrollment deposit. Application centers are designated on the Application Data page.

Evaluation Select this link to enter the status of the application. Values for this field are defined on the Evaluation Status Table.

Create Program To matriculate the applicant at the same time you are entering the new application, select *Matriculation*, in the Program Action field. The Create Program button becomes available.

Click the Create Program button to save the component. Also, note that if you selected *Matriculation* in the Program Action field, you are *required* to click the Create Program button (which, again, saves the component) before exiting the component.

After you matriculate a person, the system creates a record in PeopleSoft Student Records. All fields on this page are unavailable because to access the information you need access to pages in PeopleSoft Student Records. Therefore, if you must make a change to this person's record after matriculation, you must do so through the PeopleSoft Student Records menu.

The PeopleSoft Recruiting and Admissions application enables you to record multiple academic programs for one application under an academic career. After you have saved the Application Entry component, however, you must use the Program Addition page to add an additional program. Note that the Prog Number field shows the number of the program in the order it was entered. If you only have one program, it displays "*0*". The next program displays "*1*", and so on.

Before matriculating the applicant, you might want to move to the next page in the Application Entry component first to record additional information about the applicant before you perform the matriculation process.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

(AUS) Australian and (NZL) New Zealand Functionality

Additional fields appear on this page for Australia and New Zealand. They only appear in certain conditions.

(AUS) Mode of Attendance The Mode of Attendance is a required field that is populated on each student's application during the TAC Post Process. This data is required for reporting admissions data back to the TACs via the Enrollment Feedback process as well as DEST reporting. The Mode of Attendance resides on Application Entry, Application Maintenance and Program Addition pages. It is a required field

upon entry of an application. Once the student is matriculated, the Mode of Attendance is carried forward to the student program on record.

(NZL) Funding Source This field is populated at application data entry time and is used in the Single Data Return process. The Funding Source that is entered on the Application Program Data page is used to default the funding source on the Enrollment record for the student.

(NLD) Netherlands Functionality

Additional fields appear on this page for the Netherlands. They only appear in certain conditions.

Form of Study Select the form of study for which the applicant is registering.

Academic Level The academic level can be registered separately from the academic program record.

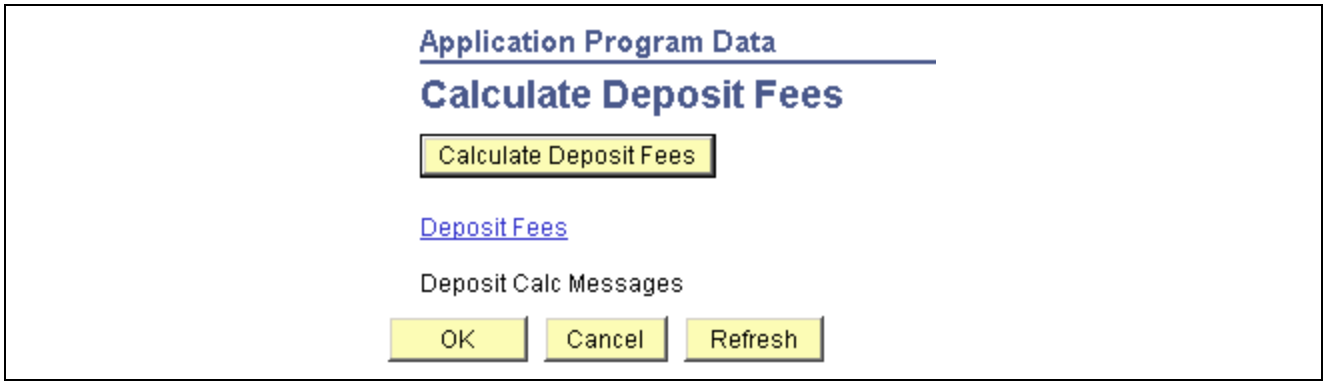
Funding Applies Select this option to indicate whether funding applies.

Prior Education Before a student can enrol in a program he has to meet certain requirements concerning his or her curriculum. One is these requirements is the fact that he/she has obtained a diploma from their previous school. The diploma received will reflect a specific level of education. Individual exam results are relevant. On a student level all prior education, including information about the school(s), courses taken and subjects passed, have to be registered.

Note. To make changes to this page after it has been saved, you must do so through the Maintain Applications component. If you are only entering one program for the applicant, enter only one program action on the Application Program Data page. You must enter additional program actions through the Maintain Applications component. For example, suppose you enter the application initially with a program action of APPL in the Add Application component. When you admit the applicant, you would enter the program action of Admit in the Maintain Applications component.

Using the Calculate Deposit Fees Page

Access the Calculate Deposit Fees page.



Calculate Deposit Fees page

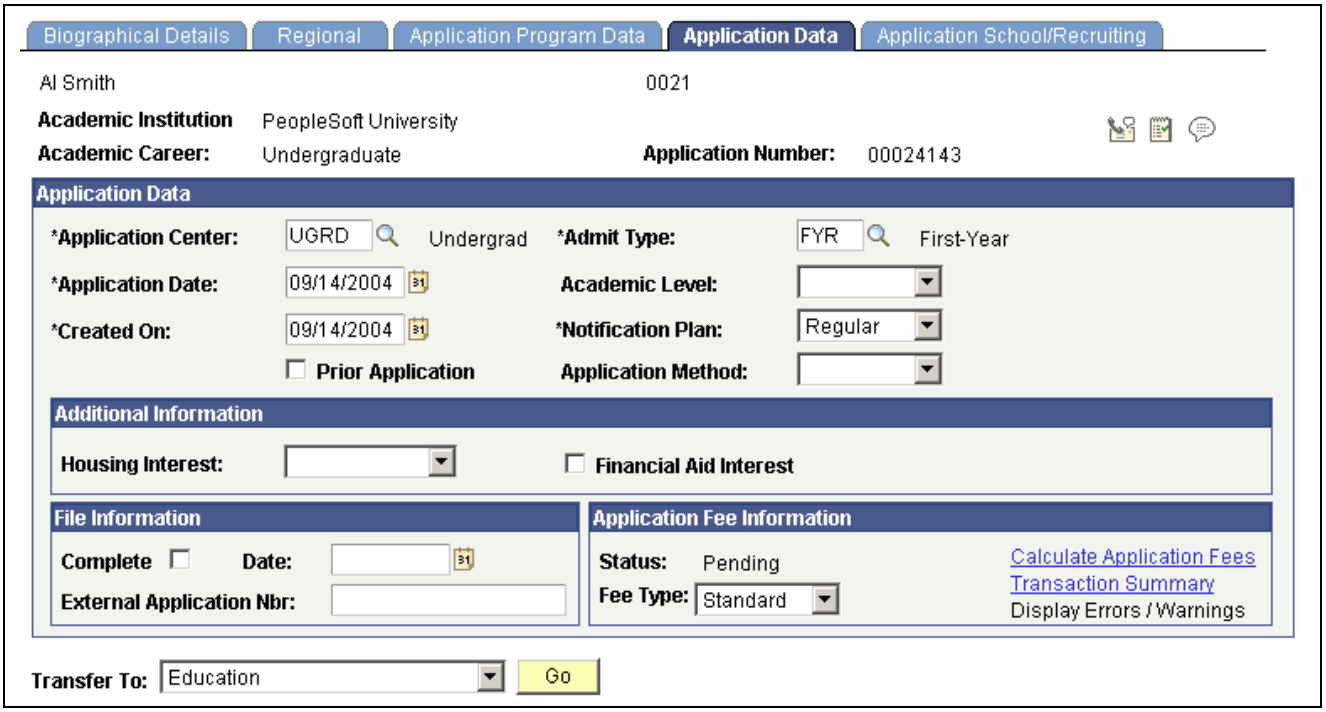
Calculate Deposit Fees Click this button to calculate an enrollment deposit fee. The Deposit Fees Page appears.

Deposit Fees Click this link to view details about this person's enrollment deposit. The Deposit Fees Page appears.

Deposit Calc Messages (deposit calculation message) Click this link to view messages that occur while trying to calculate deposit fees. This link becomes available when the system generates a message.

Entering Application Data

Access the Application Data page.



Application Data page

Note. The system fills in most of the fields on this page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, some fields will be filled in according to those defaults.

Application Center Select the application center that will process this application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page. This is a user default field.

Admit Type Select the admit type for this applicant regarding this application (such as *First-Year* or *Transfer,* for example). Define admit types on the Admit Type Table page. This is a user default field.

Application Date The default for the application date is the system date that the application was received. You can override this default.

Academic Level Select the academic level to which the applicant is applying for admission with this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Freshman, Graduate, Junior, Not Set,* and *Post-Baccalaureate.* This is a user default field.

Created On The default for the created date is the system date on which you create this application record.

Notification Plan Specify whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admit, Regular,* and *Rolling.*

Prior Application Select this check box if this applicant previously applied to this career. This selection is useful for informational and reporting purposes.

Application Method Select how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Application Service, Diskette, Hard Copy, Web Application, EDI,* and *OUAC.* This is a user default field.

Housing Interest Select any housing interest indicated by the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Commuter, Off Campus,* or *On Campus.* This is a user default field.

Financial Aid Interest Select this check box if this applicant is interested in financial aid for the programs to which he or she is applying. This field is useful for informational and reporting purposes. For example, the financial aid office can run reports listing those applicants interested in financial aid. This is a user default field.

Complete Select this check box if this application is not missing any information and is considered complete by your office.

Date Enter the date that you marked this application as complete.

External Application Nbr (external application number) Enter the external application number if you received this application from a service with its own application-numbering scheme.

Fee Type Select the type of fee assigned to this application. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), International,* and *Standard.* These fee types enable you to charge varying user-defined application fees.

Calculate Application Fees After selecting the fee type, click this link to calculate the application fee owed. The Application Fees Calculation process runs and the Application Fees Page appears. The system displays the calculated fee amount.

When you return to the Application Data page, the Status field in the Application Fee Information group box displays *Calculated.*

If your application fee is set up to post to PeopleSoft Student Financials, the application fees calculation process runs when you click the Run button on the Application Fees page. A COBOL posting program runs which creates an account for this person in PeopleSoft Student Financials.

Transaction Summary Click this link to view information about the application fee for this application. The Application Items Page appears.

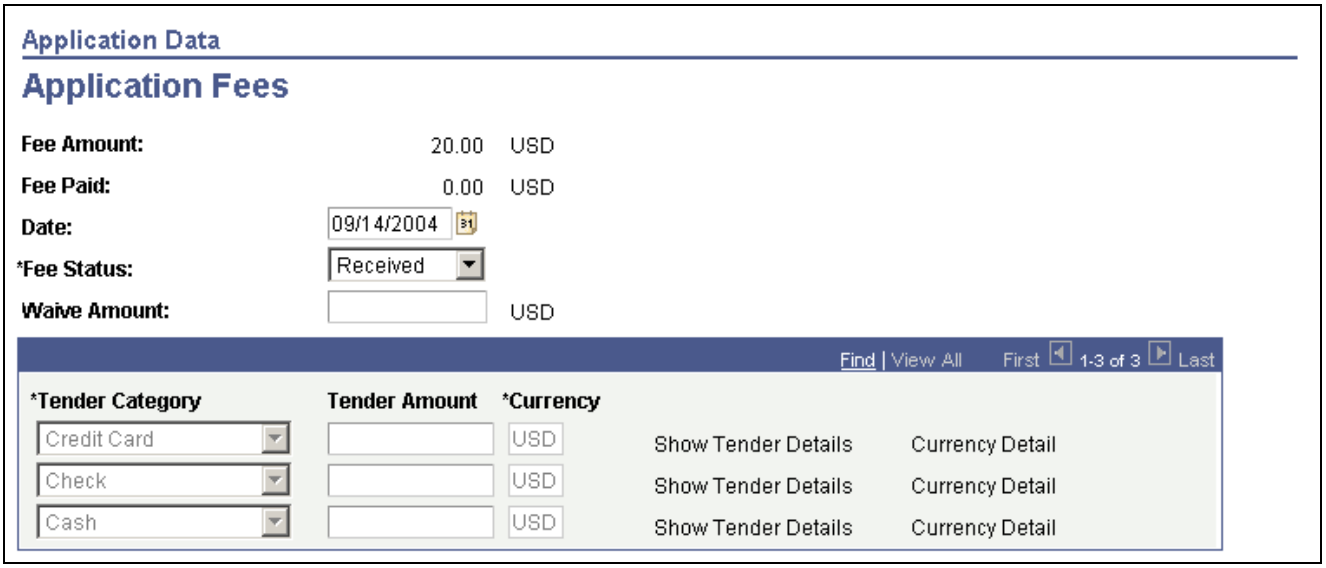
Display Errors/Warnings If any errors occurred during the calculation, click this link to view error details.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Note. After this page has been saved, you make changes to this application in the Application Maintenance component.

Application Fees Page

Access the Application Fees page.



Application Fees page

Date The default for this date is your system date. Edit this field to reflect the date the application fee was entered or waived.

Fee Status Select a status for this application fee. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Received, Pending,* and *Waived.* If you are receiving the application fee, change the status of the fee to *Received.* After you change the status to *Received,* the fields in the bottom section of the page become available.

Waive Amount Enter the amount of the application fee that will be waived, if appropriate.

Tender Category If the fee has been received, use this field to designate how the payment was received. You have the flexibility to receive payments in multiple tenders. For example, you can waive a portion of a fee and the student's remaining payment can be split between a credit card and a check. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Credit Card, Check,* or *Cash.*

If you select *Credit Card,* the Tender Details page appears so you can enter credit card information.

If you select *Check,* the Tender Details page appears so you can enter check information.

Tender Amount After selecting a form of payment, enter the amount tendered.

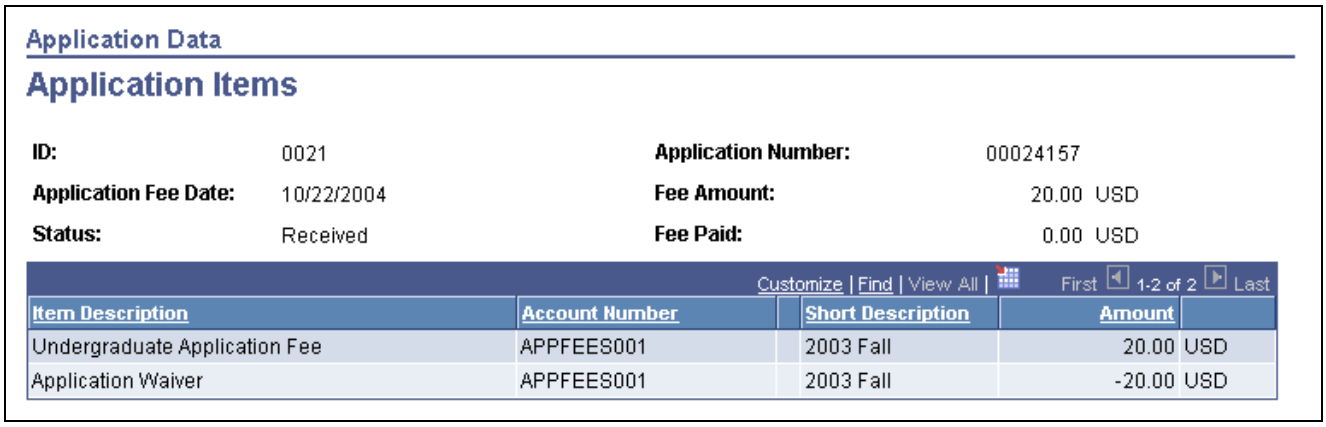
Currency Select the type of currency, such as *USD* (US Dollars).

Currency Conversion Details Click this link to obtain details on the currency conversion. The Currency Conversion Page appears.

Show Tender Details Click this link to view details about the application fee. The Tender Details page appears.

Application Items Page

Access the Application Items page.



Application Items page

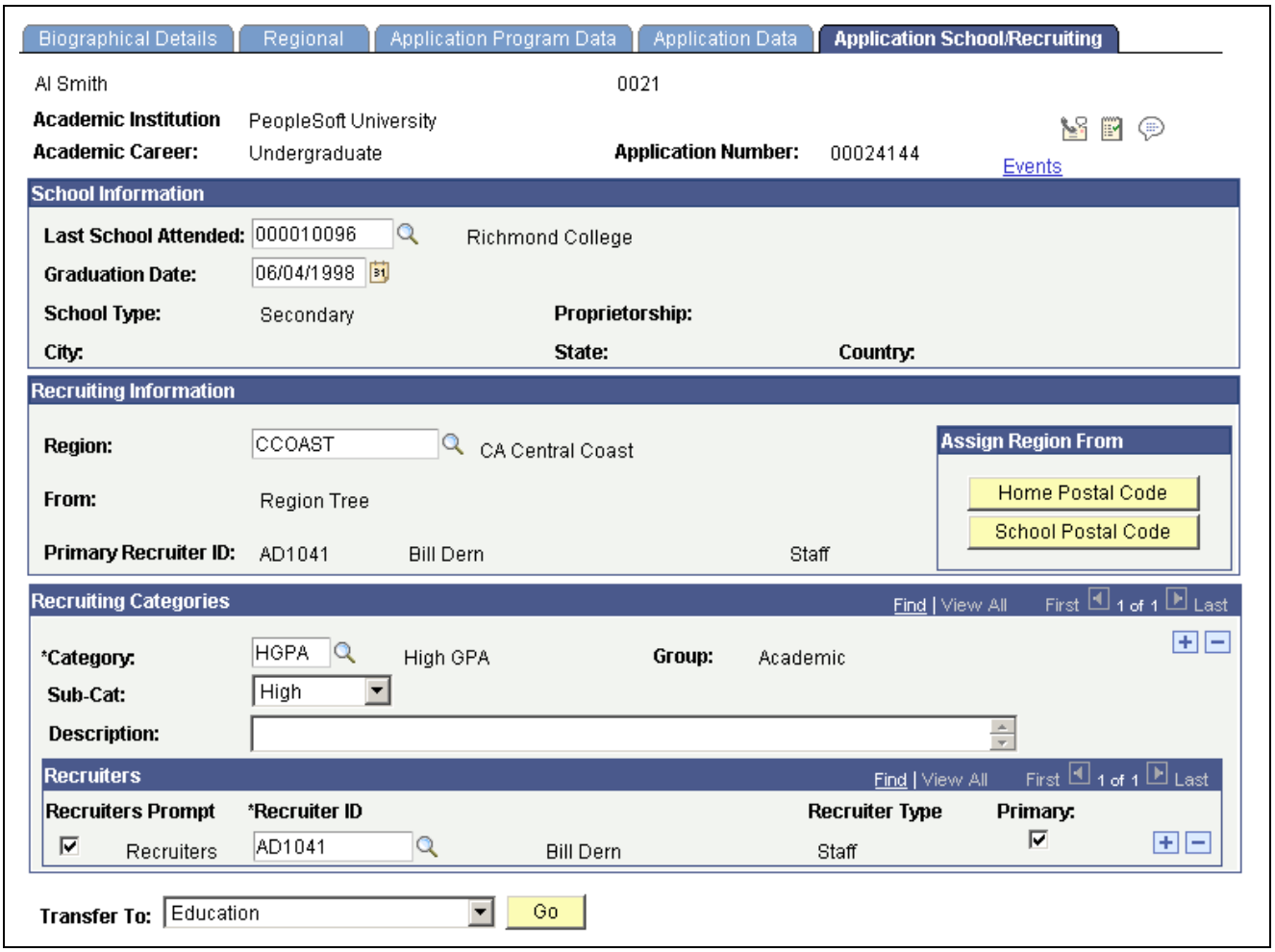
Errors If any errors occurred during the calculation, click the Display Errors button to view error details.

Show Tender Details Click this link to view tender details. The Tender Details Page appears.

Note. To view a summary of a person's financial account, access the Customer Accounts page in PeopleSoft Student Financial.

Entering Recruiting Information for an Application

Access the Application School/Recruiting page.



Application School/Recruiting page

Note. If the applicant had a prospect record, and you selected the Move to Application option on the Prospect Recruiters page, and your setup dictates that data from the prospect record be copied to the application, the system automatically populates some of the fields on this page. For example, the Last School Attended and Graduation Date fields could be populated by the values in the matching prospect record.

School Information

Last School Attended Select the last school attended for this applicant. Because a person might have attended several schools in his or her external academic career, it is helpful to know which school was attended most recently. This is a user default field.

Upon the first save of the application, the value entered in this field is added to the Education component automatically. After you enter a school, you might receive a message informing you that this school will not be added to the Academic History record, depending on how your institution has set this parameter on the Installation - AD page. Schools are stored for academic history in the Education component. The school you store here is for recruiting and informational purposes.

Graduation Date Enter the graduation date. A graduation date can be in the future if the person is still attending this school.

Recruiting Information

Region Select a region if you want to choose a region from the region tree manually. Only regions from your region tree are available for selection. Define regions on the Region Table page.

Home Postal Code Click this button if you want the system to assign a region based on the postal code in the applicant's home address. The system uses the tree manager to assign a region based on the postal code.

School Postal Code Click this button if you want the system to assign a region based on the applicant's last school attended postal code. The system uses the tree manager to assign a region based on the postal code.

From This display-only field shows you how this region was defined:

Region Tree: If you *manually* assigned a region.

Address: Assigned if you click theHome Postal Code button.

School: Assigned if you click the School Postal Code button.

Recruiting Categories

Use the fields in this group box to target the applicant for special recruiting efforts during the admissions process regarding this application.

Category Select a recruiting category for the applicant under this career and application. For example, in the previous screen example, this applicant is being recruited according to the geographic region of her school. Define recruiting categories on the Recruiting Category Table page. These same categories are used in both the recruiting and application processes to target and report on students.

If you plan to assign a recruiter to this applicant based on your region tree, you must enter a category of *REGN* (region). Only the recruiters assigned to the region appearing in the Region field will be available.

Group The group under which this category falls automatically displays when you move out of the Category field.

Sub-Category Select a recruiting subcategory, if desired. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), High, Low,* and *Medium.* A subcategory can be used to indicate the priority of this recruiting category.

Description Enter any descriptive information regarding the recruiting category.

Note. You can enter multiple recruiting categories and supporting information for an application.

Recruiters

This group box becomes available if you have entered a recruiting category. The recruiter assignment is tied to the recruiting categories. Use this section of the page to assign one or more recruiters, pertinent to this category, for the applicant.

Recruiters Prompt Select this check box if you want *all* recruiters in your database to be available when you prompt on the Recruiter ID field, regardless of the recruiting category to which recruiters are assigned.

Clear this check box if you want *only* the recruiters assigned to the current recruiting category to be available when you prompt on the Recruiter ID field. (Note that the *REGN* category works differently).

If you are adding recruiters for the recruiting category *REGN,* you select only from recruiters who were assigned the region that appears in the Region field.

If you entered the region according to the last school attended using the School Postal Code button; the Prompt Table field displays *Recruiters for School's Region.* Select the prompt to bring up any recruiters assigned to that school. If no recruiters are assigned to that school, then your choices are any recruiters assigned to the region.

If you entered the region according to the applicant's home address using the Home Postal Code button, the Prompt Table field displays *Recruiters from Address Region.* Click the prompt to bring up all recruiters assigned to the region.

If you manually chose the region from the region tree, all recruiters assigned a recruiting category of *REGN - Region* are available when you prompt for values on the Recruiter ID field. The Prompt Table display field in this case displays *Recruitment Category.*

Recruiter ID Select the ID number of the recruiter that you want to assign to this applicant. The region tree determines which recruiters to make available for selection, based on the region that you assigned to the applicant.

You can override the region tree selection by selecting theRecruiters Prompt check box. If selected, all recruiters for the academic career are available.

You can assign an applicant multiple recruiters for any recruiting category.

Primary Select this check box if this is the primary recruiter for this category.

The ID of the person who has been marked primary displays in the Prmy Recruiter ID (primary recruiter ID) field. You can use this field to report on primary versus non-primary recruiters.

Events Click this link to sign an applicant up for attendee events. The Attendee Events page appears.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Note. After you save the information on these pages, all modifications must be made on the Application Recruiters page in the Application Maintenance component.

Adding Communications, Checklists and Comments for Applicants

The Communication, Checklist and Comment buttons appear next to the Application Number field on the Application Data, Application School/Recruiting, and Application Recruiters pages, and next to the Expected Graduation Term field on the Application Program Data page.

By using the Communication, Checklist and Comment buttons from this component, A new window is opened for the entry pages for communication, checklist, and comments and initiate recruiting and admissions related items.

If the Communication, Checklist or Comments Pages are Accessed From the:	The Variable Data for the Following Administrative Function is Supplied:	Data that is Transferred
Application Program Data page	ADMP Admissions Program	ID, academic career. student career number, application number, application program number.
Application Data page	ADMA Admissions Application	ID, academic career, student career number, application center.
Application School/Recruiting page	EVNT Event	ID

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Using the 3C Engine"

Adding New Prospects and Applications with Quick Admit

PeopleSoft Recruiting and Admissions can take information concerning people enrolled from the PeopleSoft Student Records QuickAdmit process and at your discretion, create a prospect record and an application, or an application only for those people.

This section provides an overview of quick enroll and quick admit and discusses how to:

- Select which students you want to quick admit.
- Create applications for the group of quick-admitted students.

Understanding Quick Enroll and Quick Admit

The Quick Admit a Student component, Quick Enroll and Student component, and Quick Admit Batch Apps component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you'll use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick admitted might come in handy for various funnel reports.

The Quick Admit a Student component and Quick Enroll a Student component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes.

The Quick Admit a Student component works concurrently with the Quick Admit Batch Apps component. Whenever you admit a student through the Quick Admit a Student component, the system flags the student's record to indicate that the student has been admitted by this method. The system then places these records into a temporary table awaiting your action. Using the Quick Admit Batch Apps component, you can then run the Quick Admit Process (ADQCKADM) to create prospect records and applications for these flagged records in the temporary table. The Quick Admit Batch Apps component and Quick Admit a Student component are not a replacement for the regular PeopleSoft Recruiting and Admissions functionality. You must use the Application Data pages for regular admissions.

You can use the Quick Admit a Student component to add a new student's personal data record to your system, to activate a student into an academic career and an academic program within that academic career, and to activate a student into a specific term. By completing and saving the Quick Admit a Student component, a student quickly becomes eligible for class enrollment. You can also use the Quick Admit a Student component to update a new or continuing student's personal data record after the student already has an existing personal data record stored in the system. If you are entering new students into the system through the Quick Admit a Student component and you click the Save button after entering the student's biographical data and program data, the system assigns the student a unique ID that remains associated with the individual in your database until you change or delete it. Keep in mind that each user has access to specific edit modes based on her or his security profile.

Important! To avoid creating duplicate IDs in your system, we strongly recommend that you use the search/match function to determine if an individual with the same data already exists in your database before adding the new individual.

For new students, you can use the Quick Admit a Student component to enter the biographic, demographic, address, and program data about the student. When you save the component, the system:

- Assigns the new student an ID and creates a row for the student in the person tables.
- Activates the new student in the academic program that you select within the specific academic institution and academic career that you specify.
- Activates the new student in the term that you select, creating a row in the student term table (STDNT_CAR_TERM) for the student.

For continuing students, you can use the Quick Admit a Student component to activate the student into a subsequent term; or to activate the student into a new academic career. When you save the component, the system:

- Updates the data for the student in the person tables.
- Verifies whether the student has already been activated for the term, and if not, activates the student in the term, creating a new row in the student term table (STDNT_CAR_TERM) for the student.
- Activates the continuing student in the new academic program that you select within the specific academic institution and career that you specify when you are adding the student to a new academic career.

After you have saved the student's biographical data and activated the student into the term, the student is eligible for class enrollment. You can then use the Quick Enroll a Student component to rapidly enroll students into the term. The system carries forward the key information (ID, academic institution, academic career, and term) and automatically opens the Quick Enroll a Student component for the given student.

When you access the Quick Admit a Student component, a dialog box prompts you to enter the key values of the admissions transaction. The key values are:

ID In add mode, the system defaults the student's ID to *New.* For a student new to your system, you can use the default value to have the system assign

the ID, or you can enter a new ID of your choice provided that it does not belong to another individual already in the system , or you can enter a student's existing ID.

In other modes, the system prompts you to search for an existing ID.

If you enter a new ID of your choice, you run the risk of disrupting the auto-numbering sequence that is included with the system. If you disrupt the auto-numbering sequence, a system administrator must correct the situation.

Academic Institution Select the academic institution to which you want to quickly admit the student.

Academic Career Select the academic career to which you want to quickly admit the student. Remember that academic careers are parents of academic programs. Therefore, when you select an academic program on the Program/Plan page within this component, the system displays academic programs based only on the academic career you select here.

Term Select the term for which you want to activate the student. After you enter the required data for a student into the Quick Admit a Student component and click the Save button, the system activates the student into the term that you specify. This functionality works for both new and continuing students.

To use the Quick Admit feature for a specific term, you must already have defined your academic term calendar for the academic programs within that term.

Note. Quick Admit uses the Max Program Effective Date for Term field from the Term/Session Table when populating the Effective Date on Student Program/Plan. If the current date is less than or equal to the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to current date. If the current date is greater than the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to the Max Program Effective Date defined for activation term.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Establishing Terms and Sessions".

Add Click to open the component with the specified key values.

The Quick Admit Batch Apps process is a two-step, two-page process. Use the first page in the Quick Admit Batch Apps component, the Selection Criteria page, to select a group of students who have been admitted through the Quick Admit a Student component. Use the second page in the Quick Admit Batch Apps component, the Assignment Criteria page, to specify whether to create historical prospect and application records or new prospect and application records, or both.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Processing Class Enrollment Transactions"

Pages Used to Add New Prospects/Applications with Quick Admit

Page Name	Object Name	Navigation	Usage
Quick Admit - Biographical Details	SCC_BIO_DEMO_PERS	Records and Registration, Enroll Students, Quick Admit a Student	Enter or update a student's biographic and demographic information.
Quick Admit - Regional	SCC_BIO_DEMO_REG	Records and Registration, Enroll Students, Quick Admit a Student, Regional	Enter or update a student's information according to regional data requirements.
Quick Admit - Program/Plan	PROGRAM_PLAN	Records and Registration, Enroll Students, Quick Admit a Student, Program/Plan	For new students, select the primary academic program for which you want to activate the student in a term and enter other program stack information. For continuing students, view the student's career number and primary academic program or add the student to a new academic career. If you want make any changes to a new or continuing student's program stack information after you save the student to your system, you must use the Student Program/Plan component.
Quick Admit - Selection Criteria	QUICK_ADMIT_SELECT	Records and Registration, Enroll Students, Quick Admit Batch Apps	Enroll students into classes without going through a formal admissions process.
Quick Admit - Assignment Criteria	QUICK_ADMIT_CREATE	Records and Registration, Enroll Students, Quick Admit Batch Apps, Assignment Criteria	Create applications for the group of quick-admitted students that you selected in the first page of this component.

Entering Biographical Details

Access the Quick Admit - Biographical Details page.

This page is part of the Quick Admit a Person feature, which enables you to rapidly admit students into your institution. The system saves any biographic and demographic data that you add or change to the person tables You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

See Chapter 14, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 174.

Entering Regional Data

Access the Quick Admit - Regional page.

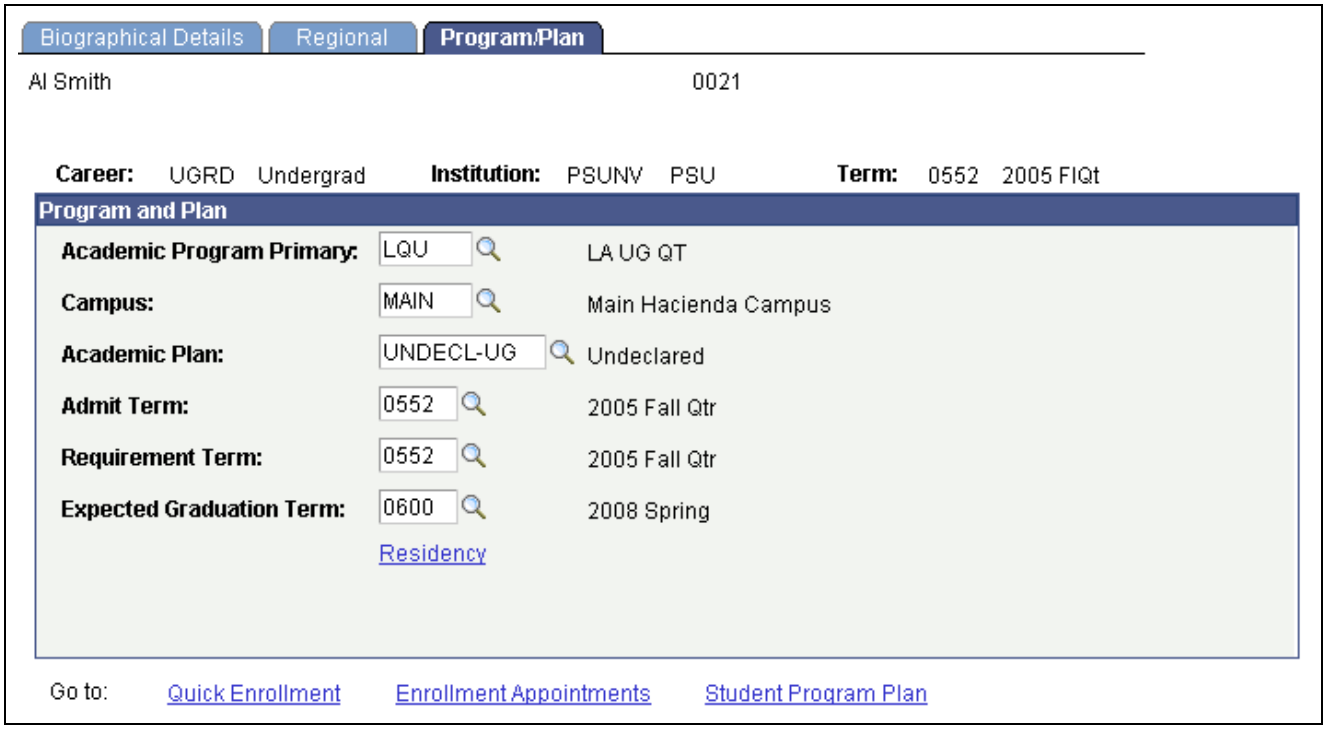
This page is part of the Quick Admit a Student feature, which enables you to rapidly admit students into your institution. The system saves the regional data that you add or change to the person tables. You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information"

Entering or Viewing Academic Program Data

Access the Quick Admit - Program/Plan page.



Quick Admit - Program/Plan page

Entering Program Stack Data for New Students

When you are adding a new student to your system, the following fields appear:

Academic Program Primary (academic program primary) — Select the primary academic program into which you want to matriculate and activate the student. The system prompts you with academic career values specific to the academic career that you selected as a key upon entering the component.

Campus — Select the campus on which the student is going to take the primary academic program.

Academic Plan — Select the student's primary academic plan within the primary academic program. If a student requests multiple academic plans within the academic program, you must enter the additional academic plans through the Student Program/Plan component.

Admit Term The term in which you are matriculating the student into the academic program. The admit term normally comes from the PeopleSoft Recruiting and Admissions matriculation process by default. However, because you are performing a quick activation and are going to matriculate the student through this Quick Admit a Student component, you must therefore select the admit term for the primary academic program that you have specified.

Requirement Term The requirement term indicates to the system which term's degree progress requirements apply to the student for the primary academic program that you have specified. The system, by default, sets this value to the Admit Term value.

Expected Graduation Term Select the term in which you expect the student to graduate. Define term values on the Term Table page.

Residency Click to display the Residency Official page. You can use this page to record residency information that has been verified by your institution.

(NZL) Funding Source Funding source is country specific, and is used only by New Zealand institutions.

(AUS) Mode of Attendance The Mode of Attendance is a required field that is populated on each student's application during the TAC Post Process. This data is required for reporting admissions data back to the TACs via the Enrollment Feedback process as well as DEST reporting.

Quick Enrollment Click to access the Quick Enroll component, where you can process enrollment transactions for the student.

Enrollment Appointments Click to access the Appointments component, where you can add and update enrollment appointments for the student.

Student Program Plan Click to access the Student Program/Plan component, where you can make any changes to a new or continuing student's program stack information after the student has been saved to your system.

Viewing Program Stack Data After Saving the Component

When you are updating a new or continuing student's records, only the following fields appear:

Student Career Nbr (student career number) The system uses the student career number to differentiate between academic programs within the same academic career. For students with multiple academic programs within the same academic career, you must select the student career number for which you want to activate the student into the term you have specified. If the student has only one student career number in a specific academic career, the field is unavailable for edit.

Prim Prog (primary program) The system displays the primary academic program associated with the student career number. The primary academic program that appears is the academic program into which the system activates the student for the term that you have specified.

See Also

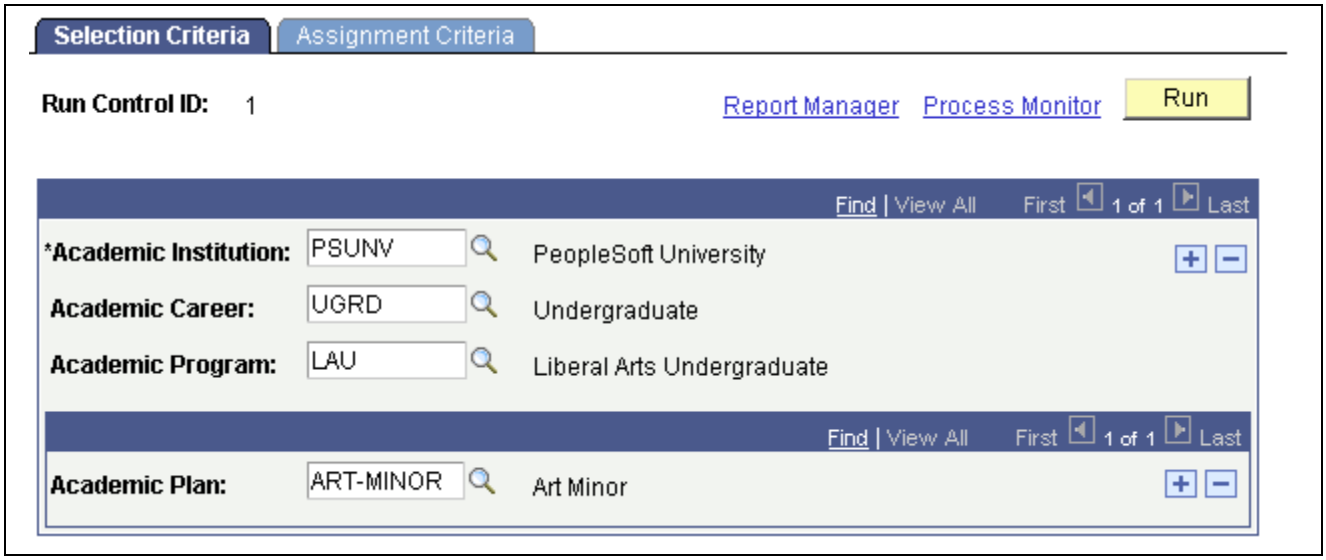
PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information"

Chapter 14, "Adding and Updating Applications," Understanding Quick Enroll and Quick Admit, page 186

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Identification Data," Entering Residency Data

Selecting Your Criteria for Quick Admit Batch Apps

Access the Quick Admit - Selection Criteria page.



Quick Admit - Selection Criteria page

Academic Institution Select the academic institution from which you want to select quick-admitted students. You can enter multiple academic institutions. You must enter at least on Academic Institution.

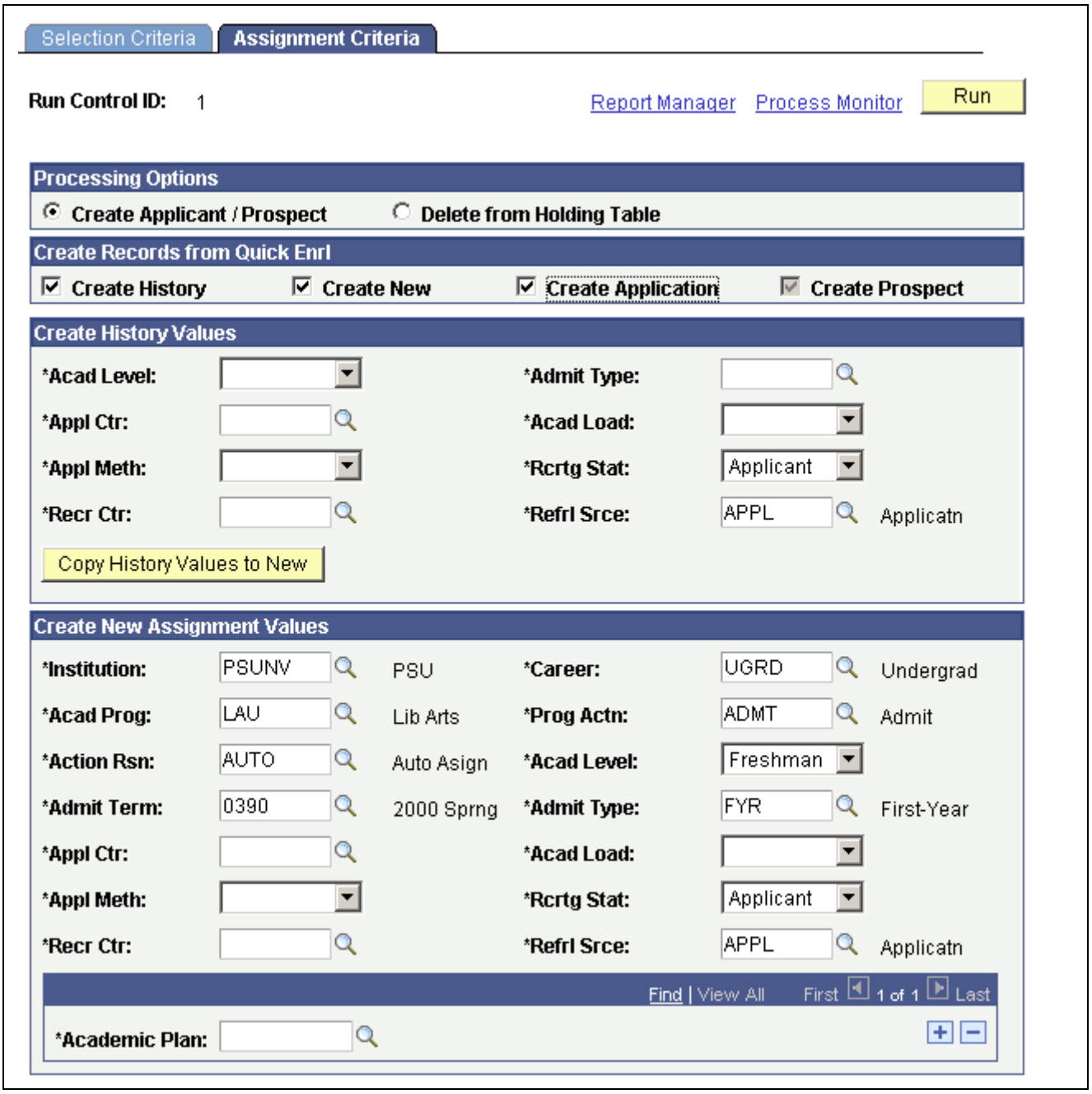
Academic Career Select the academic career from which you want to select quick-admitted students. You can enter multiple academic careers.

Academic Program Select the academic program from which you want to select quick-admitted students. You can enter multiple academic programs.

Academic Plan Select the academic plan from which you want to select quick-admitted students. You can enter multiple academic plans.

Assigning Criteria for Quick Admit

Access the Quick Admit - Assignment Criteria page.



Quick Admit - Assignment Criteria page

Create Applicant/Prospect Select this option to create prospect and application records for the selected group of students.

Delete From Holding Table Select this option to take the selected group of students and delete them from the temporary table. Selecting this option will disable the remaining fields on the page. If this is the desired option, click the Run button to initiate this process. If you use the Quick Admit a Student feature but do not create applications for quick admitted students, it is recommended that you run this process to clean out the temporary table.

Create History Select this check box to create history records for the group of students you have selected. The system adds the students to the prospect and applicant tables even though they bypassed the normal admissions process. The data created is based on the data entered on the Quick Admit pages. Selecting this check box ensures that admissions information is available for these people for your admissions reporting purposes.

Create New Select this check box to create a new set of prospect and application records for the selected group of students. "New" means that prospect and application records will be created based on the parameters in the Assignment Values group box.

Create Application Select this check box to create applications for the selected group of students. This field is available if you select the Create New check box.

Create Prospect Select this check box to create prospect records for the selected group of students specified on the Selection Criteria page. If the Create Application check box is selected, the availability of this field is determined by the settings on the Installation Defaults - AD page.

The following fields appear, regardless of whether you choose Create History or Create New:

Acad Level (academic level) Select the academic level that you want to assign to the selected group.

Admit Type Select the admit type that you want to assign to selected group.

Appl Ctr (application center) Select the application center that is populated for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.

Acad Load (academic load) Select the academic load that the applicants will carry. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Full-Time* and *Part-Time.*

Appl Meth (application method) Select how or in what form the application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Application Service, Diskette, Hard Copy, Web Application, EDI,* and *OUAC.*

Rcrtg Stat (recruiting status) Select the recruiting status that will be populated on the prospect record of this applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Applicant, Inactive, Inquiry, Prospect,* and *Suspect.*

This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes.*

Recr Ctr (recruiting center) Select the recruiting center that is responsible for this particular program on the prospect record. Define recruiting centers on the Recruiting Center Table page.

This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes.*

Refrl Srce (referral source) Select the appropriate referral source that will be populated on the prospect record. A referral source indicates how this person became a prospect. In other words, it is a high-level indicator of how your institution came into contact with the person. For example, a referral source could be *Drop-In, Campus Event,* or *College Fair.* Define referral sources on the Referral Source Table page.

This field appears only if the Create Prospects field on the Installation – AD page is set to *Yes*.

Copy History Values to New Click to transfer values entered for Create History to the corresponding fields in the Create New section. This minimizes data entry.

The following fields are associated solely with the Create New option:

Institution Select the academic institution that you want to assign to the selected group.

Career Select the academic career that you want to assign to the selected group.

Academic Plan Select the academic plan that you want to assign to the selected group of students.

Acad Prog (academic program) Select the academic program that you want to assign to the selected group.

Prog Actn (program action) Select the program action that you want to assign to the selected group.

Action Rsn (action reason) Select the action reason that you want to assign to the selected group.

Admit Term Select the admit term that you want to assign to the selected group.

Academic Plan Select the academic plan that you want to assign to the selected group of students.

Click the Run button to run this request at user-defined intervals.

Students who were processed are automatically deleted from the temporary record, so it is not necessary to run the Delete from Holding Table process.

Creating Applications from External Test Score Data

If application data is included in your LAW, AMCAS, or ADA external test score loads, you can load the data as new applications. The data used to create new applications comes from the Additional Candidate Information data posted to the following pages:

Test	Page Where Data Comes From
LAW	Personal Information
AMCAS	Application
ADA	Application

After the external application data is posted to your database, you are ready to run the Create Applicants from Tests process.

Note. Applications are created for all records posted to the Additional Candidate Application Information pages listed in the previous table if the Post option contains the *Select for Application Creation* value. After the Create Applicants from Tests process runs, the process updates the Post option to *Created Application* if the process created an application for the person, or *Duplicate Application* if a potential duplicate was found and the program did not create an application.

You must set up some initial parameters before activating the process.

To run the Create Applicants from Tests process:

1. Indicate from which external test score load the application will come.
2. Set up your application program parameters.
3. Set up your application data parameters.
4. Set up your application recruiting data parameters and run the Create Applicants from Tests process.

See Also

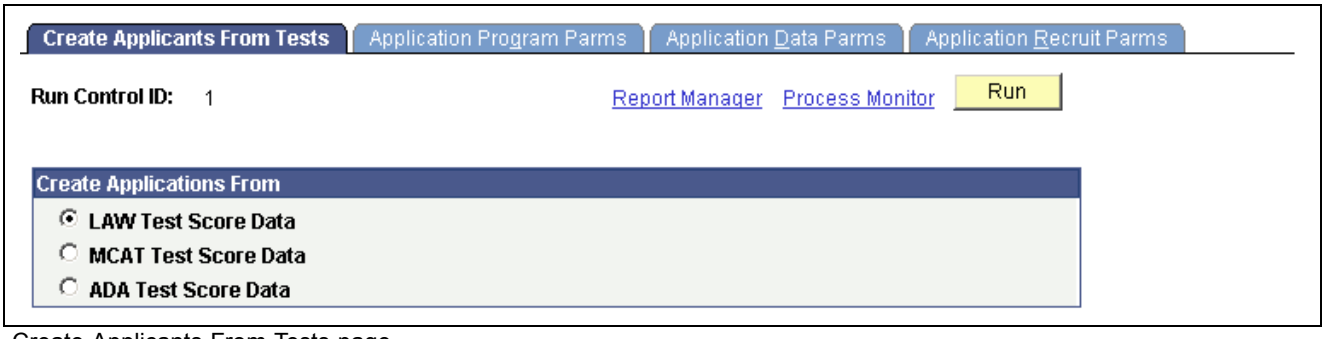
Chapter 17, “Processing External Test Scores,” page 275

Pages Used to Create Applications from External Test Score Data

Page Name	Object Name	Navigation	Usage
Application Processing Parms (application processing parameters)	ADM_APPL_PROC_PARM	Student Admissions, External Test Score Processing, Create Applicants from Tests	Indicate which type of application you want to load.
Application Program Parms (application program parameters)	ADM_PROG_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Program Parms	Set up default program parameters for the new applications. The values you select for the fields on this page are inserted on the Application Program Data page when the new applications are loaded.
Application Data Parms (application data parameters)	ADM_APPL_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Data Parms	Set up default application data parameters to be filed in on new applications. The values you select for the fields on this page are inserted on the Application Data page when the new applications are loaded.
Application Recruit Parms (application recruit parameters)	ADM_RECRUIT_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Recruit Parms	Set up default application recruiting parameters to be filled in on new applications. The values you select for the fields on this page are inserted on the Application School/Recruiting page when you load the new applications.

Selecting the Test Score Data Load

Access the Application Processing Parms (application processing parameters) page.

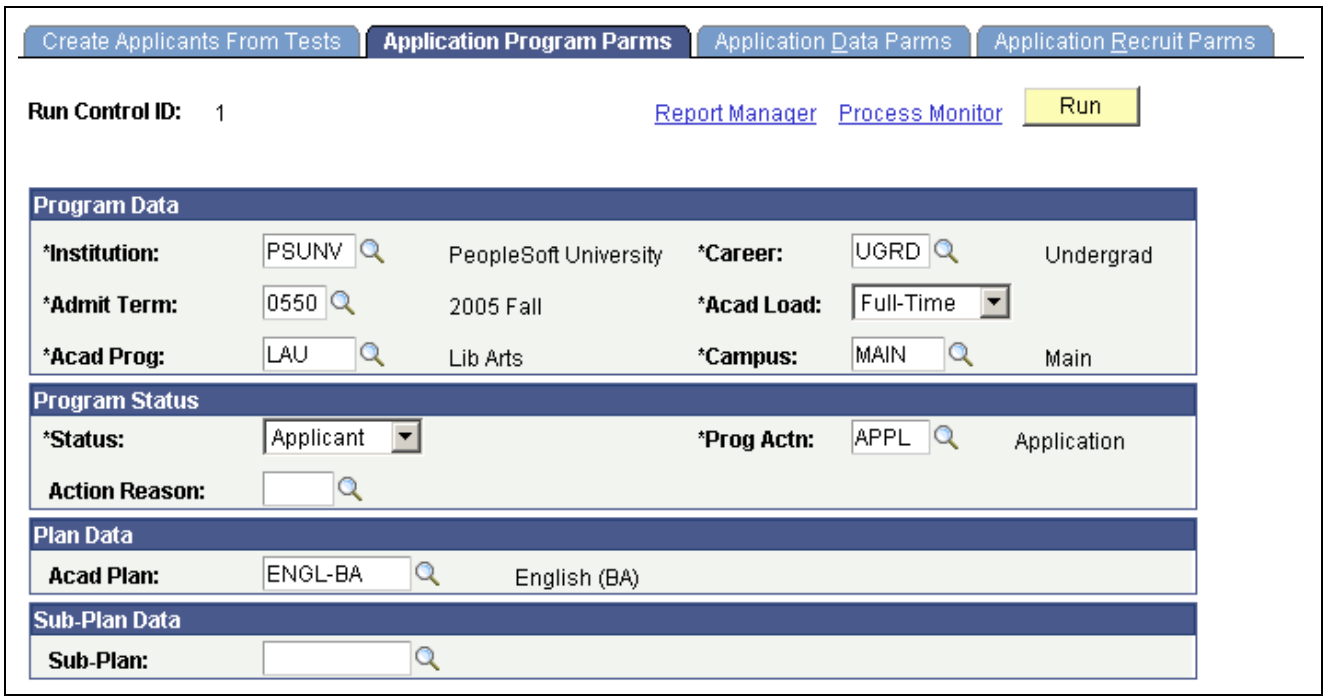


Create Applicants From Tests page

Select the type of external test data from which you want to create applications: *LAW Test Score Data, MCAT Test Score Data,*or*ADA Test Score Data.*

Setting Up the Application Program Parameters

Access the Application Program Parms (application program parameters) page.



Application Program Parms page

Note. Some of the fields on this page might populate automatically according to your user defaults. You can edit those fields as needed.

Admit Term Select the admit term for these applicants. Define admit terms on the Term Values Table page.

Acad Load (academic load) Select the academic load for these applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Program (academic program) Select the academic program for these applicants. Only the academic programs for the chosen career appear in the prompt list. Define academic programs on the Academic Program Table page.

Campus Select the campus being applied to within your institution. Define campuses on the Campus Table page.

Status Select the person's program status. This value is entered on the application. Values for this field are delivered with your system as translate values. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Prog Actn (program action) Select the program action that you want entered regarding the program on these applications. Because the intent of this process is to create applications, not all program actions are available when you prompt on this field. Program actions are stored on the Program Action Table page.

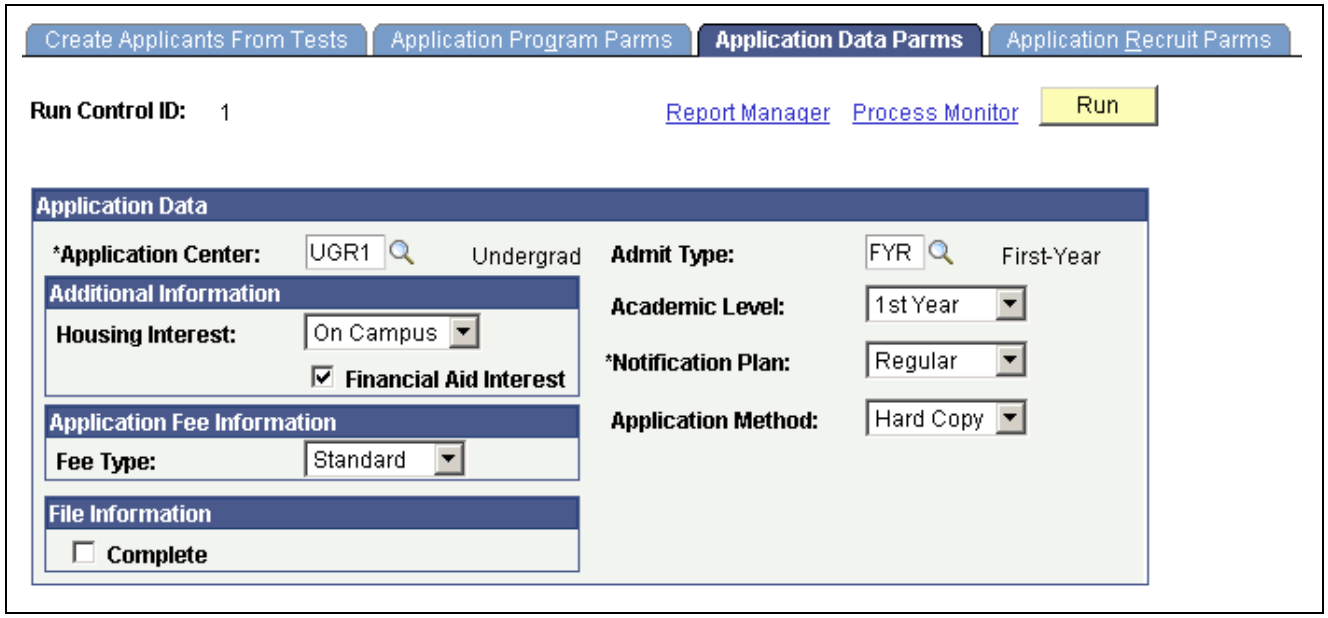
Action Reason If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Define action reasons on the Action Reason Table page.

Acad Plan (academic plan) Select an academic plan for these applications. Define academic plans on the Academic Plan Table page.

Sub-Plan Select a sub-plan for these applications. Define academic sub-plans on the Academic Sub-Plan Table page.

Setting Up the Application Data Parameters

Access the Application Data Parms (application data parameters) page.



Application Data Parms page

Note. Some of the fields on this page appear automatically according to your user defaults. Edit these fields as needed.

Application Center Select the application center for these applications. The only values available are those that fall under the academic career entered on the Application Program Parameters page.

Housing Interest Select a housing interest, if applicable. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Commuter, Off Campus,* and *On Campus.*

Financial Aid Interest Select this check box if you want the system to select the corresponding check box on the newly created applications. This field is useful for informational and reporting purposes. For example, your financial aid office can run reports listing those applicants interested in financial aid.

Fee Type Select the fee type you want entered for these applications. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Internatnl* (international) and *Standard.*

Complete Select this check box to mark these applications complete.

Admit Type Select the admit type that you want entered for these applications. Define admit types on the Admit Type Table page.

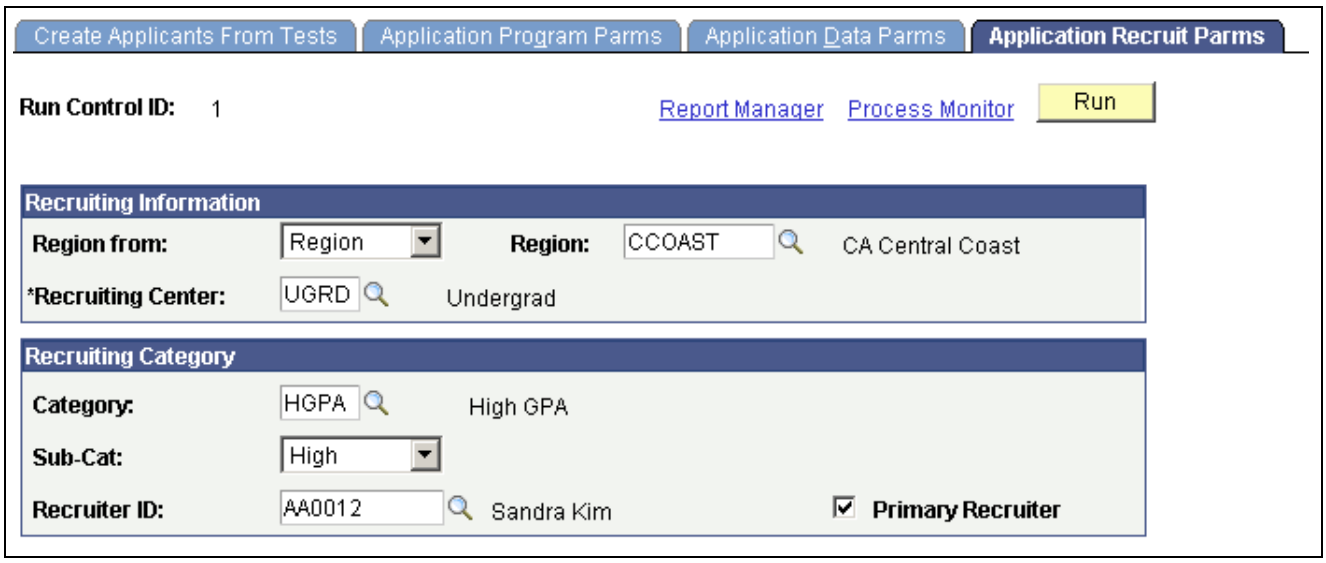
Academic Level Select the academic level you want entered for these applications. Values for this field are delivered with your system as translate values. You can modify these translate values.

Notification Plan Select the notification plan that you want entered for these applications. A notification plan specifies whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admt* (early admit), *Regular,* and *Rolling.*

Application Method Select the application method that you want entered for these applications. Application methods indicate how or in what form you received these applications. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Appl Serv* (application server), *Diskette, EDI* (electronic data interchange), *Hard Copy, OUAC* (Ontario Universities Application Centre), *Web Appl* (web application).

Setting Up the Application Recruiting Parameters

Access the Application Recruit Parms (application recruit parameters) page.



Application Recruit Parms page

Region from Select how you would like the region to be assigned to these applications. The delivered values are *School, Address,* and *Region.*

School: Not a valid choice. You will get an error message if you select this value.

Address: Select this value if you want the system to automatically assign a region to these applications according to the applicant's home address.

If you choose *Address,* the Region field is not available because the system will assign the region based on the person's home address or the address of the last school attended.

Region: Select this value if you prefer to choose a region here to be entered on all applications.

Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Region Select a region to be entered on these applications. This field is available only when you select *Region* in the Region from field. It is automatically assigned when Address is selected. Define regions on the Region Tree page.

Recruiting Center If you have indicated in your installation setup that you want prospect records to be created for applications that come in without existing matching prospect records, you must enter a recruiting center here to be added to the new prospect record. Define recruiting centers on the Recruiting Center Table page.

Category Select a recruiting category If you want a recruiting category entered on these applications. The recruiting categories available are based on the academic career that you selected.

Sub-Category Select a recruiting subcategory for these applications, if desired. Subcategories indicate your level of interest in the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *High, Low,* and *Medium.*

Recruiter ID If you have selected a recruiting category and you want a recruiter assigned to these applications under the chosen category, enter the desired recruiter identification number in this field. Only recruiters assigned to this academic career are available.

Primary Recruiter Select this check box if you want the recruiter that you selected to be the primary recruiter for these applications.

Click the Run button to run the Create Applicants from Tests process at user-defined intervals.

When this process runs, the system looks to the defaults you have set up on the Installation Defaults - AD page and creates a prospect record based on the Create Prospect setting.

Note. To view the applications posted for a person, use the Maintain Applications component, or for a summary of the applications, see the Application Summary page.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 21

Updating Applications

After you have entered and saved an application, you must use the Application Maintenance component to update the application. Use the Application Maintenance component to program, recruiting data and more. You can also use this component to calculate an application fee, calculate an enrollment deposit, and matriculate an applicant.

Data in this component is stored at the *application* level, as opposed to the applicant or program level. This data is relevant to all academic programs being applied to with this application. You can enter and edit information in this component.

This section lists prerequisites and discusses how to:

- Update or add application program data.
- Capture student response why the student selected another institution.
- Add a program to an existing application.

Prerequisites

Before you can edit or add any additional information in the Application Maintenance component, an application must first be entered into the system through the Application Entry component.

The Process Applications, Application Maintenance component is the third of three very similar components:

- Student Recruiting, Add/Update a Prospect component.
- Student Admissions, Add Application component.
- Student Admissions, Maintain Applications component.

For example, Add/Update a Prospect and Add Application have a Bio/Demo (biographic/demographic) page and a Regional page, All three components have pages with similar names such as Prospect Academic Program Data page and Application Program Data page. You use these components to enter or maintain similar information at different times in your business process: for prospects, for entering application data, and for maintaining application data (discussed in this chapter).

Pages Used to Update Applications

Page Name	Object Name	Navigation	Usage
Application Program Data	ADM_APPL_PROG_MNT	Student Admissions, Application Maintenance, Maintain Applications	Edit or update program and plan data for an application. You can also create an enrollment deposit and matriculate an applicant from this page. *All* applications must be tied to an academic career and program. Any lower level tracking depends on your office's policies.
Application Data	ADM_APPL_DATA	Student Admissions, Application Maintenance, Maintain Applications, Application Data	Update information for an application.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions, Application Maintenance, Maintain Applications, Application School/Recruiting	Update or add recruiting information data. See Chapter 14, "Adding and Updating Applications," Entering Recruiting Information for an Application, page 182.
Application Student Response	ADM_APPL_STDNT_RSP	Student Admissions, Application Maintenance, Maintain Applications, Application Student Response	Capture the reason why a prospect or applicant chose to attend another institution and what institution he or she will be attending.
Program Addition	ADM_APPL_ADD_PROG	Student Admissions, Application Maintenance, Program Addition	Add a program to an existing application if you have already created an application number for that person within the same career. This page is only for *adding* an academic program and program-related information. You perform all *modifications* to existing academic programs using the Application Program Data page in the Maintain Applications component.

Updating or Adding Application Program Data

Access the Application Program Data page.

Sequence The default of the sequence is 1. The sequence appears in the field to the right of the Effective Date field.

When you enter more than one row for the same effective date, the system automatically increments the sequence.

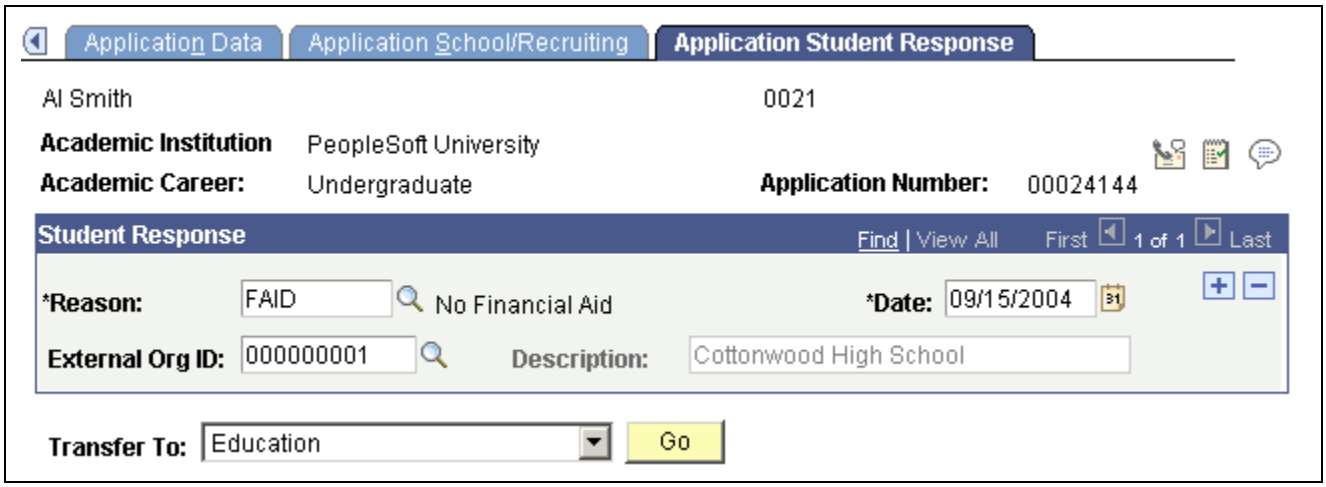
Program Action If you are adding a new row, the Program Action field is empty, because the system is assuming you are here to update the status of this application. Edit or add the appropriate program action value. Program actions are stored on the Admissions Action Table page and will display based on your Admissions Action security.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 175

Capturing Student Response – Why Student Selected Another Institution

Access the Application Student Response page.



Application Student Response page

Student response information is important information your institution might want to track and report on. You can choose from a series of adapted reason response codes that your institution can set up to capture the exact information you want to track. However, you can use this page however you want to. For example, you can capture why students chose *not* to attend your school and where they are going. Or instead, you can capture the reason why a student *did* select your school. If a student has multiple applications on file, each application can have its own corresponding student response. You can enter multiple reasons per application.

Reason Select a Student Response Reason code, for example *FAID* (financial aid). Define reason codes on the Response Reason Table page.

External Org ID (external organization ID) Select the external organization ID of the institution that the student has decided to attend. The system displays the external organizations for which you selected the Student Response - School Type check box.

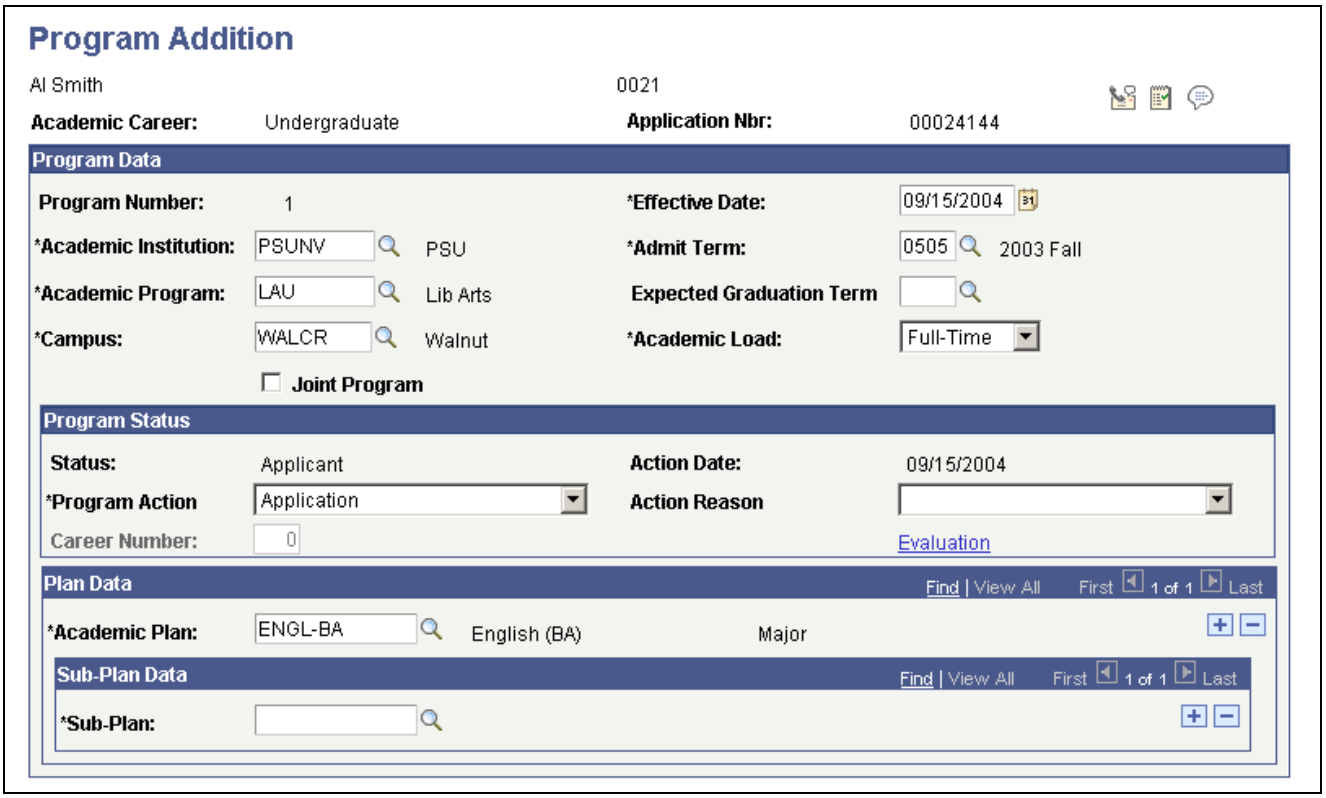
You can enter a free-form institution name by tabbing out of the External Org ID field without selecting a value and entering an institution in the field to the right. This way, the institution does not have to enter in all possible external institution codes. To enter a free form institution, you must select the Free Form Institution check box on the Installation - AD page.

Date The date the response reason was entered. The default date is your system date.

See Chapter 7, "Setting Up for Evaluating Applicants," Setting Up Student Response, page 80.

Adding a Program to an Existing Application

Access the Program Addition page.



Program Addition page

This component allows you to enter another program for an existing application. You may choose this option instead of creating a whole new application. The Program Number will increment by one based on the previous Program Number used for the application. For example, the student has one application on file with Program Number 0 for Liberal Arts and Program Number 1 for Fine Arts. Upon adding a new program from this component, the Program Number will increment to 2. After you have added the additional program, you maintain it through the Application Program Data page in the Maintain Applications component. You are prompted to choose the appropriate program number on the search page before accessing the Application Program Data page. To edit a different academic program for that application, you would need to click the Return to the Search button and choose the correct program number.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 175

Viewing Application Summary Information

This section discusses how to view application summary information.

Pages Used to View Application Summary Information

Page Name	Object Name	Navigation	Usage
Application Summary	ADM_APPL_SUMM	Student Admissions, Applicant Summaries, Application Summary	View summary information about any application stored for an applicant.
Application Detail	ADM_APPL_SEC	Click the Application Detail link on the Application Summary page.	View application detail information.

Calculating Application Fees in Batch

This section discusses how to calculate application fees in batch.

Pages Used to Calculate Application Fees in Batch

Page Name	Object Name	Navigation	Usage
Batch Application Fees	RUNCTL_SFPBAAPP	Student Admissions, Application Fees and Deposits, Application Fees Process	Calculate application fees for a group of applicants. The Batch Application Fees process updates each applicant's application fee status on the Application Data page to *Completed.* The process also updates each applicant's customer account in PeopleSoft Student Financials if appropriate.
Application Fees (Batch)	APP_FEE_CALC	Student Admissions, Application Fees and Deposits, Review Batch Application Fees	View application fee information generated by the Batch Application Fees process. You must first run the Batch Application Fees process via the Batch Application Fees page.
Application Fee Calc Messages	APP_CALC_MESSAGES	Student Admissions, Application Fees and Deposits, Application Fee Calc Messages	View messages generated by the batch application fees process.

Calculating Application Fees in Batch

Access the Batch Application Fees page.

Batch ID The Batch Application Fees process assigns a batch ID after you initiate the process.

Academic Institution, Application Center, and **Admit Term** — Enter an academic institution, application center, and admit term. The Batch Application Fees process calculates application fees for the applicants that the process selects using this criteria.

Display Application Fees — Click this link to view the application fees for each applicant after you have run the Batch Application Fees process. The Application Fees (Batch) page appears.

Click the Run button to run the Batch Application Fees process at user-defined intervals.

Recording the Basis of Admission

To set up a basis of admission, use the Basis of Admission component (BASIS_ADMIT_TABLE).

This section discusses how to:

- Define basis of admission codes.
- Assign basis of admission codes to applicants.

You can set up basis of admission codes that represent general admission criteria—such as ACT test score, grade point average, or interview—then link the code or codes to applicants or students. You can also print the basis of admission on admission offer letters and transcripts.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
BasisAdmit	ADM_BASIS_ADMIT.BASIS_ADMIT_CODE
BasisAdmitDL	ADM_BASIS_ADMIT.DESCR254
BasisAdmitDE	BASIS_ADMIT_TBL.DESCR
BasisAdmitDS	BASIS_ADMIT_TBL.DESCRSHORT
BasisAdmitAcadProg	ADM_BASIS_ADMIT.ACAD_PROG
BasisAdmitTerm	ADM_BASIS_ADMIT.ADMIT_TERM
BasisAdmitBeginDt	ADM_BASIS_ADMIT.BEGIN_DT
BasisAdmitEndDt	ADM_BASIS_ADMIT.END_DT

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications"

Pages Used to Record the Basis of Admission

Page Name	Object Name	Navigation	Usage
Basis of Admission Setup	BASIS_ADMIT_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Basis of Admission Table	Define basis of admission codes. You link these codes to applicants and students on the Basis of Admission page.
Basis of Admission	ADM_APPL_BASIS_ADM	Records and Registration, Career and Program Information, Basis of Admission	Assign the basis of admission to an applicant or student.

Defining the Basis of Admission Code

Access the Basis of Admission setup page.

Include In Offer Select this check box to include the code, description, short description, and long description by default on the admission offer letter for any applicant to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Offer check box on the Basis of Admission page.

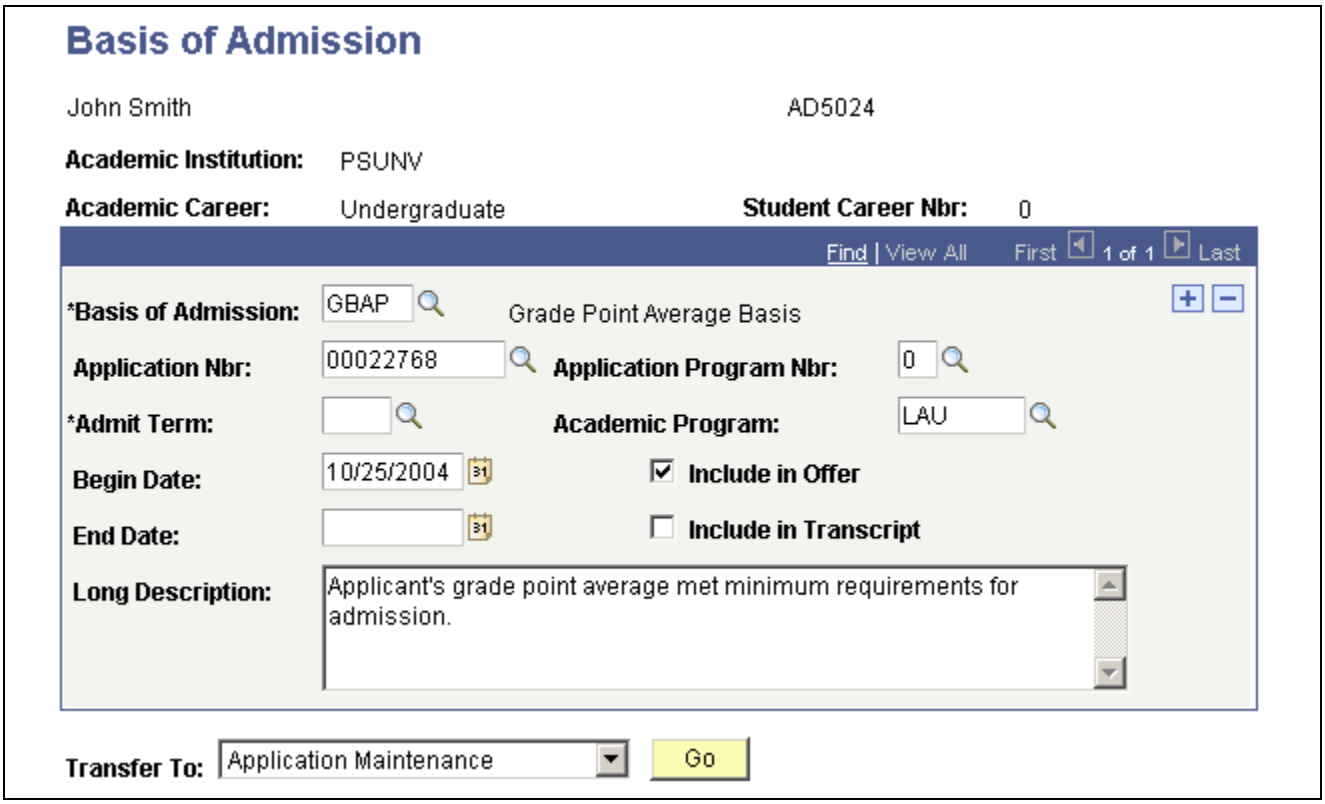
Include In Transcript Select this check box to include the code and long description by default on the transcript for any student to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Transcript check box on the Basis of Admission page.

Long Description Enter a default long description for this basis of admission code. The long description appears by default on the Basis of Admission page after you assign this code to the applicant or student.

The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum score required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on their SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.

Assigning a Basis of Admission to an Individual

Access the Basis of Admission page.



Basis of Admission page

Basis of Admission Select a basis of admission code from the list of valid values. Define basis of admission codes on the Basis of Admission page.

Application Nbr (application number) Select an application number to assign the basis of admission to a specific application. (optional)

Application Program Nbr (application program number) Select an application program number to assign the basis of admission to a specific program. (optional)

Admit Term Select the individual's admit term. If an individual was admitted to more than one academic program, he or she could have multiple admit terms.

Academic Program Select the individual's academic program to which you want to apply the basis of admission. Individuals can be admitted to multiple academic programs. (optional)

Begin Date The default for the begin date is your system date.

End Date Enter the date that you want this basis admission to be no longer valid. If you run the offer letter or transcript after this date it will not appear even if you have selected the Include in Offer check box.

Include in Offer Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this applicant here.

Include In Transcript Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this person here.

Long Description The long description appears from the Basis of Admission setup page. You can change the long description for this person here.

The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on his or her SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Recording Comments and Conditions for Admission

To set up admission comment codes, use the Admissions Comments component (ADMISSION_COMMENTS).

This section discusses how to:

- Define admissions comment codes.
- Assign admission comment codes to applicants.

PeopleSoft Recruiting and Admissions functionality enables you to record generic comments and then link them to an applicant. You can use this functionality however you like. One particular use is to record conditions of admission. For example, you can define a comment such as "You must successfully complete all current coursework." You can set up admission comment codes that represent general admission comments, then link the code or codes to the applicant. You can print the comments on the admission offer letter, and later, after the applicant becomes a student, you can print the comment on his or her transcript.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
AdmCommentCd	ADM_COMMENTS.ADM_COMMENT_CD
AdmCommentDL	ADM_COMMENTS.DESCRLONG
AdmCommentDE	COMMENT_CDE_TBL.DESCR

Winword Merge Field	PeopleSoft RECORD.FIELD
AdmCommentDS	COMMENT_CDE_TBL.DESCRSHORT
AdmCommentTerm	ADM_COMMENTS.ADMIT_TERM
AdmCommentProg	ADM_COMMENTS.ACAD_PROG
AdmCommentBegin	ADM_COMMENTS.BEGIN_DT
AdmCommentEnd	ADM_COMMENTS.END_DT
AdmCommentType	ADM_COMMENTS.COMMENT_TYPE

See Also

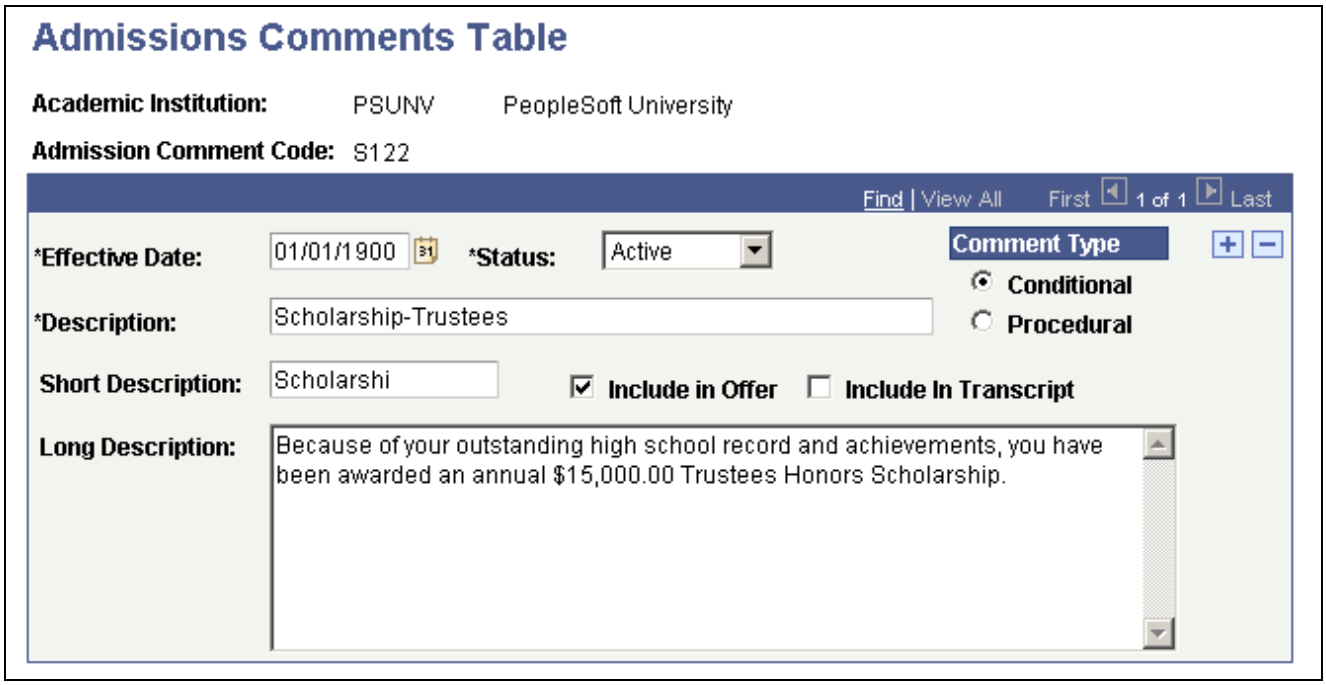
PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications," Understanding Letter Generation

Pages Used to Record Comments and Conditions for Admission

Page Name	Object Name	Navigation	Usage
Admissions Comments Table	ADM_COMMENTS_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Admissions Comments Table	Define admission comment codes.
Admissions Comments	STDNT_ADM_COMMENTS	Student Admissions, Application Evaluations, Application Decisions, Admission Comments	Assign admission comments to applicants.

Defining Admission Comment Codes

Access the Admissions Comments Table page.



Admissions Comments Table page

Comment Type Indicates the type of comment that you are entering. Select *Conditional* if the comment is a condition for admission, and *Procedural* if the comment is for procedure only. (informational only)

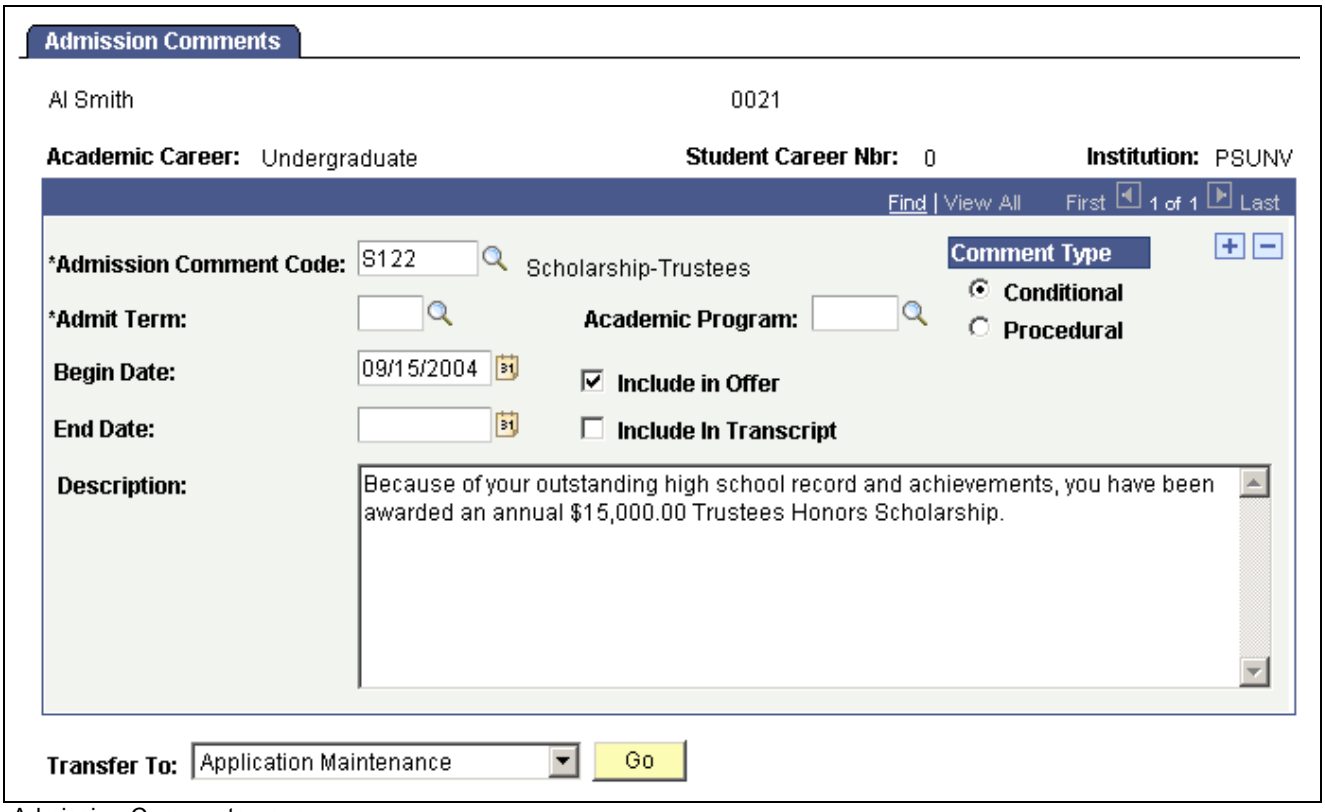
Include In Offer Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. When you select this check box, the system automatically selects the Include in Offer check box on the Admission Comments page.

Include In Transcript Select this check box to include the code and long description on the student's transcript. When you select this check box, the system automatically selects the Include in Transcript check box on the Admission Comments page.

Long Description Enter the full text of the comment for this admission comment code. The long description appears by default on the Admission Comment page after you assign this code to the applicant.

Assigning Admission Comments to Applicants

Access the Admission Comments page.



Admission Comments page

Admission Comment Code Select the code from the list of valid values. Admission Define comment codes on the Admission Comment Table page.

Admit Term Select an admit term. If an applicant was admitted to more than one academic program, he or she could have multiple admit terms.

Academic Program Select an academic program. Applicants can be admitted to multiple academic programs. (optional)

Comment Type Indicates the type of comment that you're entering. Select *Conditional* if the comment is a condition for admission, and *Procedural* if the comment is for procedure only. (informational only)

Begin Date The default for the begin date is your system date.

End Date Enter the date that you want this comment to be no longer valid. If you run the offer letter after this date it will not appear even if you have selected the Include in Offer check box.

Include in Offer Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Admission Comment Table page is selected. You can change the setting for this applicant here.

Include In Transcript Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Admission Comment Table page is selected. You can change the setting for this applicant here.

Long Description	The long description appears from the Admission Comment Table page. You can change the long description for this applicant here.
Go	Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Viewing Summary Checklist, Comment, and Communication Data

You can use summary pages for a quick view of checklists, comments and communications stored for prospects, applicants and recruiters. You can also view Operator 3C Groups pages for checklists, comments and communications.

- Use the Checklist Summary page (PERS_CHKLST_SUMM) to access a summary of checklists associated with a recruiter, a prospect, or an applicant.

  The Checklist Summary page enables you to designate which checklist information you want to see for a person.

- Use the Comment Summary page (CMNT_SUMMARY) to access a summary of comments associated with a recruiter, a prospect or an applicant.

  The Comment Summary page enables you to designate which checklist information you want to see for a person.

- Use the Communication Summary page (COMM_SUMMARY) to view a summary of communications associated with a recruiter, a prospect, or an applicant.

  This page enables you to designate which communication information you want to see for a person.

- Use the Operator 3C Groups Summary (Checklist) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Comment) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Communication) page (OPR_GRP_3C_SUM) to view the user 3C groups to which you are assigned.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, “Using the 3C Engine”

CHAPTER 15

Performing EDI TS130 Transcript Transactions

This chapter lists prerequisites, provides overviews, and discusses how to:

- Process the inbound EC agent.
- Load EDI data for transcript transactions.
- Review and edit the EDI TS130 staging pages.
- Run the Organization Search process.
- Set up TS130 search/match/post parameters, process, and post the EDI staging files.
- Purge the EDI TS130 staging table and messages.
- Purge all EDI messages.

Prerequisites

The EDI Manager provides the tools you need to manage electronic commerce transactions with your trading partners. To assist you in setting up the EDI Manager for recruiting and admissions application and transcript transactions, we have created some sample definitions in the EDI Manager. However, before processing EDI transactions, you might need to modify the setup to fit your particular needs. Therefore, it is important that you familiarize yourself with PeopleSoft EDI architecture and recruiting and admissions processes to understand the implications of your EDI implementation decisions. The following sections show you a demonstration of how this information *can* be set up.

When a trading partner submits an EDI transaction, it needs to address it to a specific business unit. In other words, the EDI agent needs to know in some way to which business unit to forward the transaction. Therefore, you must define entity codes that tell the EDI Manager where to forward the transaction. PeopleSoft has created sample entity codes for admissions transcript and application transactions, as well as sample internal and external partner definitions.

- The sample entity code provided for the Admissions Transcript Transaction (TS130) is ADTR - Admission Transcript Process.
- There are two sample entity codes provided for the Application for Admissions Transaction (TS189): ADAP - Admissions Applicant Processing, and ADST—Admissions Applicant Student.
- The sample internal partner definition provided (for both the EDI TS130 and TS189 transactions) is Admissions - Admissions Office.
- The sample external partner definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_STX - Admissions EDI Supply Tech. As mentioned earlier, you might use another external partner as your EDI translator.

When you receive an EDI transaction from a trading partner, the first record of the transaction includes a *Transaction ID* that identifies the transaction type. The EDI agent uses the transaction ID, in conjunction with the trading partner ID, to determine which inbound map to use to process the transaction data. Similarly, when you initiate an outbound transaction, the EDI agent puts the appropriate transaction ID in the first transaction record so that the recipient knows what kind of transaction you've sent. PeopleSoft has created sample transaction definitions, partner profile definitions and conversion data profiles.

- The sample transaction definition provided for your ADM_TRNS_130 Admissions Transcript Transaction is ADM_TRNS_TS130 Inbound - Admissions Transcript Transaction.
- The sample transaction definition provided for your ADM_TRNS_189 Admissions Applicant Transaction is ADM_TRNS_TS189 Inbound - Admissions Applicant Transaction.
- The sample partner profile definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_P - Admissions EDI Transaction Profile.
- The sample conversion data profile provided is EDI_CONV - EDI TS130/TS189. Conversion Profile lists the conversion values used in your EDI load processing (for both the EDI TS130 and TS189 transactions).

Electronic commerce maps specify how the EDI Agent transfers data between PeopleSoft business documents and the staging tables in the PeopleSoft database. The EDI agent uses inbound maps to transfer data from PeopleSoft business documents to the staging tables, in preparation for processing by your PeopleSoft Recruiting and Admissions application. PeopleSoft has created sample inbound map definitions.

- The sample inbound map definition provided for the Admissions Transcript Transaction (ADM_TRNS_TS13O) is EC Map ID TS130_MAP.
- The sample inbound map definition provided for the Admissions Applicant Transaction (ADM_TRNS_TS189) is EC Map ID TS189_MAP.

When you add a trading partner, you assign to it a *map profile*, which lists the electronic commerce maps that the EDI agent can use to process transactions from the partner. PeopleSoft has created sample data mapping profile definitions.

The example data mapping profile definition provided is ADM_EDIMP - Admissions EDI Map Profiles. This definition lists the map assignments for the Admissions Transcript Transaction (ADM_TRNS_TS13O) and the Admissions Applicant Transaction (ADM_TRANS_TS189).

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager," Setting Up Trading Partners

PeopleSoft Supported Integration Technologies: "EDI Manager," Defining EDI Transactions

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Electronic Commerce Maps

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Map Profiles

Understanding EDI TS130 Transcript Transactions

PeopleSoft Recruiting and Admissions enables you to load external academic transcripts through EDI (Electronic Data Interchange).

To perform EDI TS130 transcript transactions:

1. Process the inbound EC agent.

   Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

2. Load the EDI data for transcript transactions.

   Run the TS130 Load process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

   Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Process Options page.

4. After you have corrected all of the load errors in the suspense files, run the organization search process.

   This process looks for a match of the organization based on the ATP, ACT, FICE or IPEDS code loaded against the same codes stored on the Organization Table, School Data page. The system compares the EDI School Subject and EDI Course Number on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page.

5. Resolve and edit any course errors resulting from the organization search process.

   In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the course or organization errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Process Options page. If for some reason, more than one match is found for an organization, the EDI Org Process Options Search field will be set to Error and the Search/Match results will show the number of schools that matched on the code used as shown. You will need to resolve that error and run the Organization Search process again in order to get the courses populated.

   This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include name, social security number, birth date, and so forth) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are truly duplicative.

6. After you have corrected all of the organization and course errors in the suspense files, run the search/match/post process.

   This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include name, social security number, birth date, and so forth) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are truly duplicative.

7. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

   In the search dialog page of the TS130 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you are in the component, find the parameters for which the process identified a match, then use search/match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

8. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

Purge TS130 staging table records on the TS130 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your TS130 processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 250

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 122

Chapter 14, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 174

Understanding the EDI Applications and Transcripts Business Process

EDI is a means of transmitting data electronically from one entity to another. Through the EDI Manager you can receive data files from external sources and load important recruiting and admissions data into staging tables where you can review and edit the data. Then you can post the data to tables in your database.

PeopleSoft Recruiting and Admissions supports EDI transactions for transcripts and applications. For example, an applicant can fill out an application online using a third-party vendor, which then sends the application electronically to your institution. Additionally, an external institution can electronically send you an applicant's transcripts. In either case, you can load the data from a file into staging tables, review the data, and post it to your database.

The EDI transaction supported for the *transcript* load is the Admissions Transcript Transaction (ADM_TRNS_TS13O). The data transmitted through the EDI data load includes personal information, academic status, dates of attendance, session and course information, grades earned, degrees awarded, testing information, and more.

The inbound transaction supported for the *application* load is the Admissions Applicant Transaction (ADM_TRNS_TS189). The data transmitted through the EDI data load includes personal information, names, addresses, residence data, application entry and questions, session and course information, degrees awarded, testing information, and more.

If you receive a transcript or application for a person who does not exist in your database, the system can add the person to your system (depending on the parameters you set up). If the person already exists in your database, the system can update the person's records (depending on the parameters you set up).

The file that you load into EDI Manager is a business document that you receive from an EDI translator. The example setup provided with your system was developed using a Supply Tech business document. Your institution, however, might receive your business document from another EDI translator.

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager"

Processing the Schedule Inbound EC Agent

Use the Schedule Inbound EC Agent (inbound electronic commerce agent) page to specify the location of the file that you want to load into the suspense file. The Schedule Inbound EC Agent (ECIN0001.sqr) process converts the data in the file according to your setup in the EDI Manager. After the process converts the data, it loads it into temporary files until you run the load process.

To process the inbound EC agent for recruiting and admissions transactions:

- Select PeopleTools, EDI Manager, Monitor EDI Processing, Schedule Inbound EC Agent.
- Select the Single File run option.
- In the Single File Path field, enter the directory path of the file that you want to load.
- In the Single File Name field, enter the name of the file that you want to load.
- Select Do Not Force in the Force Profile group box.
- Clear the check boxes in the File Options group box.

See Also

PeopleSoft Supported Integration Technologies, "EDI Manager"

Loading EDI Data for Transcript Transactions

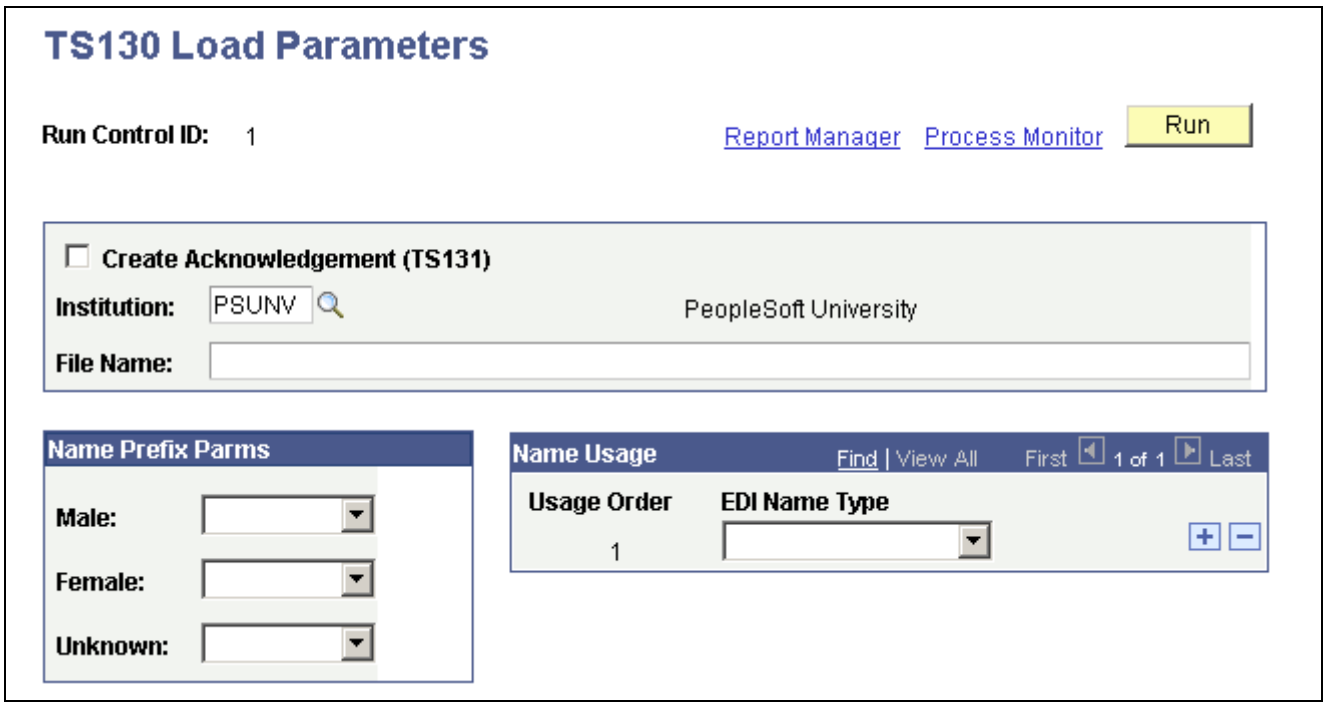
This section discusses how to use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables. You can also elect to create a TS131 acknowledgement file with this process. You send acknowledgement files to the institution that sent you the transcript. It acknowledges the receipt of the transcript and confirms that the institution the transcript was sent to was the institution that received it, and that the information sent is correct. Since you send the acknowledgement file to the institution that sent the transcript, it also confirms for you that the transcript came from the proper office at the institution indicated as the sender and that certain key elements of the transcript were received as they were sent. Before you can create EDI TS131 acknowledgement files, you must define defaults for the acknowledgement files on the TS130/TS131 Setup page. See Also Managing the TS130 Outbound Process.

Page Used to Load EDI Data for Transcript Transactions

Page Name	Object Name	Navigation	Usage
EDI TS130 Load Parameters	ADM_TS130_LOD_PARM	Student Admissions, Application/Transcript Loads, TS130, Load Process	Use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables.

Loading TS130 Transcripts into Staging Tables

Access the EDI TS130 Load Parameters page.



TS130 Load Parameters page

Warning! We recommend that you complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Create Acknowledgement (TS131) Select to create a TS131 acknowledgement file. The system creates the file according to the standards defined on the TS130/131 Setup page. After the system creates the file you can send it to the original sending institution to acknowledge receipt of the transcripts.

Institution Enter your institution code. The system uses the institution code to determine which setup values to use from the TS130/131 Setup page when creating the file.

File Name Enter the path to where you want the system to write the file, and enter the name of the created file.

Male, Female, and **Unknown** An EDI load does not include a person's prefix. It does, however, include gender. In these fields, enter the prefix that you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

After you load the data into staging files, you can view the data in the EDI TS130 Staging pages if desired.

EDI Name Type Enter the path to where you want the system to write the file, and enter the name of the created file. Since a transaction can have multiple names for a student, you must indicate which name type to use for the Primary PeopleSoft name. This is the name posted to the NAMES table. Indicate,

in hierarchical order, the EDI name types you want to use for this purpose. These are delivered translate values, based on the name types defined in the TS130 Standards documentation. I tis important that you enter all EDI name types you may receive. If a name type is not entered and the student only has that name type, the student will be loaded with a blank name and the record will display an error.

Click the Run button to run the EDI TS130 Transcript Load/Edit process at user-defined intervals.

Reviewing and Editing the EDI TS130 Staging Pages

This section discusses how to use the EDI TS130 Staging component to review or edit the transcript data that you loaded through the EDI transaction. If you have not run the posting process, any changes you make post to your database when you run the posting process, which means the data posts to the person's record (unless otherwise noted).

The EDI TS130 transcript staging pages are holding tables and are not linked to your database. Personal, organization, and transcript data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data, to the Education component, and to the Test Results page. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

You can access the EDI TS130 Staging pages to review the information stored here at any time during the Processing TS130 transcript business process. For example, you might prefer to look at the data immediately after loading it, after running the organization search process, after posting it, or after each of those steps, depending on your procedures.

Note. Be cautious when editing the data in your staging files prior to posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the applicable page in your application to make any changes.

See Also

The Postsecondary Electronic Standards Council Website

Pages Used to Review and Edit the EDI TS130 Data

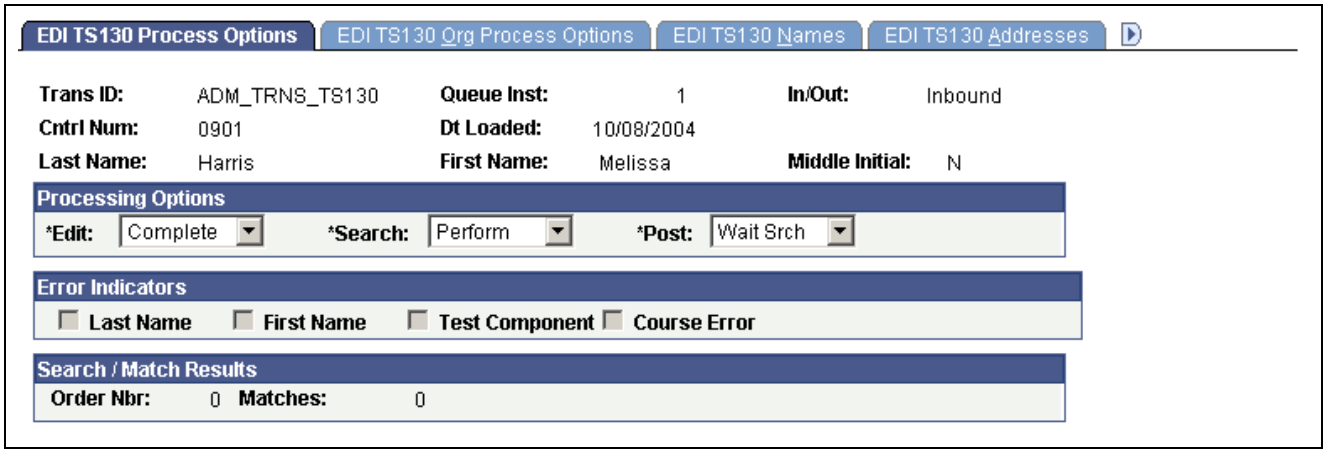
Page Name	Object Name	Navigation	Usage
EDI TS130 Process Options	ADM_TS130_PROC_OPT	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging	Review or edit the process options in your EDI TS130 staging table. This page provides the status of an EDI TS130 transcript record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.
EDI TS130 Org Process Options (organization process options)	ADM_TS130_ORG_OPT	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Process Options	Review or edit the process options for external organization records in your EDI TS130 staging table.
EDI TS130 Names	ADM_TS130_NAMES	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Names	Review or edit the names of applicants loaded through the EDI TS130 data load.
EDI TS130 Addresses	ADM_TS130_ADDR	Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Addresses	Review or edit the addresses of applicants loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo (biographical/demographic)	ADM_TS130_BIODEMO1	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo 2 (biographical/demographic 2)	ADM_TS130_BIODEMO2	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo (2)	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
EDI TS130 RAP (requirements, attributes, and proficiencies)	ADM_TS130_RAP	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 RAP	Review or edit transcript degree data loaded through the EDI TS130 data load. Requirement, Attribute, and Proficiency information fall under a session.

Page Name	Object Name	Navigation	Usage
EDI TS130 Previous Colleges	ADM_TS130_PCL	Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Previous Colleges	Review or edit previous college data loaded through the EDI TS130 data load.
EDI TS130 Org Data (organization data)	ADM_TS130_ORG_DEMO	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Data	Review and edit the organization demographic data loaded through the EDI TS130 data load. This page contains data about the external organization that this transcript data is regarding. Organization data does *not* post to your database.
EDI TS130 Acad Status (academic status)	ADM_TS130_SST	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Acad Status	Review or edit high school academic status data loaded through the EDI TS130 data load. If the organization you are viewing is a high school, this page contains high school academic information about the person in regard to this organization.
EDI TS130 Activities	ADM_TS130_ACTIVITY	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Activities	Review or edit transcript degree data loaded through the EDI TS130 data load. Activity information falls under a session.
EDI TS130 Test Scores	ADM_TS130_TESTS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Test Scores	Review or edit test score data loaded through the EDI TS130 data load.
EDI TS130 Sessions	ADM_TS130_SES	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Sessions	Review or edit transcript session data loaded through the EDI TS130 data load. Multiple sessions can come from one organization. For example, one session could make up the Fall of 9th grade, whereas another session could make up the Spring of 9th grade.
EDI TS130 Academic Summary	ADM_TS130_ACAD_SUM	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Academic Summary	Review or edit academic summary data loaded through the EDI TS130 data load.

Page Name	Object Name	Navigation	Usage
EDI TS130 Courses	ADM_TS130_CRS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Courses	Review or edit transcript course data loaded through the EDI TS130 data load.
TS130 Course Detail	ADM_TS130_CRS_SEC	Click the Course Detail link on the EDI TS130 Courses page.	View additional course information.
EDI TS130 Degrees	ADM_TS130_DEG	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Degrees	Review or edit transcript degree data loaded through the EDI TS130 data load. Degree information falls under a session.
EDI TS130 Additional Info	ADM_TS130_ADDL	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Additional Info	Review or edit additional information loaded through the EDI TS130 data load.
EDI TS130 Messages	ADM_TS130_MSGS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Messages	View EDI TS130 processing messages.

Reviewing EDI TS130 Staging Process Options

Access the EDI TS130 Process Options page.



EDI TS130 Process Options page

Processing Options

Edit The system displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the transcript data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the transcript data. The system indicates the values that you need to correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. It is for informational purposes only.

Search

The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the transcript data without a problem. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the Bio/Demo page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Error: The search/match process encountered problems when posting the transcript data.

Perform: The search/match process processes this record the next time you run the process.

Post

The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the table below.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/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 to your database when you run the search/match/post process. When set manually it means that the process identified a match and you determined manually that no duplication exists. When you run the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

Post Value	Meaning	How Set
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually it means that the process identified a match and you determined manually that a duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Error Indicators

Last Name, First Name, Test Component, and Course Error When a load error occurs, the load external data process selects the required values that were missing or incorrect in the load. Go to the Bio/Demo page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box. After you clear all of the check boxes and save the component, the system enters *Complete* in the Edit field.

Search/Match Results

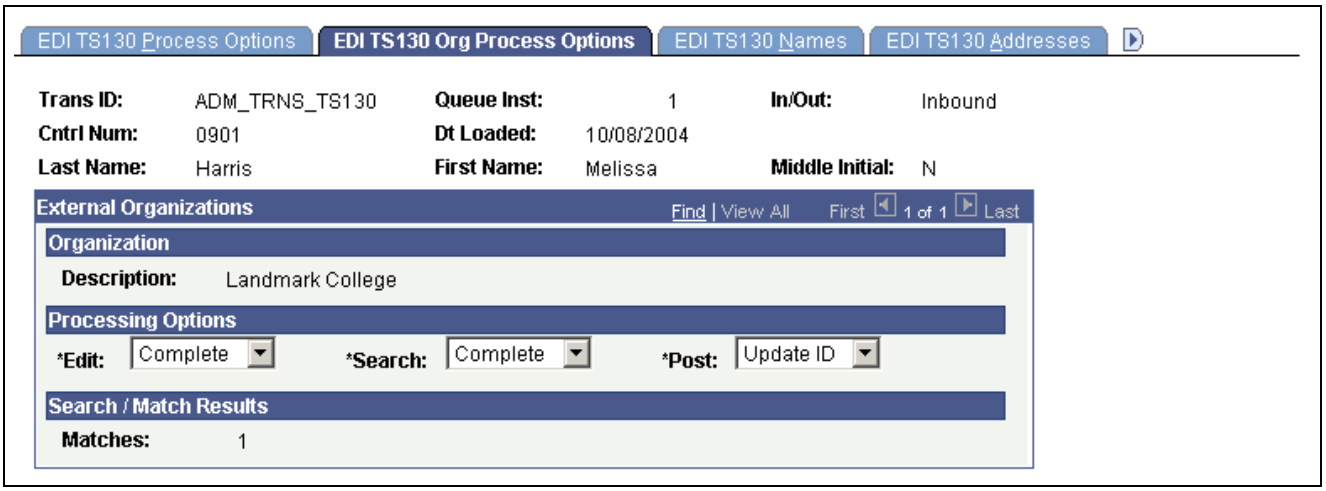
Order Nbr You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide for yourself whether or not a possible duplication exists.

Matches The system displays the number of matches the process found at the given order number.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Organization Staging Process Options

Access the EDI TS130 Org Process Options page.



EDI TS130 Org Process Options page

This page provides the status of EDI TS130 transcript organization data regarding the loading, search/match and posting processes. You can determine if an external organization record is waiting to be processed, if the person linked to this organization record instigated a new ID to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.

When organization data comes in with an EDI load, the system does not create new organizations in your database. Rather, During the Organization Search process, the system searches through your database to find a *matching* external organization for the organization data that comes in. Therefore, the organization must already exist in your database for this transcript data to process. An error occurs if the process does not find a matching organization.

Organization data is linked to a personal EDI TS130 record. The organization controls the transcript information related to the person linked to this record. The system does not process the organization data until you process the matching personal record.

Processing Options

Edit The system displays the status of the load process for this organization suspense record. The load process populates this value.

Complete: The load process loaded the organization data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the organization data. View details about the error on the EDI TS130 Messages page. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. This is for informational purposes only.

Search The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the organization data without a problem.

Error: The search/match process encountered problems when posting the organization data.

Perform: The search/match process processes this record the next time you run the process.

Post The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the table below.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	The system was unable to find a match for this organization in your database. To post data for this person regarding this organization, you must manually enter a valid organization ID on the EDI TS130 Org Demo page.	Set by the system during the search/match process if no matching organization was found in your database.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The system found a matching organization ID in the database. Consequently, data from this organization for this person can be updated.	Set by the system during the search/match process if a matching organization was found in the database.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

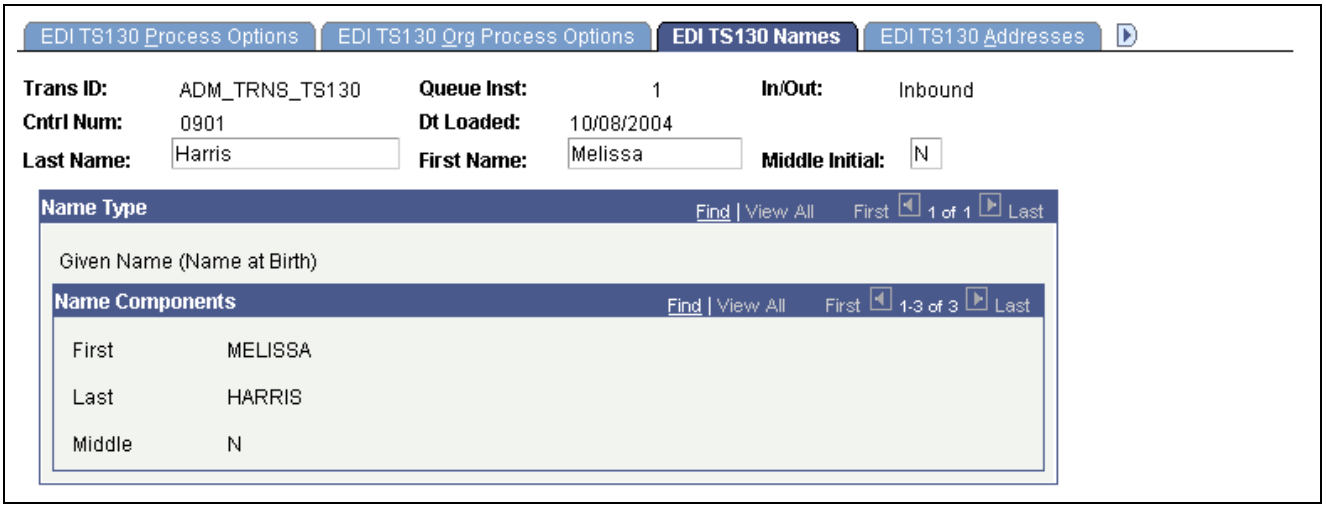
Search/Match Results

Matches The system displays number of external organization matches found in your database for this record.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Name Data

Access the EDI TS130 Names page.

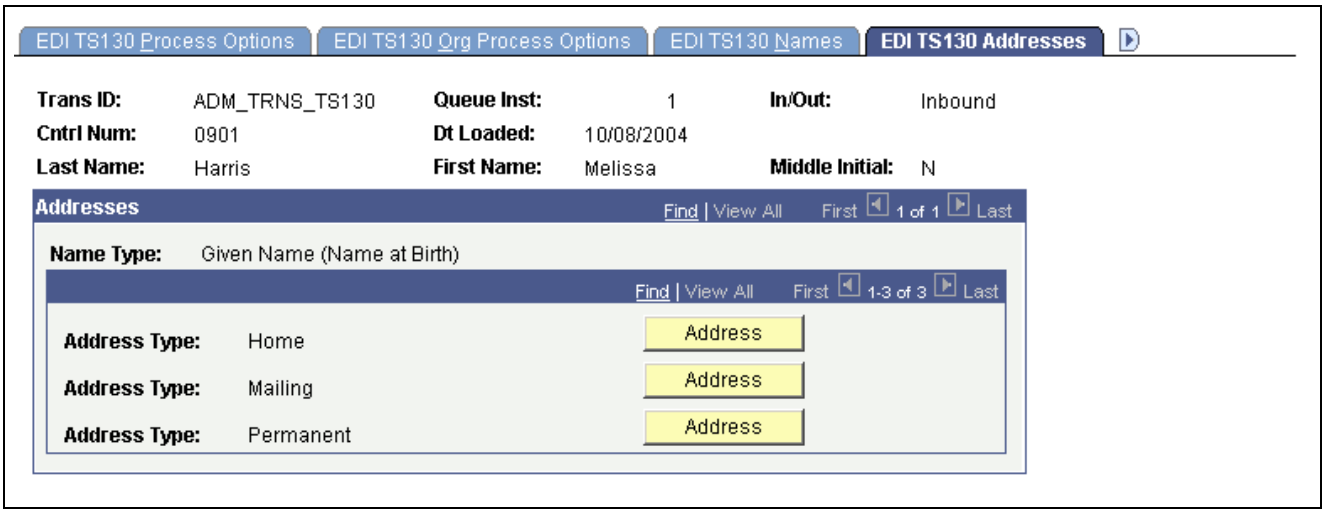


EDI TS130 Names page

View all the names parts loaded for the student by name type. The name appearing at the top of the page is the name that will be posted to the NAMES record. This name was determined by the Name types you indicated on the TS130 Load Parameters page.

Reviewing EDI TS130 Address Data

Access the EDI TS130 Addresses page.

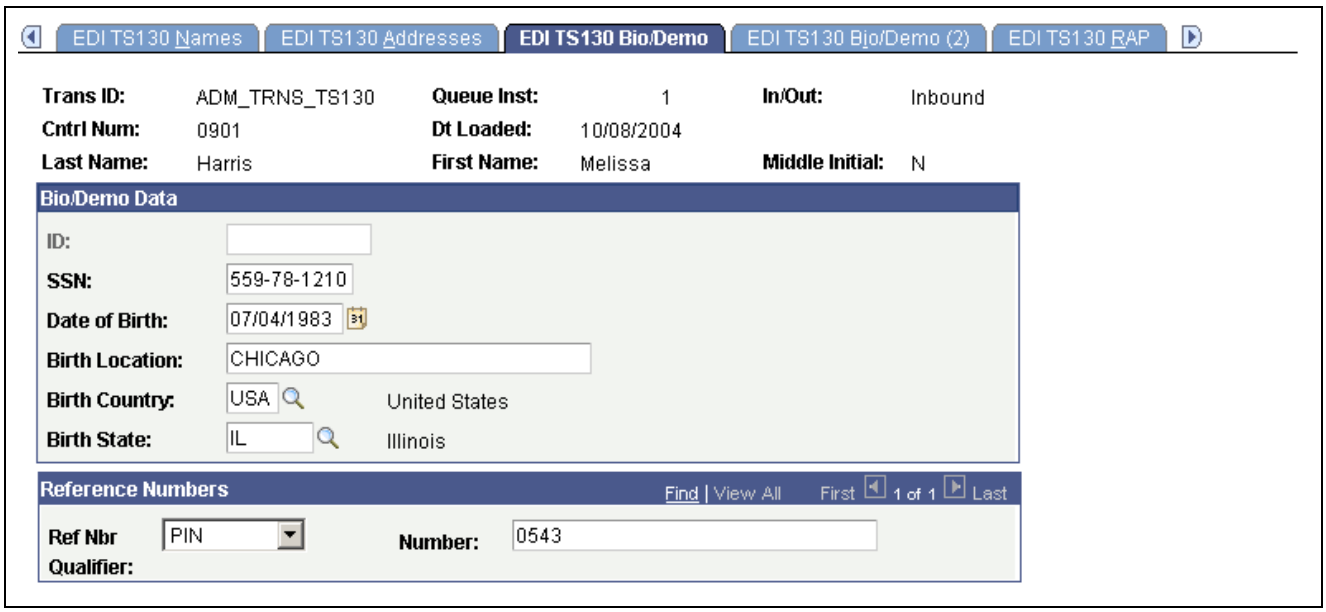


EDI TS130 Addresses page

View the address types loaded for the student. Click the Address button to access the TS130 Address where you can view the address loaded through the TS130 Load process. You can also click the Edit Address link on the TS130 Address page to edit address data. If a new record is created when you post EDI TS130 data, address information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record.

Reviewing EDI TS130 Staging Bio/Demo Data

Access the EDI TS130 Bio/Demo page.



EDI TS130 Bio/Demo page

The EDI TS130 Bio/Demo page contains biographical and demographic data for the person from the EDI TS130 transcript load.

If the system creates a new record when you post EDI TS130 data, the system uses personal information from this page to populate the new record. If the system finds a matching record in your database this EDI TS130 personal data does *not* overwrite any bio/demo data in the existing record, even if you have specified that matching records should be updated with EDI TS130 data. To protect verified information, the system never updates bio/demo data through external data loads.

If you have not run the posting process, and you edit the data on this page, the edited data posts to the person's record when you post the data.

ID

After the load process runs, this field is display-only and is empty. After the search/match process runs this field is accessible and contains the ID of the person in your database if a match was found, or *NEW* if a new record will be added during the posting process. After the posting process runs, this field is display-only and displays the ID of the person in your database to whom this EDI data posted.

This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here if the process created a new record.

If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.

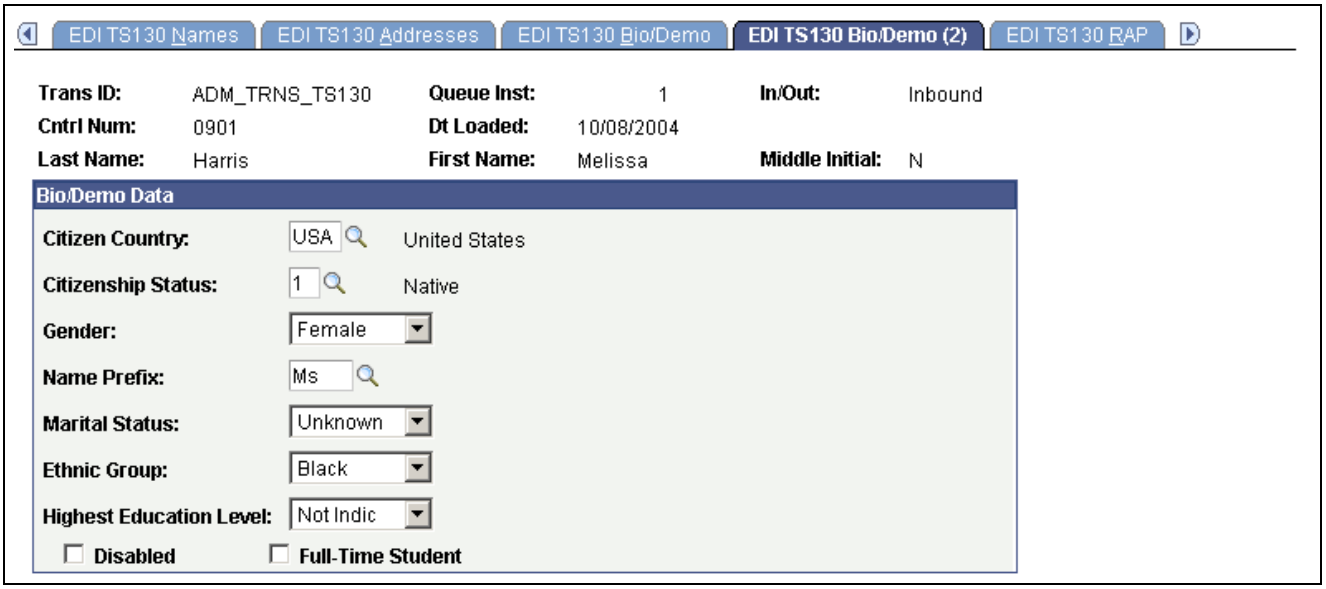
If the process finds a match and dumps the record into the suspense table, and you decide to update an existing ID (by selecting Update ID in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.

Ref Nbr Qualifier (reference number qualifier) The type of reference number indicated in the EDI TS130 load for this person.

Number (reference number) The actual reference number from the EDI TS130 load.

Reviewing EDI TS130 Staging Bio/Demo (2) Data

Access the EDI TS130 Bio/Demo (2) page.



EDI TS130 Bio/Demo (2) page

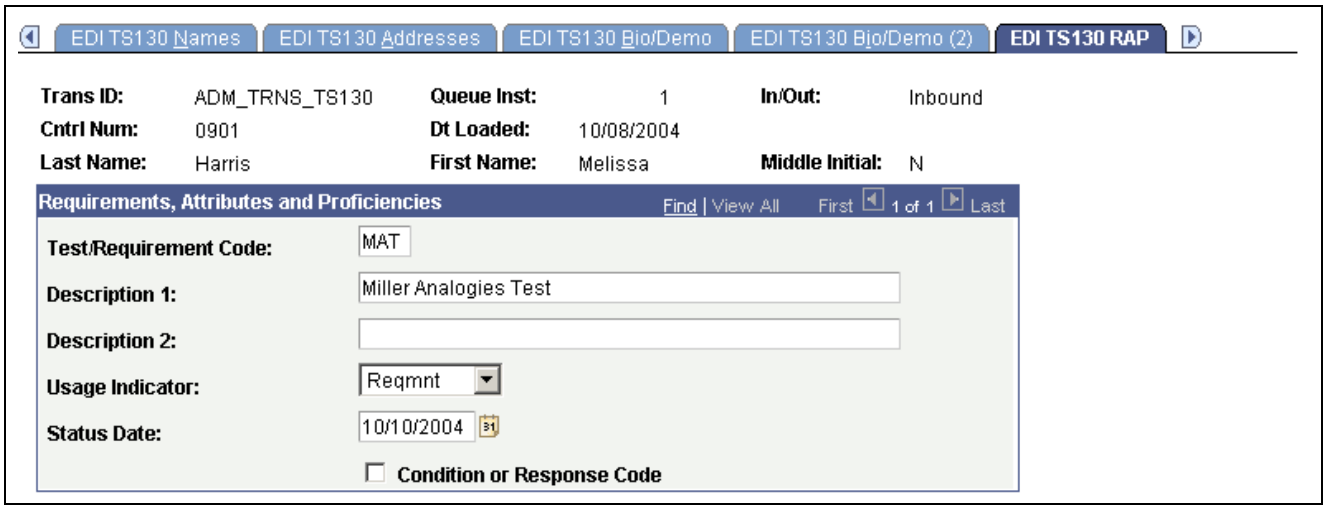
If a new record is created when you post EDI TS130 data, personal information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record. If you have not run the posting process, and you edit the data on this page, the edited data posts to the person's record when you post the data.

Disabled The system selects this check box if the record indicates that the person is disabled.

Full-Time Student The system selects this check box if the record indicates that the person is a full-time student.

Reviewing EDI TS130 Requirements, Attributes, and Proficiencies

Access the EDI TS130 RAP page.



EDI TS130 RAP page

Test/Requirement Code Indicates a particular national, regional, state, or local requirement for a course.

Description 1 Specifies the *main* category of the requirement, attribute, or proficiency.

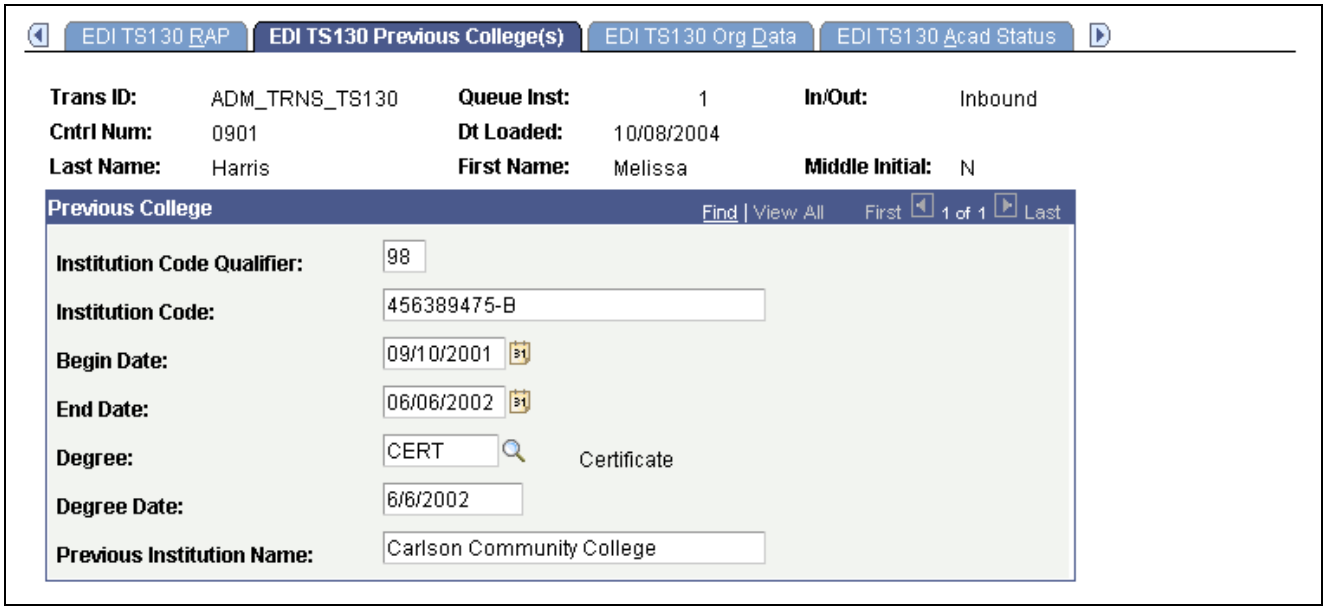
Description 2 Specifies the *lesser* category of the requirement, attribute, or proficiency.

Usage Indicator Designates the achievement or characteristic being described as a requirement, an attribute, or a proficiency. Possible values are *Attribute, Prfncy* (proficiency), and *Reqmn* (requirement).

Condition or Response Code If selected, indicates that the student or course meets the requirement, attribute, or proficiency.

Reviewing EDI TS130 Previous College Data

Access the EDI TS130 Previous College(s) page.

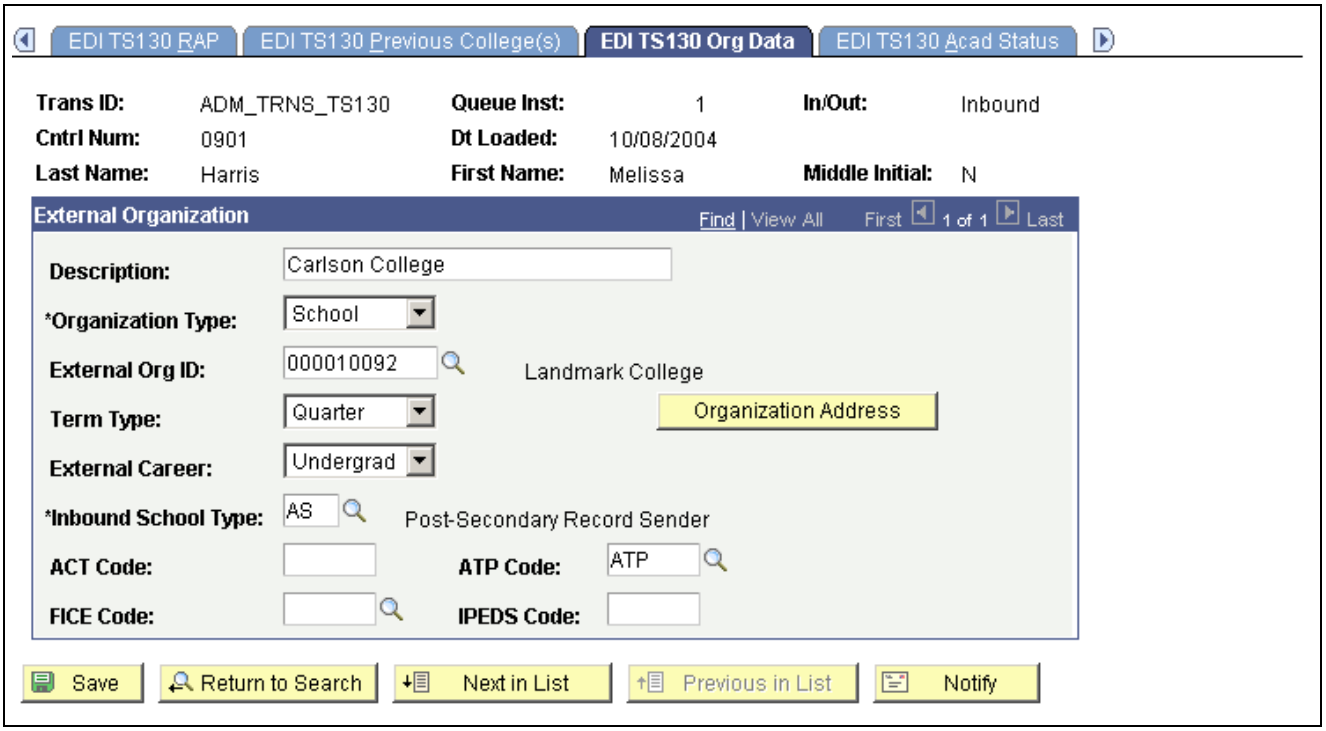


EDI TS130 Previous College(s) page

View previous colleges supplied by the sending institution on this page. Information includes the institution name, begin and end date as well as degree data. This data is information only and not posted to the Education component.

Reviewing EDI TS130 Staging Organization Demographic Data

Access the EDI TS130 Org Data page.



EDI TS130 Org Data page

Note. An organization must exist in your database in order for transcript data from that organization to post to your database. If the organization search process resulted in multiple or no matches, you'll need to manually choose an organization ID on this page. If the organization does not exist in your database, you'll need to add a new organization to your database and return to this page and insert the new ID. The organization search process must be run again to process the courses for the new external organization once it is entered on this page.

Description The descriptive name of this external organization as provided in the EDI load.

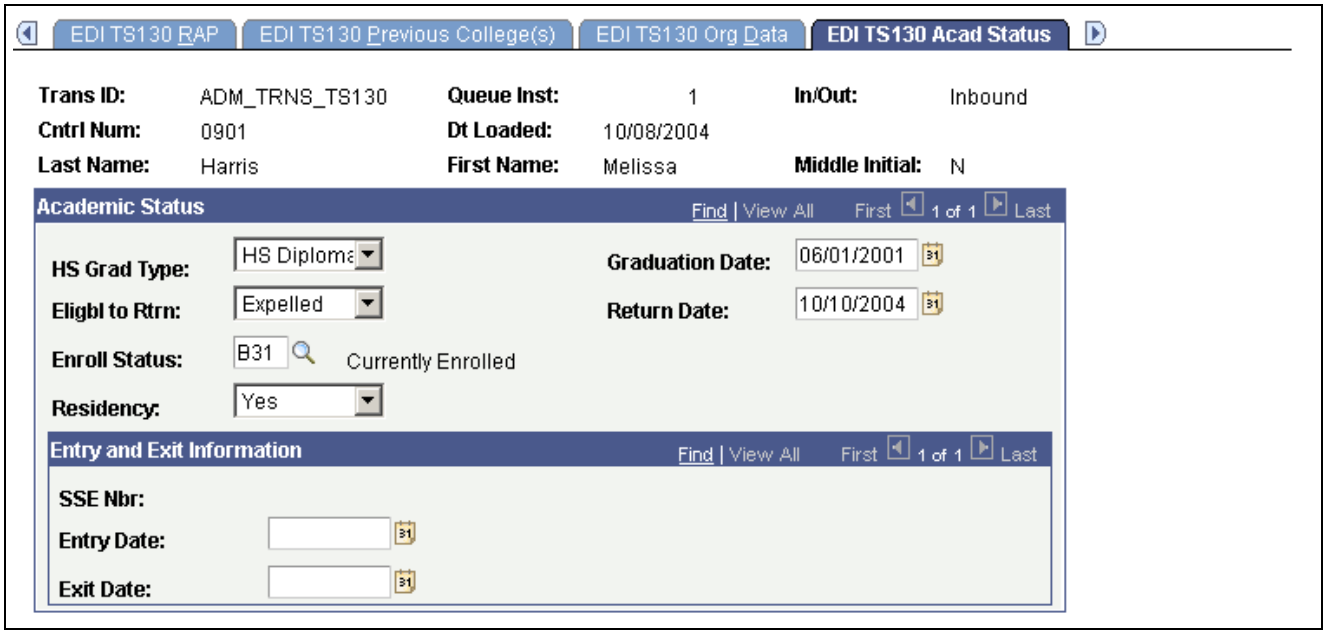
Organization Type The type of external organization (such as *School).* Values for this field are delivered with your system as translate values. You can modify these translate values.

External Org ID (external organization ID) If the organization search process found a match for this organization in your database, its ID appears. If more than one or no potential match is found during the organization search process, *Error* appears in the Search field of the Org Process Options page. In such a case, an organization does not appear in this page. To investigate the reason for the error, go to the EDI TS130 Staging - Messages page. If no match is found, you must manually choose the appropriate organization ID. If the organization does not exist, you'll need to add it to your database and return to this page to select the new ID.

	See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Adding Organizations to Your Database".
Term Type	The type of term used by this external organization.
External Career	The external career for this organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Graduate, High School, Law, Medical,* or *Undergraduate.*
Inbound School Type	The EDI school type for this external organization comes from the EDI record. Its description displays next to the field.
ACT Code, ATP Code, FICE Code, and **IPEDS Code**	The ACT code, ATP code, FICE code, and IPEDS code appear. The organization search process uses these codes to search for a matching external organization in the database.
Organization Address	Click this button to access address information for this external organization.

Reviewing EDI TS130 Staging Academic Status Data

Access the EDI TS130 Acad Status page.

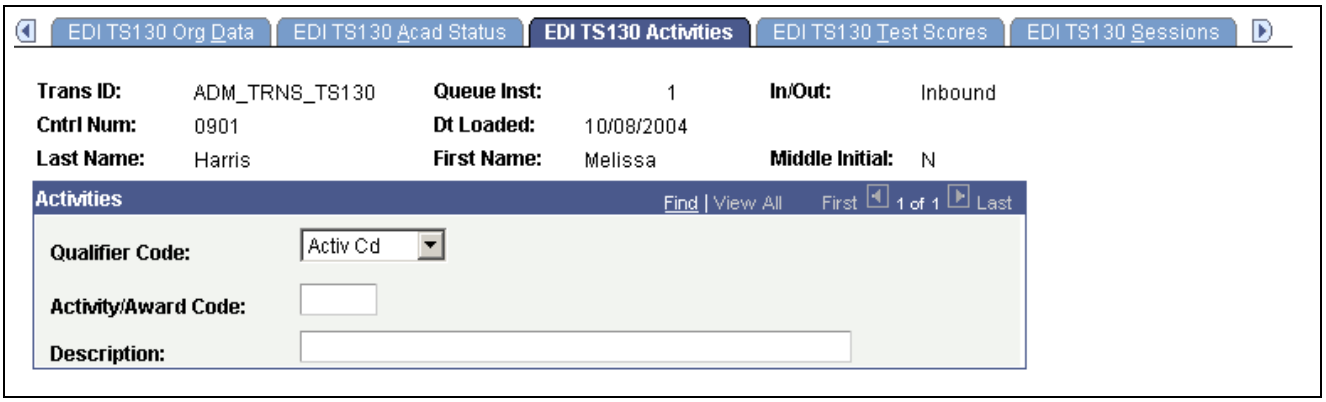


EDI TS130 Acad Status page

View additional information about the student's attendance at the organization listed on the EDI TS130 Org Data page. After you post the EDI TS130 data, you can view transcript data for this person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Activity Data

Access the EDI TS130 Activities page.



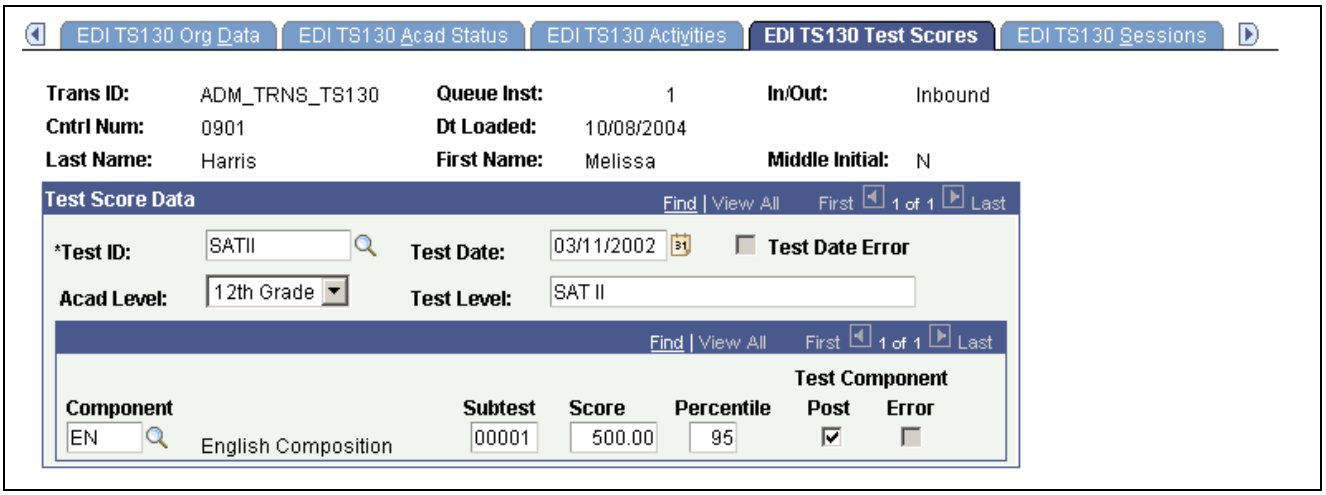
EDI TS130 Activities page

Qualifier Code Identifies a specific industry code list, such as *Activ Cd* (activity code) or *Award Cd* (award code).

Note. You can view activity code information on the Extracurricular Activities page and award code information on the Honors/Awards page after the person becomes a prospect or applicant and the data is posted to the database.

Reviewing EDI TS130 Staging Test Score Data

Access the EDI TS130 Test Scores page.



EDI TS130 Test Scores page

Test ID The ID of the test taken by this person. Define test IDs on the Test Tables page.

Test Date The PeopleSoft standard date format as translated from the EDI test date.

Test Date Error The system selects this check box if it detected an error on the test date.

Test Level A free-form text description of the level of the test for cases in which there are multiple levels to a test. For example, for the International Baccalaureate Test, “H” represents the higher level, and “S” represents the subsidiary level.

Component The system translates the test component to your institution component code by matching the subtest code delivered with the EDI load and the subtest code on the Test Tables page.

Subtest (subtest code) The test component code from the EDI record. A corresponding subtest code must be defined for the test component on the Test Table for the test component to be populated during the TS130 load process.

Score The reported score from the EDI load.

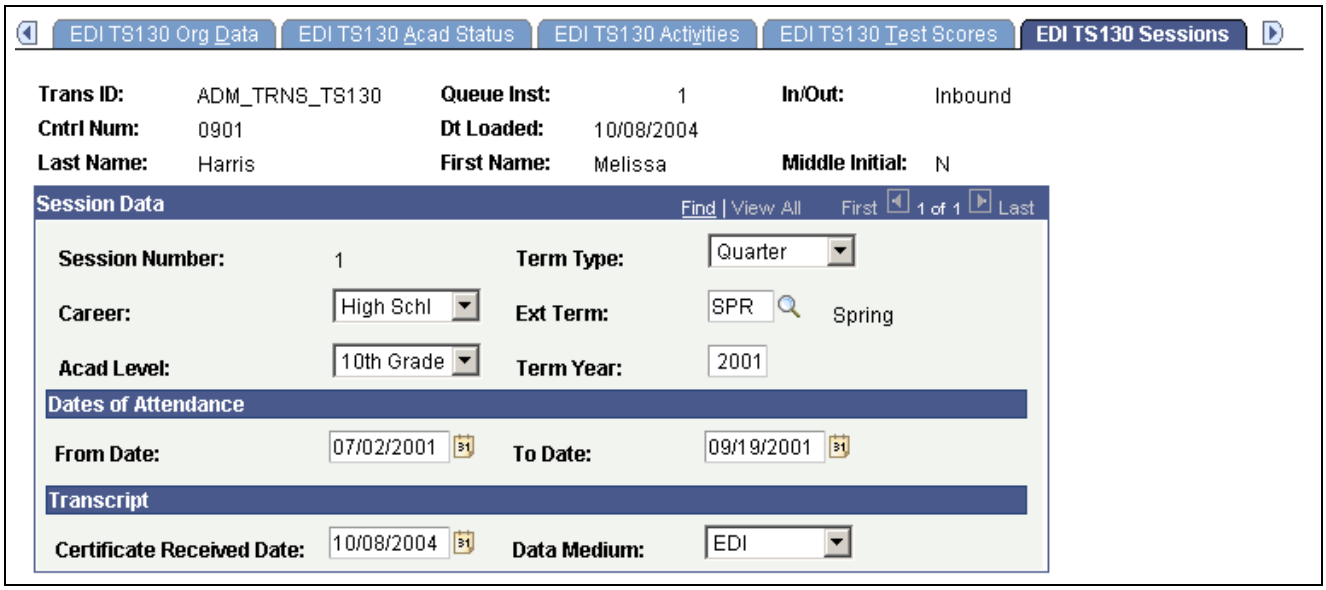
Post The system selects this check box if the component will be posted to your database.

Error The system selects this check box if it detected an error on the test component.

Note. You can view the test results posted for a person through the Academic Test Summary page or the Test Results page.

Reviewing EDI TS130 Staging Session Data

Access the EDI TS130 Sessions page.



EDI TS130 Sessions page

Term Type The term type used by this external organization. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *(none), Full Year, Miniterm, Other, Quarter, Quinmester, Semester, Trimester* and *Unknown.*

Career The external career to which this transcript session pertains. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Graduate, High School, Law, Medical,* and *Undergraduate.*

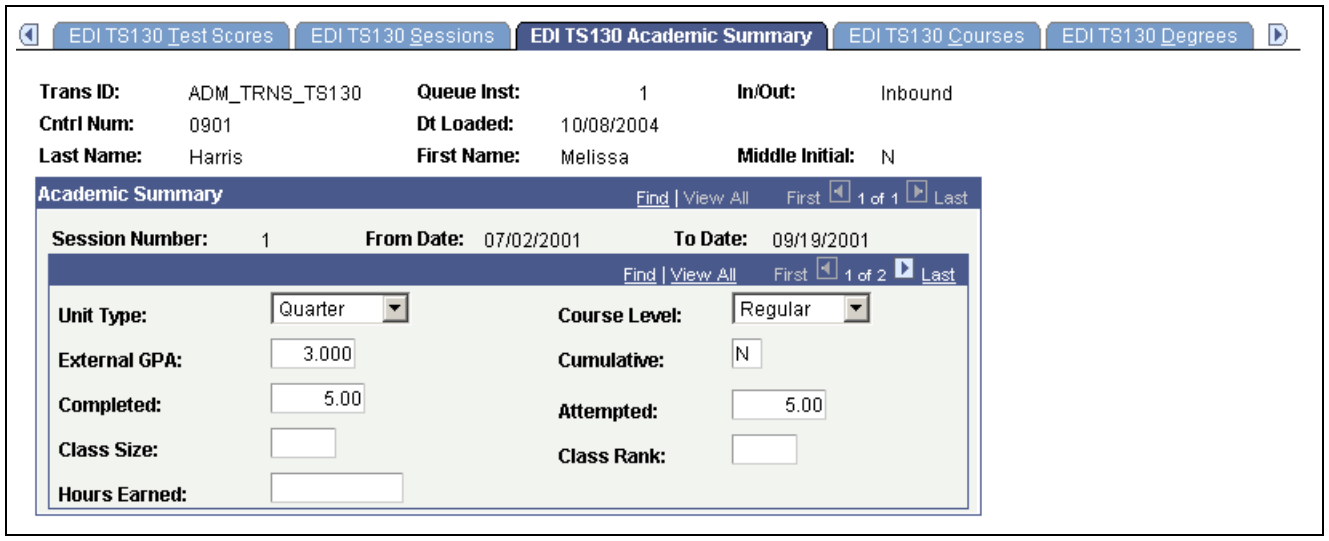
Ext Term (external term) The actual external term this data is regarding (such as *FALL* or *SPRING).* The values available to you in this field depend on what you have entered in the Term Type field. Define external terms on the External Term Table page.

Acad Level (academic level) The academic level of the person at the time this data was collected or issued. Values for this field are delivered with your system as translate values. You can modify these translate values. Examples of the delivered values are *10th Grade, 11th Grade, Freshman, Postdoctoral,* and so on.

Term Year	The term year pertinent to this session.
From Date and **To Date**	The first and last date the applicant attended this school for this session.
Certificate Received Date	The date you ran the EC Inbound Agent process.
Data Medium	The data medium default for this session is *EDI.* Values for this field are delivered with your system as translate values. You can modify these translate values.

Reviewing EDI TS130 Staging Academic Summary Data

Access the EDI TS130 Academic Summary page.

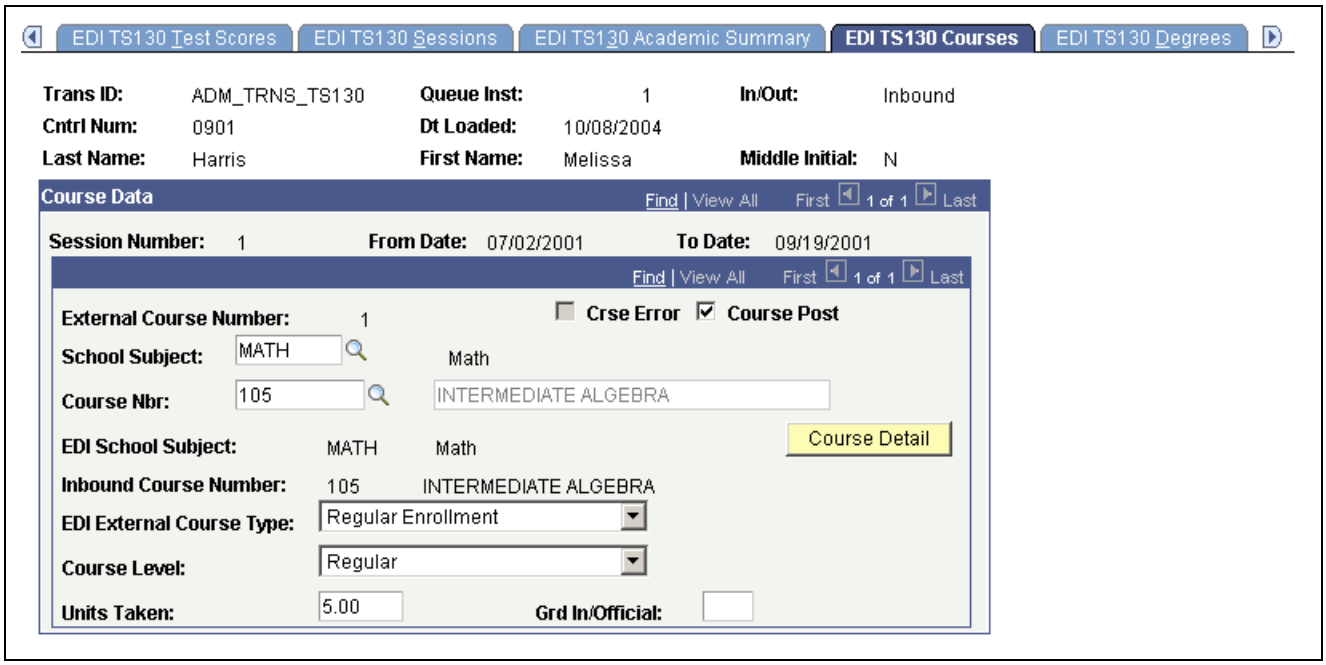


EDI TS130 Academic Summary page

View academic data specific to the session listed for the student. This will include grade point average, units attempted and completed as well as class rank information. If an N appears in the Cumulative field, the data shown is specific to the session listed. If a Y appears in the Cumulative field, the data is cumulative to show overall academic statistics as of the end of the session listed. The latest cumulative information is posted to the academic summary section of the Education component during the search/match/post process.

Reviewing EDI TS130 Staging Course Data

Access the EDI TS130 Courses page.



EDI TS130 Courses page

The Org Search Process finds course matches based on the EDI School Subject and EDI Course Number. The EDI fields are compared against the School Subject and School Course Number defined for the Organization on the School Course Classification page. If a match is found, the School Subject, Course Number and Description from the School Course Classification Table are populated on EDI TS130 Courses and the Course Post flag is set to Y. If a match is not found based on the Subject and Number during the Org Search Process, the Edit Process Option will be set to Error and the Course Error flag will be set to Yes on the EDI TS130 Process Options page.

You can choose to post the course without having a match. The error flag will not be set on the course and you are able to select Course Post which allows the course to be posted to External Course instead of having to manually data enter the course. You can select the School Subject and Course Nbr prompts to search for an appropriate course or leave the fields populated as they are. If you determine you want this course to be posted even though a match was not found, select Course Post and Save. If you select Course Post for all the courses that did not find a match and save, the Edit Process Option on EDI TS130 Process Options will automatically change from Error to Complete. If you decide not to post one or more courses, you will need to manually go change the Edit Process Option to Complete in order for the transcript to be posted.

External Course Number The sequential number of this row of course data. The first data item (or row) loaded is *1*. The next row is *2,* and so on. Courses fall under a session.

Crse Error (course error) The system selects the course error display-only check box if there was an error during the posting process. For example, the system selects this check box if it fails to find a matching course for the course loaded through the EDI load. See the Messages page for more information on this error.

Course Post The system selects this check box if this course will be posted to your database.

School Subject If the system finds an external subject area on the School Course Classification page for this school that matches the external subject area loaded through the EDI load, it populates the subject area from the School Course Classification page here. If it does not find a match, it populates the value from the External Subject Area field here, and selects the Crse Error check box. The system compares the subject areas when you post the record.

Course Nbr (course number) If the system finds a course description and external subject area on the School Course Classification page that matches the description of the EDI course number and the external subject area from the load, it populates the course number here, and the description in the field to the right. If it does not find a match, the system leaves this field blank and selects the Crse Error check box. The system compares the course descriptions when you post the record.

Career The external career comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

EDI School Subject The external subject area loaded from the EDI load. When you post this record the system compares this value to the external subject areas and course descriptions set up for this external organization on the School Course Classification page. If it finds a match it populates the School Subject field with the corresponding subject area from the School Course Classification page. If it does not find a match the system populates the School Subject field with the value in this field. The description appears next to the field.

EDI Course Number The course number loaded from the EDI load. The description from the EDI load appears next to this course field. When you post this record the system compares the description of the EDI course number and the external subject area to the course descriptions and external subject areas set up for this external organization on the School Course Classification page. If it finds a match it populates the Course Nbr field with the corresponding course number from the School Course Classification page. If it does not find a match the system leaves the Course Nbr field blank and selects the Crse Error check box.

The Description field is display-only if a match was found from your School Course Classification setup. If a match was not found, the Description field is editable.

EDI External Course Type The external course type defining this course, such as *Course* and Event. External Course Type comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Course Level The course level comes from the EDI load. This course could be described, for example, as an *Honors, AP,* or *Regular* course. Values for this field are delivered with your system as translate values. You can modify these translate values.

Units Taken The number of units taken for this course.

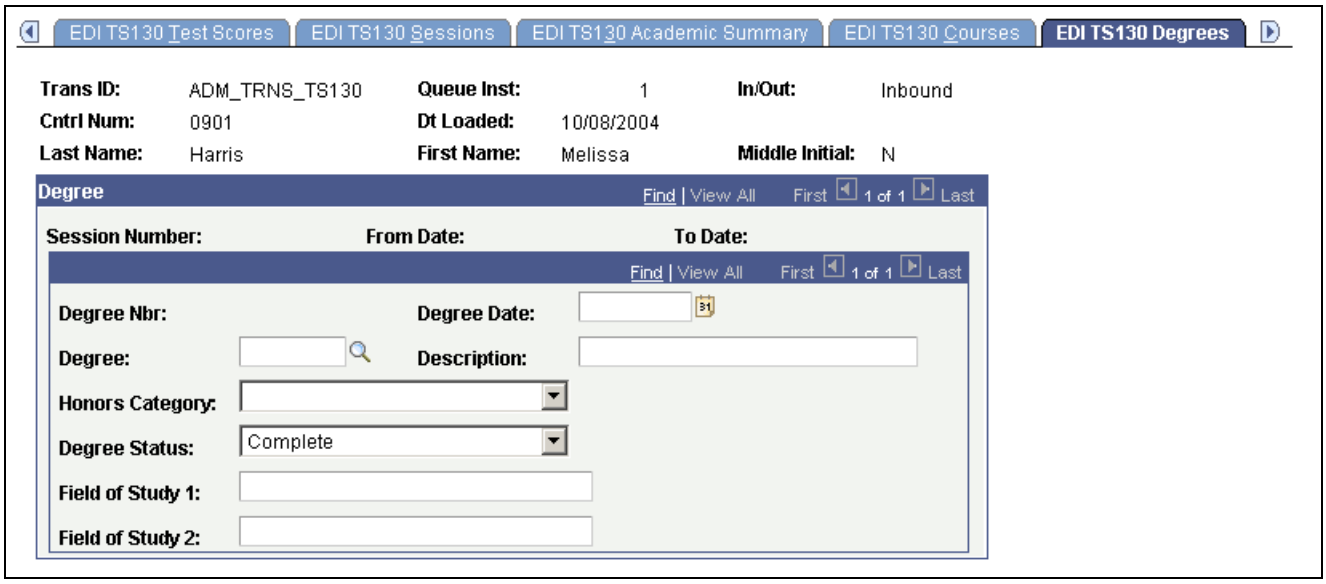
Grd In/Official (grade in/official) The grade information for this course.

Course Detail Click this button to view additional data regarding this course.

Note. View transcript data posted through the EDI load for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Degree Data

Access the EDI TS130 Degrees page.



EDI TS130 Degrees page

Degree Nbr (degree number) Displays the sequential number of this row of degree data. The first data item (or row) loaded is *1*. The next row is *2,* and so on.

Degree Date The date the student received or will receive this degree.

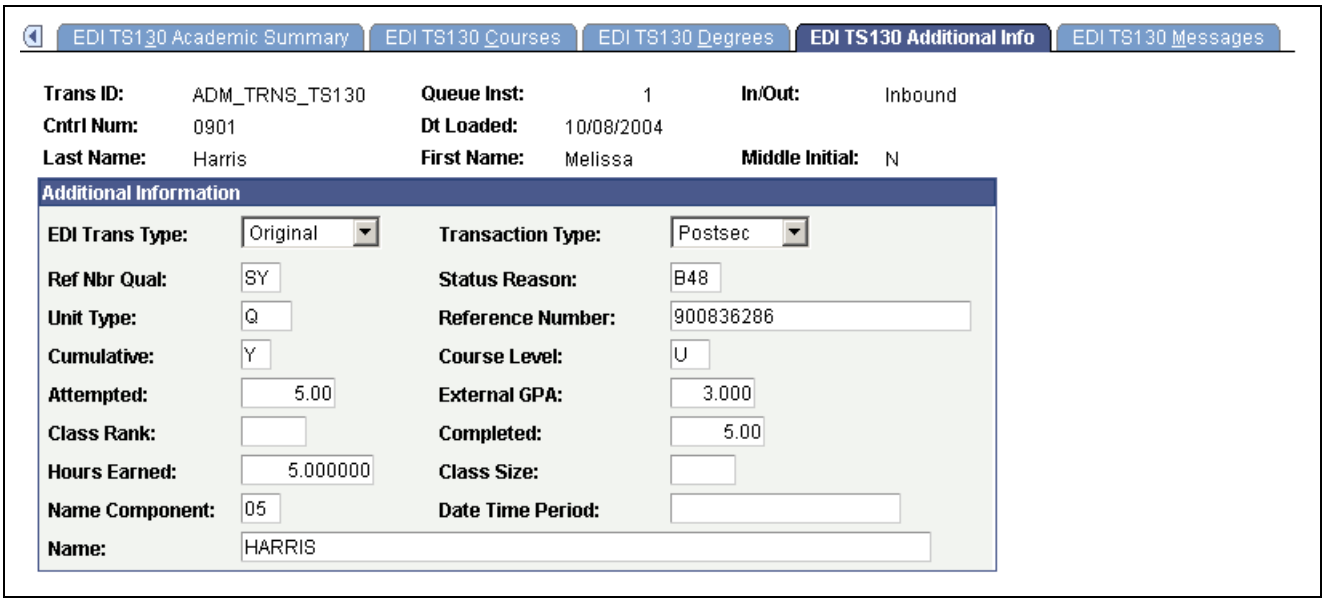
Honors Category Honors the person received for this degree (if applicable). Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Cum Laude, Magna Cum Laude, None,* and *Summa Cum Laude.*

Field of Study 1 and **Field of Study 2** The particular subject areas or concentrations for this degree (if applicable).

Note. You can view the degree data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Additional Information

Access the EDI TS130 Additional Info page.



EDI TS130 Additional Info page

EDI Trans Type The purpose of the transaction. The possible values are *Original, Replace, Duplicate, Response, Re-Submission, Confirmation, Mutually Defined.*

Transaction Type The type or transcript or student record being sent. The possible values are *District* or *Postsecondary*.

Ref Nbr Qual (reference number qualifier) A code identifying the type of student identification being sent in the Reference Number field. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.

Status Reason The reason the transcript or student record is being sent. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.

Unit Type The external unit type from the last SUM loop transmitted for the student indicating the type of credit used by the sending institution. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.

Reference Number The reference information as defined by the reference identification qualifier field.

Cumulative An indicator of whether or not the data on this page is a summary or all work included in the record. A *Y* in the field indicated the data is cumulative.

Course Level The level of work which is reflected in the GPA and hours on this page. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.

Attempted The total number of units the student attempted on this record as transmitted in the last SUM loop of the record.

External GPA (test date) The grade point average for the student as transmitted in the last SUM loop of the record.

Class Rank The class rank of the student as transmitted in the last SUM loop of the record.

Completed The total number of units the student attempted and earned on this record as transmitted in the last SUM loop of the record

Hours Earned The total number of hours included in the grade point average for this summary as transmitted in the last SUM loop of the record.

Class Size The total number of student in the class to help position the student's rank as transmitted in the last SUM loop of the record.

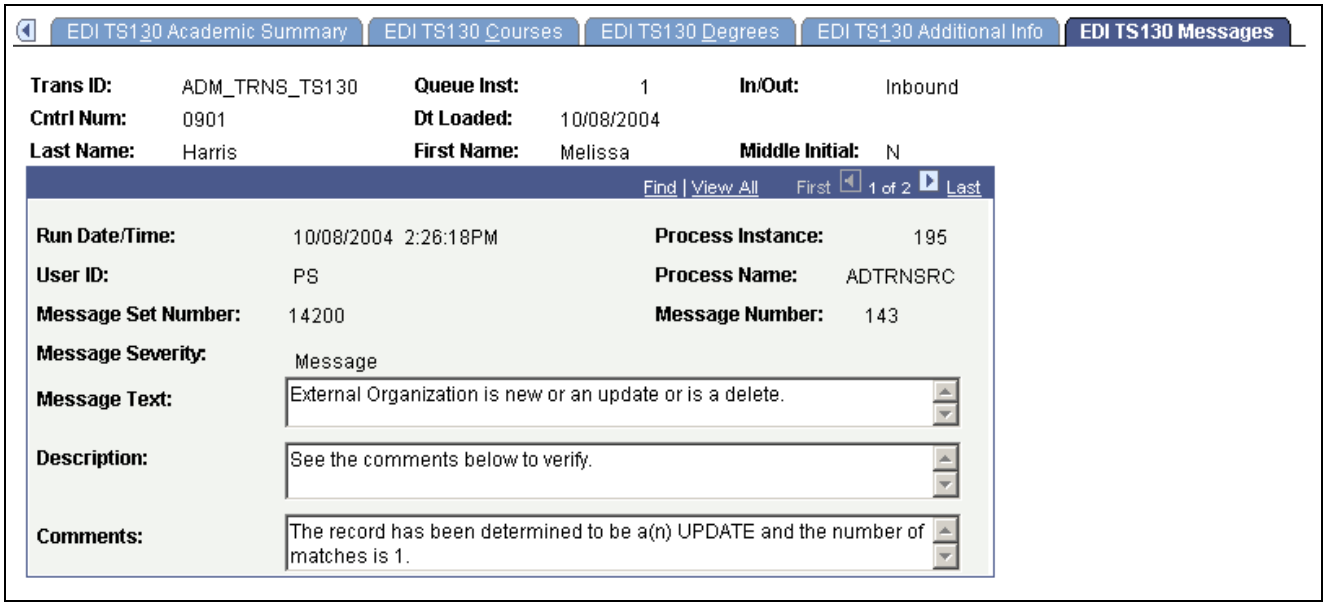
Name Component The code identifying the type of name component. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.

Date Time Period The date the class rank was determined.

Name The free-form text of the name component or the full name as indicated in the name component field.

Reviewing EDI TS130 Messages in the Staging Table

Access the EDI TS130 Messages page.



EDI TS130 Messages page

Any informational and error messages that the EDI TS130 load, organization search, search/match, or posting processes generates appears on this page. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your EDI processing. To do such an analysis, you would need to wait to purge your EDI messages until you have completed your analysis.

You can also look to these messages to ascertain any changes you want to make to your staging data before posting it to your database.

Run Date/Time The day and time the last process ran for this record.

Process Instance The process number of the last process run for this record.

User ID The user ID of the person who ran the last process for this person.

Process Name The name of the last SQR run for this record. For example, in the previous page example, the last SQR run was ADTRNPST.SQR (the load process).

Message Set Number and **Message Number**	The message set number and message number, which come from the message catalog.
Message Severity	The message severity (such as *Message* or *Error)*.
Message Text	The actual message on this row of data.
Description	Details about the message in the Message Text area.
Comments	Results or other additional information about the message.

Using the Organization Search Process

After you have loaded the TS130 data and corrected any error resulting from the load process, run the organization search process to match the organization and course data.

When you click the Run button, the Organization Search process does the following: Uses the FICE, ATP, ACT, or IPEDS code found on the EDI TS130 Staging, EDI TS130 Org Data page to find a match against the same codes stored on the Organization Table, School Data page. If a match is found, the system populates the Ext Org ID, Term Type, and External Career on the EDI TS130 Org Data page.

The Term Type and External Career will only be populated if the System Defaults for those fields are populated on the Organization Table, School Data page.

The system updates the EDI TS130 Courses page (Develop Enrollment, Process External Data, Use A-F, EDI TS130 Staging, EDI TS130 Courses) based on the search process. The system compares the EDI School Subject and EDI Course Number on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page (Organization Data, Use, School Course Classification).

If the system finds a match, it sets the course to Course Post. If the system does not find a match, it sets the Crse Error (course error) flag for the course and also sets it on the EDI TS130 Staging, EDI TS130 Process Options page.

To post the course as it is, select the Course Post check box and save the page. If you post all of the courses for which no match was found, the Edit Process Option field on the EDI TS130 Process Options page automatically changes from Error to Complete. If you decide not to post one or more courses, you must manually change the Edit Process Option field to Complete in order for the transcript to be posted. To rectify a course error: 1. Clear the Course Nbr (course number) field. 2. Press TAB. 3. Click the prompt to select the appropriate course.

The system clears the Crse Error check box but you must select Course Post to post the course. The appropriate courses do not appear if you do not press TAB before selecting the course number prompt. You must return to TS130 staging and correct the errors before posting the data.

This section discusses how to run the organization search process.

Page Used to Run the Organization Search Process

Page Name	Object Name	Navigation	Usage
EDI TS130 Org Search (organization search)	ADM_TS130_ORG_PARM	Student Admissions, Application/Transcript Loads, TS130, Organization Search Process	Run the process to match organization and course data from the transmitted student record.

Setting Up TS130 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the EDI TS130 data, and then you can run both processes at once: to search for matching people in your database and to post the external EDI TS130 data according to the parameters you set up. The EDI TS130 Post process contains logic to prevent the posting of duplicate data in the following areas: External data and external academic summary. The following fields are used to determine if a new row should be added to external data and external academic summary during the process: EmplID, External Organization ID, Career, Data Source, Transcript Type, Transcript Status, Academic Level, From Date and To Date. If the session data on the EDI TS130 staging matches the data on the External Data page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15) or Reissue (18). In this case, the existing data is updated with the new data. If the data does not match, a new row is added.

External degree: The following fields are used to determine if an external degree should be added during the process: EmplID, External Org ID, External Career, Data Source, Degree Status, Degree Date and Degree. If the degree data on EDI TS130 staging matches the data on the External Degree page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15) or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. If the data does not match, a new row is added.

External courses. The following fields are used to determine if an external course should be added during the process: EmplID, External Org ID, Data Source, School Subject, Course Number, Begin Date and End Date and Grade In. If the course data on EDI TS130 Staging matches the data on the External Course page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15) or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. Additionally, if the Grade In field on the External Course page is blank and the remaining data matches, the Grade In field will be updated with the grade from EDI TS130 Staging. If the data does not match, a new row is added.

This section discusses how to:

- Set up search/match parameters.
- Post the EDI TS130 external data.

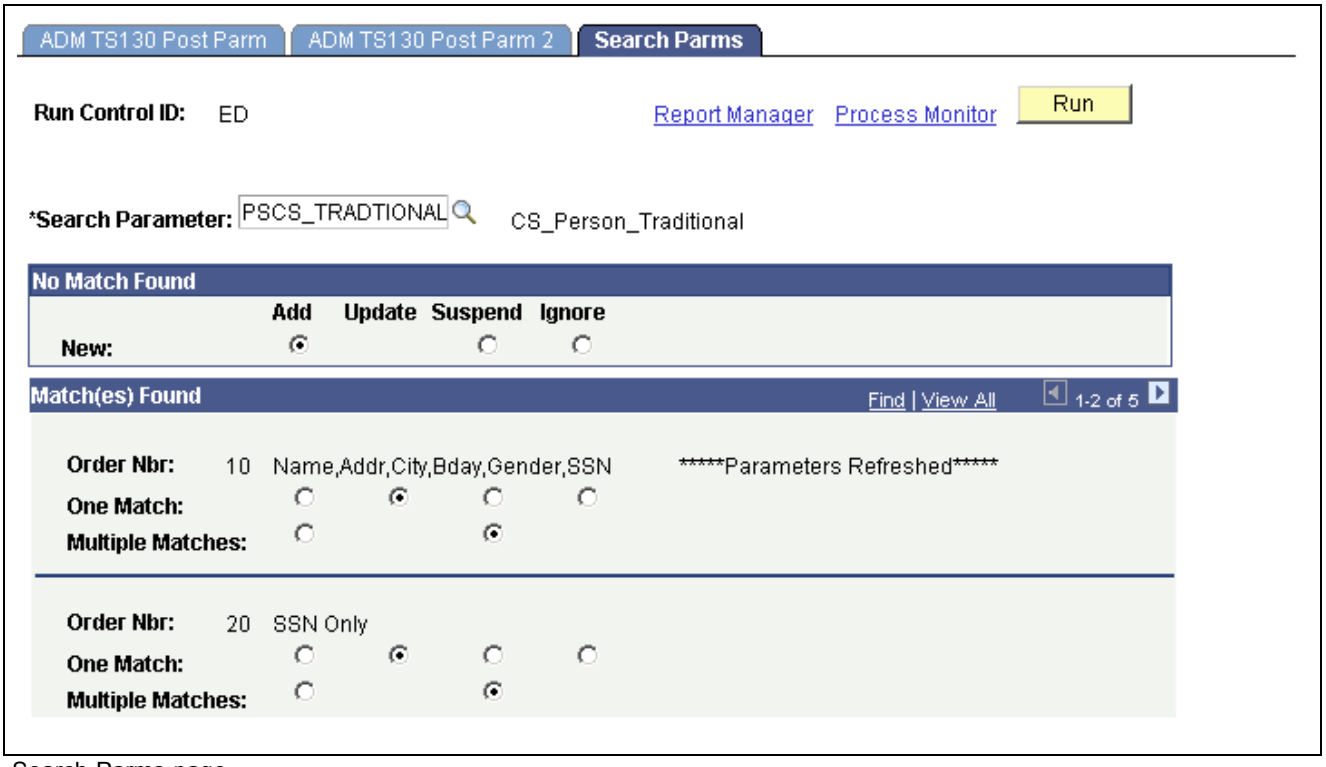
Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the EDI TS130 data to the database in one step.

Pages Used to Set Up TS130 Search/Match/Post Parameters, Process, and Post the EDI Staging Files

Page Name	Object Name	Navigation	Usage
Search/Match Parameters	SEARCH_PARMS	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Search Parameters	Set up your search/match parameters for processing the EDI TS130 transcript staging table.
Post Parameters	ADM_TS130_PST_PARM	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm	Set up post parameters and to post EDI TS130 transcript data. You can post a single record or all records in the staging table.
Post Parameters	ADM_TS130_PST_PRM2	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm 2	Set up your address type for the search/match process.

Setting Up Search/Match Parameters

Access the Search Parms page.



Search Parms page

Note. The words "Parameters Refreshed" appear if this is the first time you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Matches Found

New Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database.

Add: Add the unmatched record to your database, including personal data.

Suspend: Keep the unmatched record in the suspense file to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Order Nbr (order number) For each order number, select what you want to do with the EDI record if the search/match/post process discovers one or more matching records.

One Match and **Multiple Matches** Select whether you want to add, update, suspend, or ignore matching records.

Add: Add a new record to your database using the suspense record.

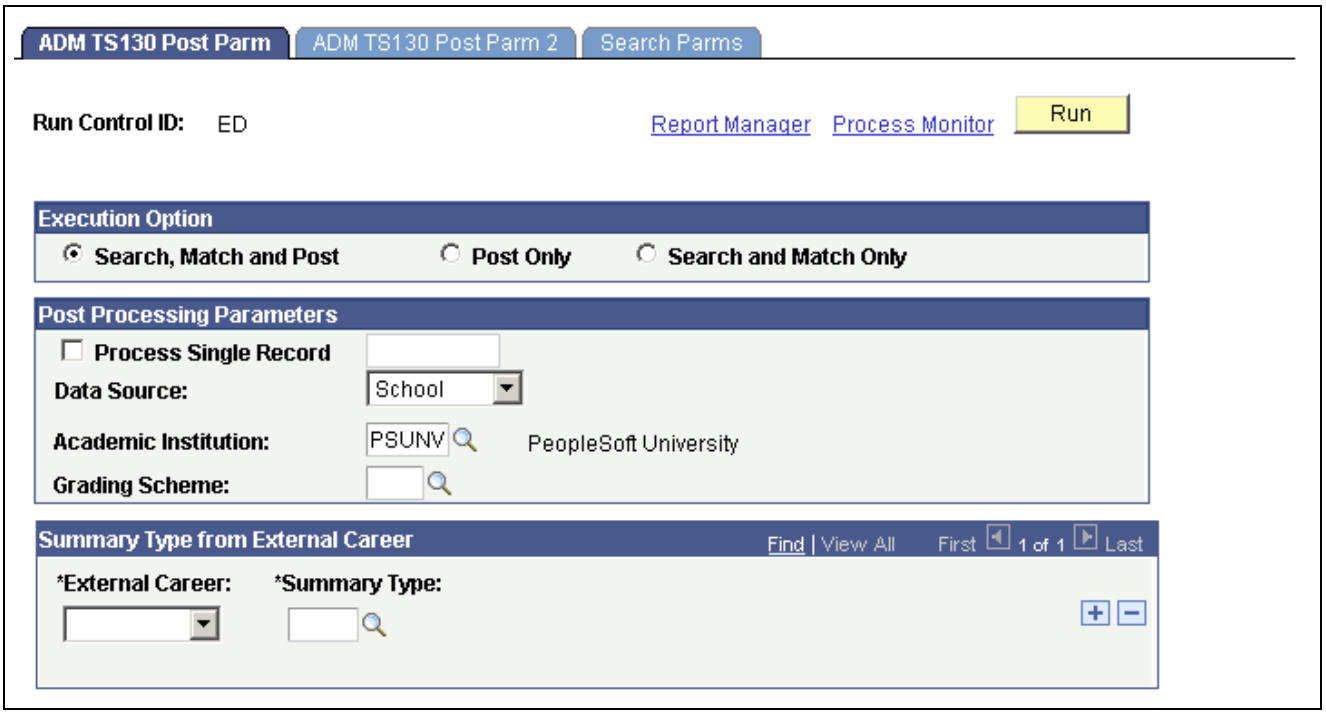
Update: Update the existing record with the data in the suspense record. Remember, the process does not update bio/demo data.

Suspend: Keep the suspense record back in the suspense table. You need to determine manually whether or not this record matches a record in your database.

Ignore: Ignore the suspense record that matched a record in your database. The process marks the record to be purged.

Posting the EDI TS130 External Data

Access the ADM TS130 Post Parm page.



ADM TS130 Post Parm page

Execution Option

Search, Match, and Post Select this option if you want to perform the search/match and the post process at the same time. This is the recommended option. The EDI TS130 Search/Match/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. After the process has performed the match, it posts the EDI TS130 external data to your database.

Post Only Select this option if you only want to post the external data to your database.

Search and Match Only Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update an existing person until you post the data.

Post Processing Parameters

Process Single Record Select this option to process and post a single record. After you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.

Data Source Choose the data source that you want the process to assign to any transcript information that posts to your database. The default is *School*. Select a different value if desired. Values for this field are delivered with your system as translate values. You can modify these translate values.

Academic Institution Enter the academic institution to post with the academic summary and course data.

Grading Scheme Enter the grading scheme to populate for each course on the External Courses page.

Summary Type from External Career

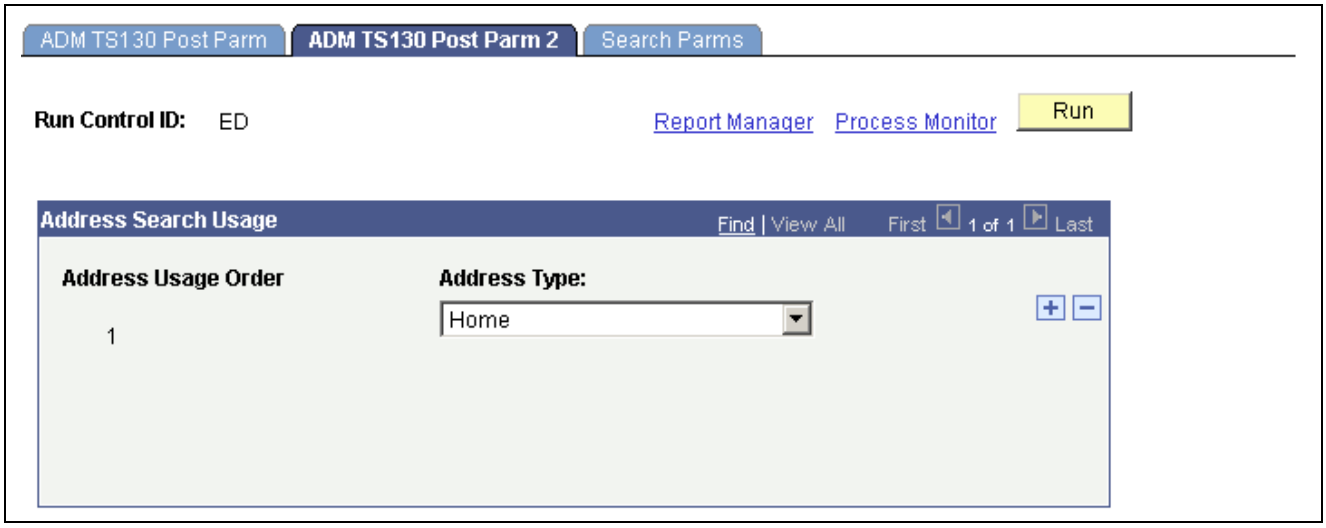
External Career and **Summary Type** Cross-reference fields that work in conjunction with external academic summary data from incoming transcripts. These two fields enable the posting of External GPAs to students' external education records—external GPA is tied to summary type, which is a child of external career. External career data is loaded with the TS130 table. By defining desired summary types for each external career that has been loaded, the EDI TS130 Transcript Srch/Post process writes external career, summary type, and external GPA data to the external education record.

Click the Run button to run the EDI TS130 Transcript Srch/Post process at user-defined intervals.

Note. You can view the data in the EDI TS130 Staging pages at this time if desired. To view the transcript data posted for a person, use the Education component.

Establishing Address Types

Access the EDI TS130 Post Parm 2 page.



ADM TS130 Post Parm 2 page

All of the addresses in EDI TS130 Staging post to the PeopleSoft tables. The Address Type chosen in the Address Search Usage hierarchy is used solely for search/match purposes.

Address Usage Order Indicates the usage order for the address type in the search process.

Address Type Enter the address type to be used in the search process.

Purging the EDI TS130 Staging Table and Messages

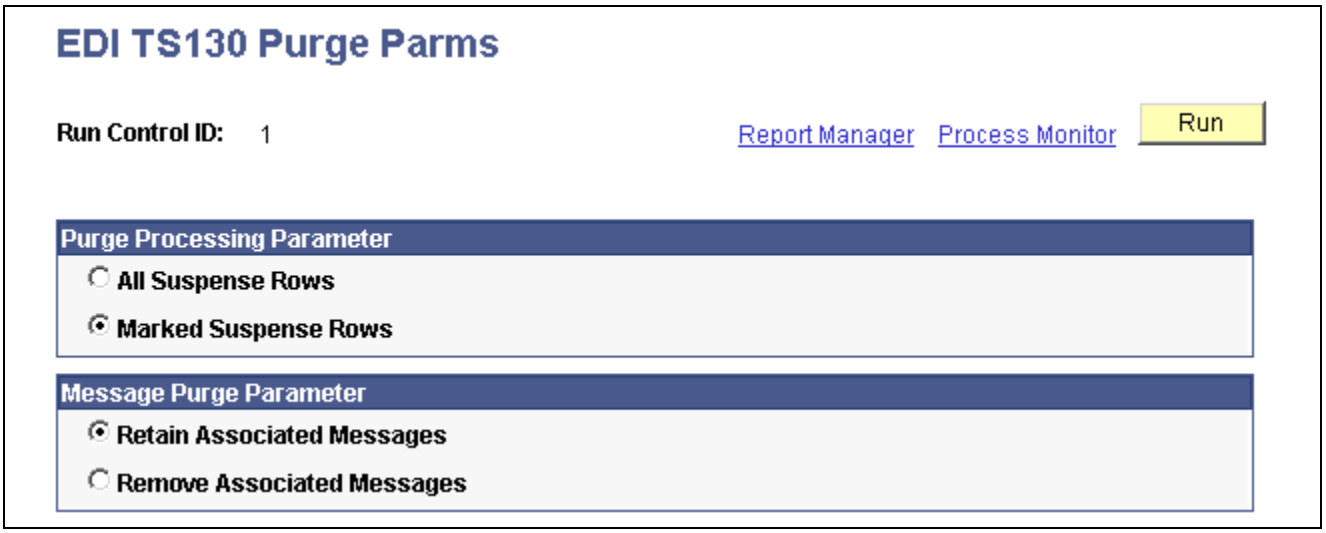
This section discusses how to purge the EDI TS130 staging table and messages.

Page Used to Purge the EDI TS130 Staging Table and Messages

Page Name	Object Name	Navigation	Usage
EDI TS130 Purge Parms (EDI TS130 purge parameters)	ADM_TS130_PUR_PARM	Student Admissions, Application/Transcript Loads, TS130, Purge Process	Purge records and messages, if applicable, from the EDI TS130 staging table.

Purging Staging Tables

Access the EDI TS130 Purge Parms page.



EDI TS130 Purge Parms page

Purge Processing Parameter

All Suspense Rows Select this option if you want to purge all records in your staging table, regardless of the posting status, as shown in the Post field in the Process Options and Org Process Options pages.

Marked Test Suspense Rows Select this option if you only want to purge those records in your staging table marked *Purge* in the Post field on the Process Options and Org Process Options pages.

Message Purge Parameters

Retain Associated Messages Select this option if you *do not* want to purge messages associated with the files that you are purging.

Remove Associated Messages Select this option if you *do* want to purge messages associated with the files that you are purging.

Click the Run button to run the EDI TS130 Transcript Purge process at user-defined intervals.

Purging All EDI Messages

This section discusses how to purge all EDI messages.

Page Used to Purge All EDI Messages

Page Name	Object Name	Navigation	Usage
EDI Message Purge	EDI_TS_MSG_PURGE	Student Admissions, Application/Transcript Loads, EDI All Message Purge	Purge all EDI messages. You can run a process to purge all EDI messages lingering in your staging files.

CHAPTER 16

Performing EDI TS189 Application Transactions

This chapter provides an overview and discusses how to:

- Load the EDI data for application transactions.
- Review and edit the EDI TS189 staging pages.
- Search for matching organization data.
- Set up TS189 search/match/post parameters, process, and post the EDI staging files.
- Purge the EDI TS189 staging table and messages.

Understanding EDI TS189 Application Transactions

PeopleSoft Recruiting and Admissions enables you to load applications through EDI (Electronic Data Interchange). This section discusses how to perform EDI TS189 application transactions.

To perform EDI TS189 application transactions:

1. Process the inbound EC agent.

   Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

   See Chapter 15, "Performing EDI TS130 Transcript Transactions," Processing the Schedule Inbound EC Agent, page 219.

2. Load the EDI data for application transactions.

   Run the TS189 Load Application Process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

   Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Process Options page.

4. Search for matching organization data.

   After you have loaded the application (TS189) data into the staging files, run the Organization Search Process. You must do the organization search as the TS189 load contains some organization data—course information associated with a particular organization—that must be identified to some record in the system.

5. After you have corrected all of the load errors in the suspense files, run the Search/Match/Post Process.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include name, social security number, birth date, and so forth) that matches the data that you're posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are truly duplicates.

6. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

   In the search dialog page of the TS189 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you are in the component, find the parameters for which the process identified a match, then use search match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

7. Run the Search/Match/Post Process again.

   The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Student Admissions, Application Maintenance, Add/Update a Person. To view a test score record that the search/match/post process created or updated, select Student Admissions, Application Entry, Academic Information, Test Results. To view the application created select Student Admissions, Application Maintenance, Maintain Application.

8. Purge files.

   Purge TS189 staging table records on the EDI TS189 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your EDI processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 250

Chapter 10, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 122

Chapter 14, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 174

Loading the EDI Data for Application Transactions

This section discusses how to use the EDI TS189 Load Parms (EDI TS189 load parameters) page to set up application load parameters and to load application data into staging tables.

Page Used to Load the EDI Data for Application Transactions

Page Name	Object Name	Navigation	Usage
EDI TS189 Load Parms (EDI TS189 load parameters)	ADM_TS189_LOD_PARM	Student Admissions, Application/Transcript Loads, TS189, Load Application Process, EDI TS189 Load Parms	Set up application load parameters and to load application data into staging tables. After you have processed your Inbound EC Agent, define parameters on the EDI TS189 Load Parameters page for the data you are loading. After you've done that, you'll run a process to load the data into staging files.

Loading Applications

Access the EDI TS189 Load Parms page.

Warning! We recommend that you complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Male, Female, and **Unknown** An EDI load does not include a person's prefix. It does, however, include gender. In these fields, enter the prefix you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Click the Run button to run the EDI TS189 Application Load/EDI process at user-defined intervals.

Note. You can view the data in the TS189 Staging pages at this time if desired.

Reviewing and Editing the TS189 Staging Pages

This section discusses how to use the TS189 Staging component to review or edit the application data loaded through the EDI transaction. If you have not run the posting process, any changes you make posts to your database when you run the posting process, which means that the data posts to the person's record (unless otherwise noted).

The TS189 application staging pages are holding tables and are not linked to your database. Personal, organization, and application data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data and the Application Maintenance, Extracurricular Activities, Honors and Awards, Education, Work Experience, and Test Results components. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

At any time during the TS189 application load process you can access the TS189 Staging pages to review the information stored here. For example, you might want to look at the data immediately after loading it, after processing it, after posting it, or after each of those steps, depending on your procedures.

If you have not run the posting process, then you can edit the data in these pages before it posts to your database. That way the edited data posts to the person's record.

Note. Be cautious when editing the data in your staging files prior to posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the proper page in your database to make any changes.

Note. Many of the TS189 Staging pages are similar to those with the same name in the TS130 Staging component. For these common pages, we provide an example of the TS189 page here but refer you to the corresponding TS130 page section for a description of the fields, since they are the same.

Pages Used to Review and Edit TS189 Staging Pages

Page Name	Object Name	Navigation	Usage
Process Options	ADM_TS189_PROC_OPT	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Process Options	Review or edit the process options in your TS189 staging table. This page provides the status of an TS189 application record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.
Org Process Options (organization process options)	ADM_TS189_ORG_OPT	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Org Process Options	Review or edit the process options for external organization records in your TS189 staging table.
Bio/Demo (biographic/demographic)	ADM_TS189_BIODEMO1	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Bio/Demo	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Bio/Demo 2 (biographic/demographic 2)	ADM_TS189_BIODEMO2	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Bio/Demo 2	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Names	ADM_TS189_NAM	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Names	View name component information for the application loaded through the TS189 load application process.

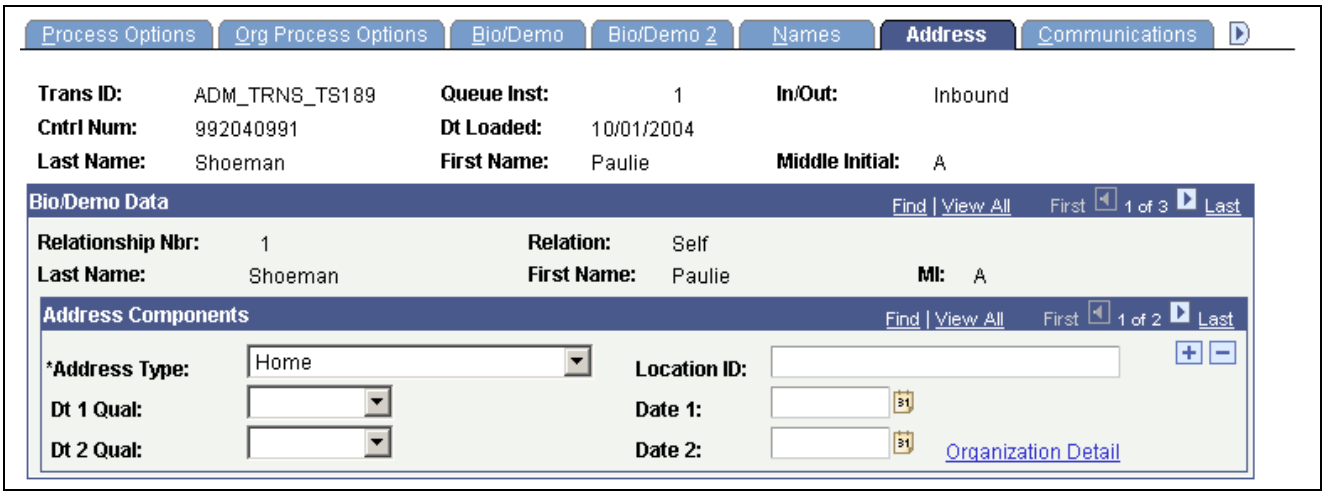
Page Name	Object Name	Navigation	Usage
Address	ADM_TS189_ADR	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Address	View additional address information loaded through the TS189 load application process.
Organization Detail	ADM_TS189_ADR_SEC	Click the Organization Detail link on the Address page.	View actual address information.
Communications	ADM_TS189_COM	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Communications	View details on TS189 communication data loaded through the TS189 load application process.
Languages	ADM_TS189_LANG	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Languages	View information concerning an applicant's language use and proficiency loaded through the TS189 load application process.
Recommenders	ADM_TS189_REC	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Recommenders	View information concerning individuals who recommended the applicant.
Address	ADM_TS189_REC_SEC	Click the Address link on the Recommenders page.	View address information for a recommender.
Residences	ADM_TS189_RES	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Residences	View residence data concerning the applicant and other related people.
Test Scores	ADM_TS189_TESTS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Test Scores	Review or edit test score data loaded through the TS189 load application process.
Ref Nmbrs (reference numbers)	ADM_TS189_REF	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Ref Nmbrs	View reference number information loaded through the TS189 load application process.
App Degree (application degree)	ADM_TS189_DEG	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Degree	Review or edit applicant degree data loaded through the TS189 load application process. Degree information falls under a session.
Application Data	ADM_T189_DEG_EC	Click the Application Data link on the Application Degree page.	View details about an applicant's academic background.
App Entry/Qstns (application entry/questions)	ADM_TS189_SSE	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Entry/Qstns	View information on additional applications questions and answers, if provided.

Page Name	Object Name	Navigation	Usage
Org Data (organization data)	ADM_TS189_ORG_DEMO	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Org Data	Review and edit the organization demographic data loaded through the TS189 load application process. Organization data does *not* post to your database. The organization data from the TS189 application load is matched up with an organization in your database. The matching ID is then inserted on this page and carried over to the subsequent pages in this component which contain application data regarding this organization. The system also uses the matching organization to populate organization information in the Education component
Sessions	ADM_TS189_SES	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Sessions	Review or edit transcript session data loaded through the TS189 load application process.
Acad Status (academic status)	ACAD_TS189_SST	Student Admissions, Application/Transcript Loads, TS189, TS189 Acad Status	Review or edit high school academic status data loaded through the TS189 load application process.
Cum GPA (cumulative grade point average)	ADM_TS189_SST2	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Cum GPA	Review or edit applicant cumulative GPA data loaded through the TS189 load application process. GPA information is under a session.
Courses	ADM_TS189_CRS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Courses	Review or edit applicant course data loaded through the TS189 load application process. Course information is under a session.
Employment	ADM_TS189_EMPLOY	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Employment	Review or edit applicant employment data loaded through the TS189 load application process. Employment information is under a session
Immunizations	ADM_TS189_IMMUNIZ	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Immunizations	Review or edit applicant immunizations data loaded through the TS189 load application process.

Page Name	Object Name	Navigation	Usage
Religion	ADM_TS189_RELIGION	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Religion	Review or edit applicant religion data loaded through the TS189 load application process.
Activities	ADM_TS189_ACTIVITY	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Activities	Review or edit applicant activities data loaded through the TS189 load application process.
Messages	ADM_TS189_MSGS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Messages	View EDI TS189 processing messages.

Reviewing TS189 Staging Address Data

Access the Address page.



TS189 Staging - Address page

Dt 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier)

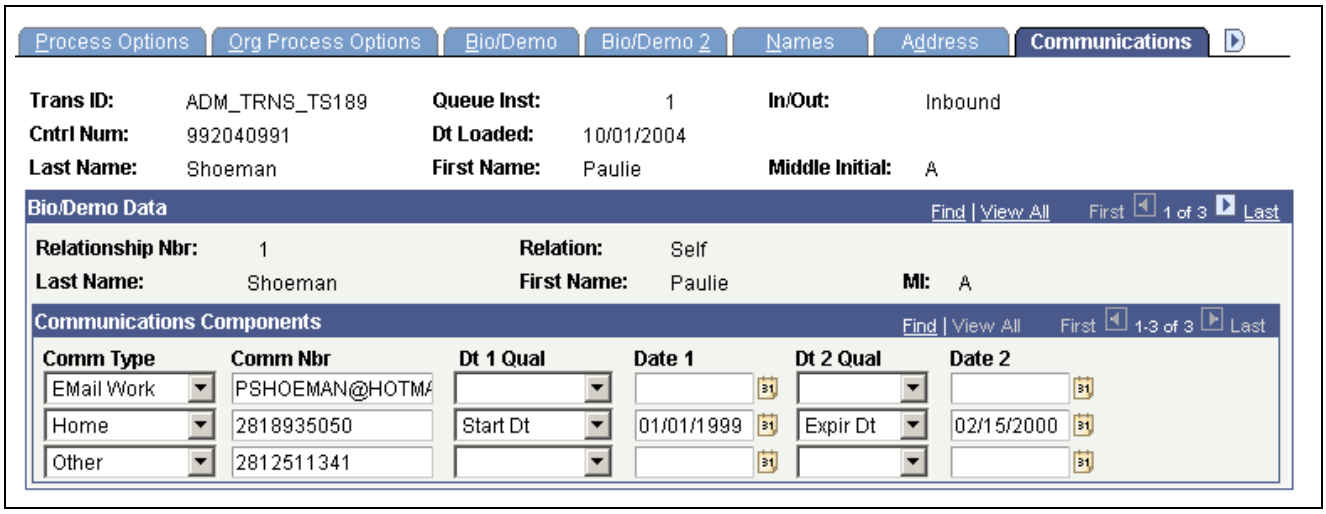
Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Organization Detail

Click this link to view or edit address information. The Address Detail page appears.

Reviewing TS189 Staging Communication Data

Access the Communications page.

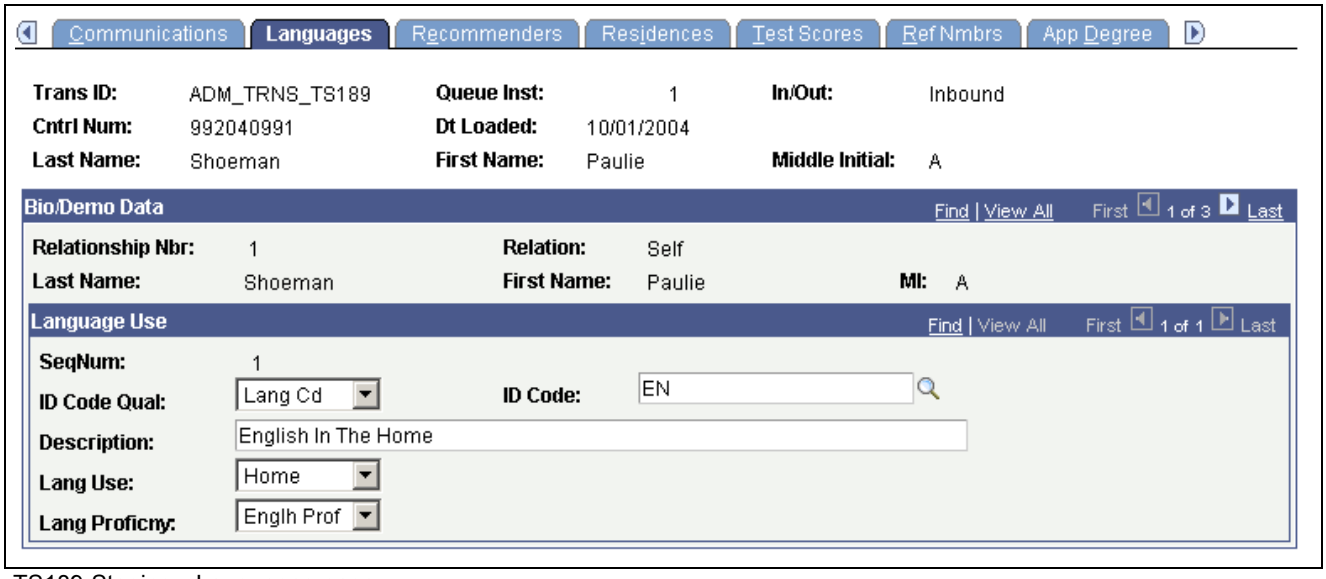


TS189 Staging - Communications page

DT 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier) Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Reviewing TS189 Staging Languages

Access the Languages page.



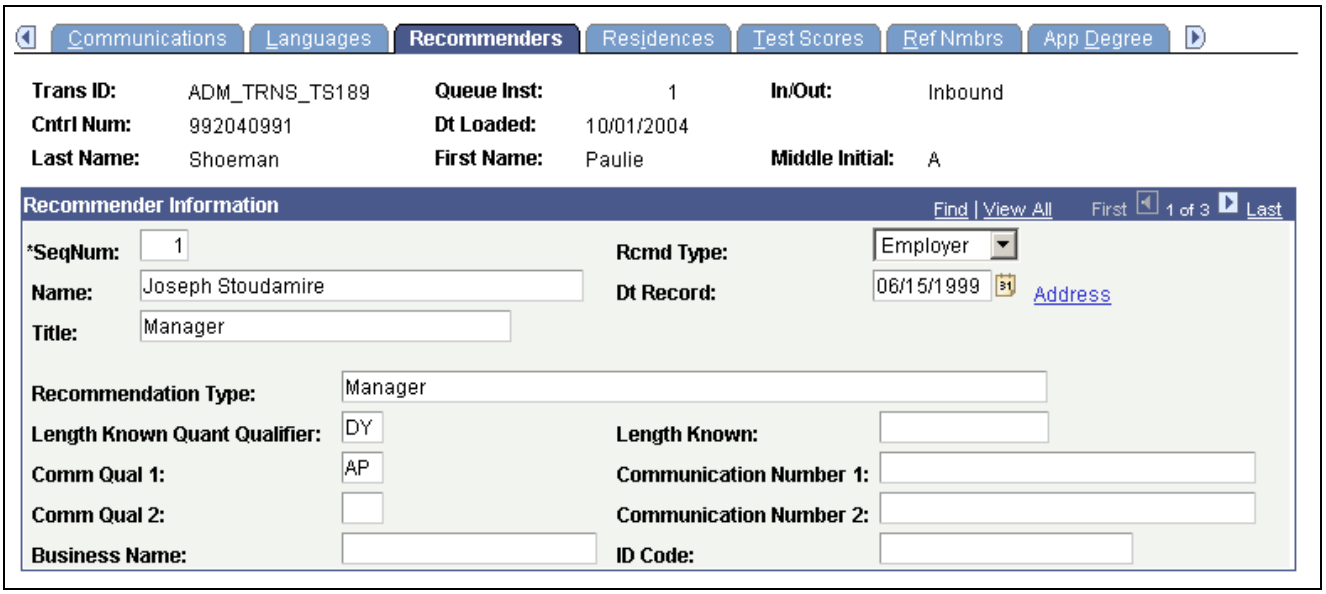
TS189 Staging - Languages page

ID Code Qual (ID code qualifier) Indicates which set of language codes is being sent. The options are *Lang Cd* (language code) and *Mutually.*

ID Code A code that identifies the language (such as *KO* for Korean).

Reviewing TS189 Staging Recommender Data

Access the Recommenders page.



TS189 Staging - Recommenders page

SeqNum (sequence number) The sequential number of this row of data. The first data item (or row) loaded is *1*. The next row is *2,* and so on.

Rcmd Type (recommendation type) The recommendation type that the system posts to the General Materials component.

Dt Record (date record) The date of the recommendation.

Recommendation Type The free-form name or mutually defined indicator for the type of recommendation being supplied when there is a need to distinguish types of recommendations. Types might include "counselor evaluation," "faculty evaluation," "supervisor recommendation," and so on.

Length Known Quant Qualifier (length known quantity qualifier) Codes that identify the format of the Length Known field. Possible codes are *DY* (days), *MN* (months), and *YY* (years).

Length Known The amount of time the recommender has known the applicant. The code in the Length Known Quant Qual field defines the format of the number in this field. For example, if Length Known contains the value *78,* and the Length Known Quant Qual field contains *DY,* then the recommender has known the applicant for 78 days.

Comm Qual 1 and **2** Codes identifying the type of communication number that appears in theCommunication Number 1 and 2 fields. Possible codes are:

Code	Name
AP	Alternate Telephone
AS	Answering Service
BN	Beeper Number

Code	Name
CP	Cellular Phone
EM	Electronic Mail
FX	Facsimile
HP	Home Phone Number
NP	Night Telephone
PC	Personal Cellular
TE	Telephone
WC	Work Cellular
WF	Work Facsimile Number
WP	Work Phone Number

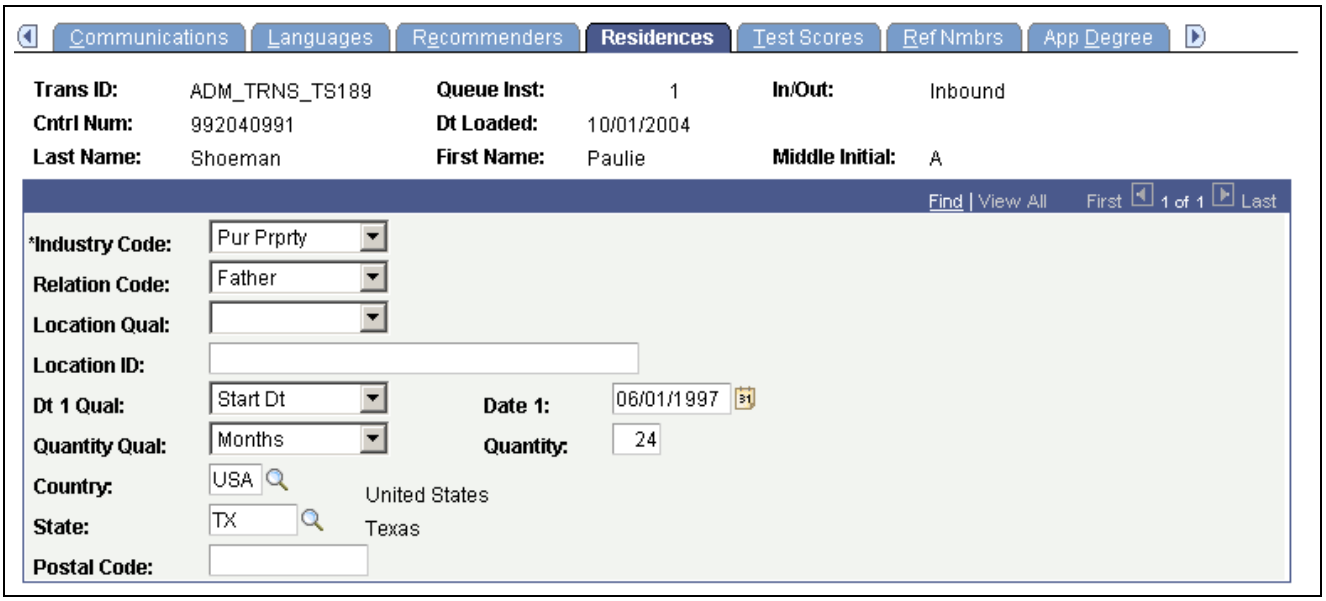
Communication Number 1 and **2** — The complete communications number including country or area code (when applicable).

ID Code — Identification of an organizational entity.

Address — Click to access address information for this recommender. The Address Detail page appears.

Reviewing TS189 Staging Residence Data

Access the Residences page.



TS189 Staging - Residences page

Industry Code Indicates a particular criteria or test for determining residency.

Relation Code Indicates the relationship to the student of the individual to which this residency test or criteria applies. For example (not comprehensive): *01* (spouse), *03* (parent), *26* (guardian), *32* (mother), and *33* (father).

Location Qual (location qualifier) Code identifying the type of location.

Location ID Code identifying a specific location.

Dt 1 Qual (date 1 qualifier) Identifies what the date in the Date 1 field represents. For example, the date could represent the start date, the end date, the expiration date, and so on.

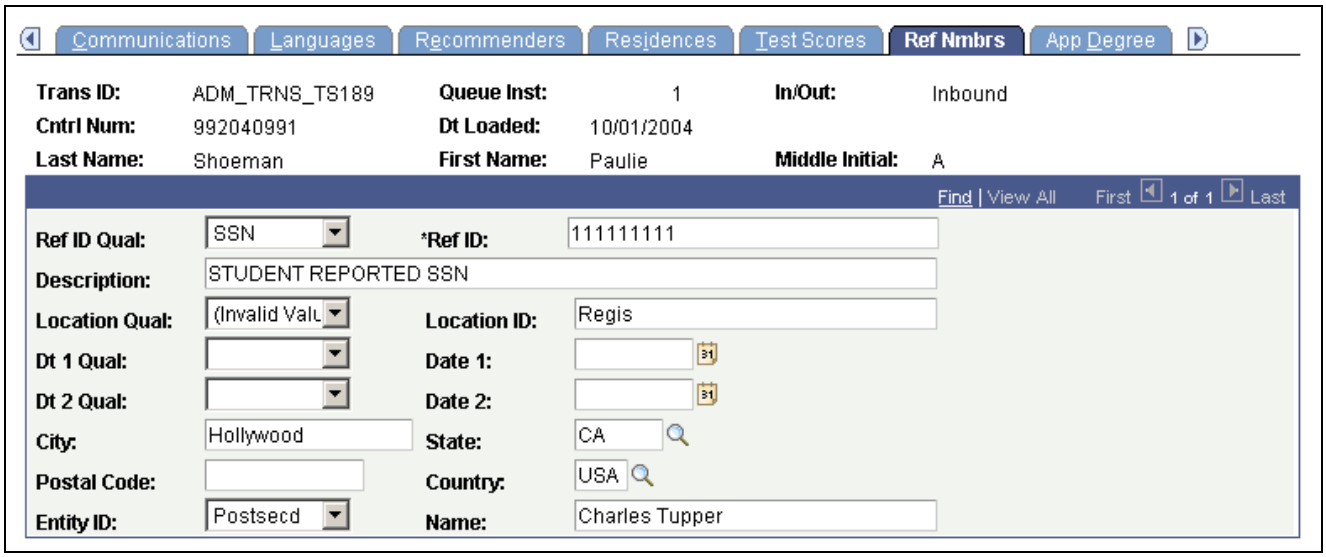
Date 1 The date that the Dt 1 Qual field identifies.

Quantity Qual (quantity qualifier) Identifies what the value in the Quantity field represents. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Days, Weeks, Months,* and *Years.*

Quantity The days, weeks, months, or years—as specified in the Quantity Qual field—that this person lived with this relation.

Reviewing TS189 Staging Reference Numbers Data

Access the Ref Nmbrs (reference numbers) page.



TS189 Staging - Ref Nmbrs page

Ref ID Qual (reference ID qualifier) A code identifying what the reference ID represents. Some examples of reference ID qualifiers are (not comprehensive): SSN, state ID, PIN, visa number, and so on.

Ref ID (reference ID) The Ref ID Qual field defines this number. For example, if the reference ID qualifier is *SSN,* then the reference ID number is the person's social security number.

Location Qualifier A code identifying the type of location.

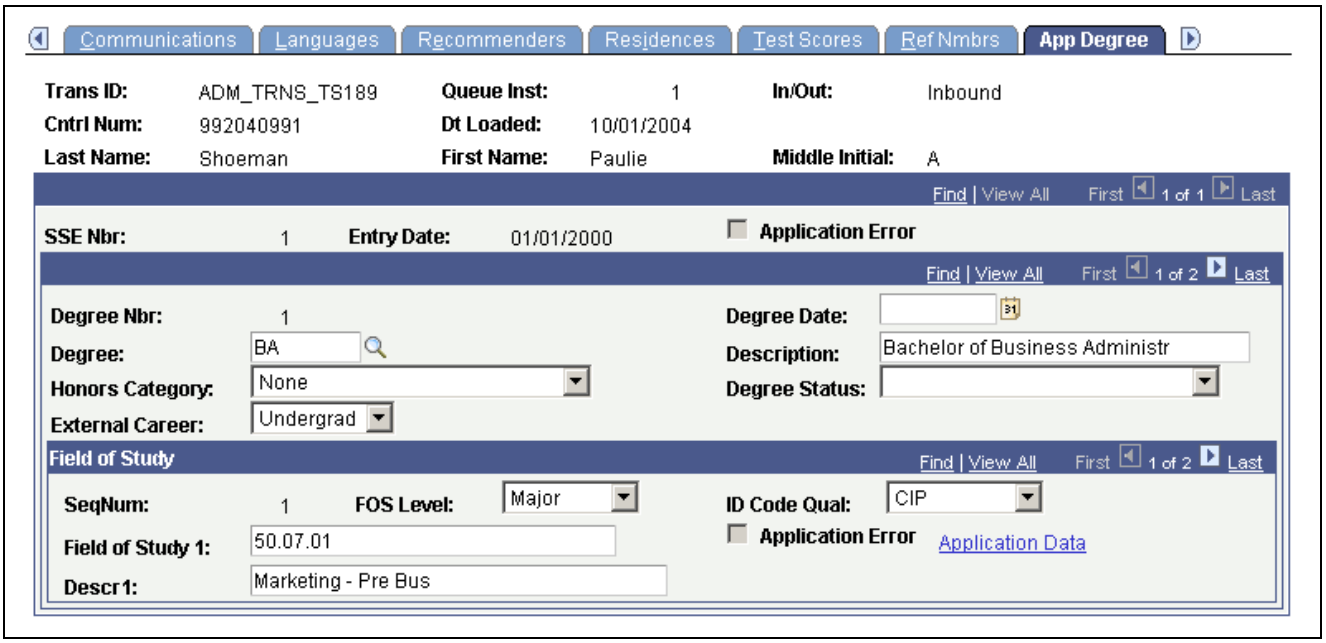
Location ID A code identifying a specific location.

Dt 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier) Identifies what the date in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, the expiration date, and so on.

Entity ID The type of entity to which this name and location applies (for example, school, city, county, and so forth).

Reviewing TS189 Staging Application Degree Data

Access the App Degree (application degree) page.



TS189 Staging - App Degree page

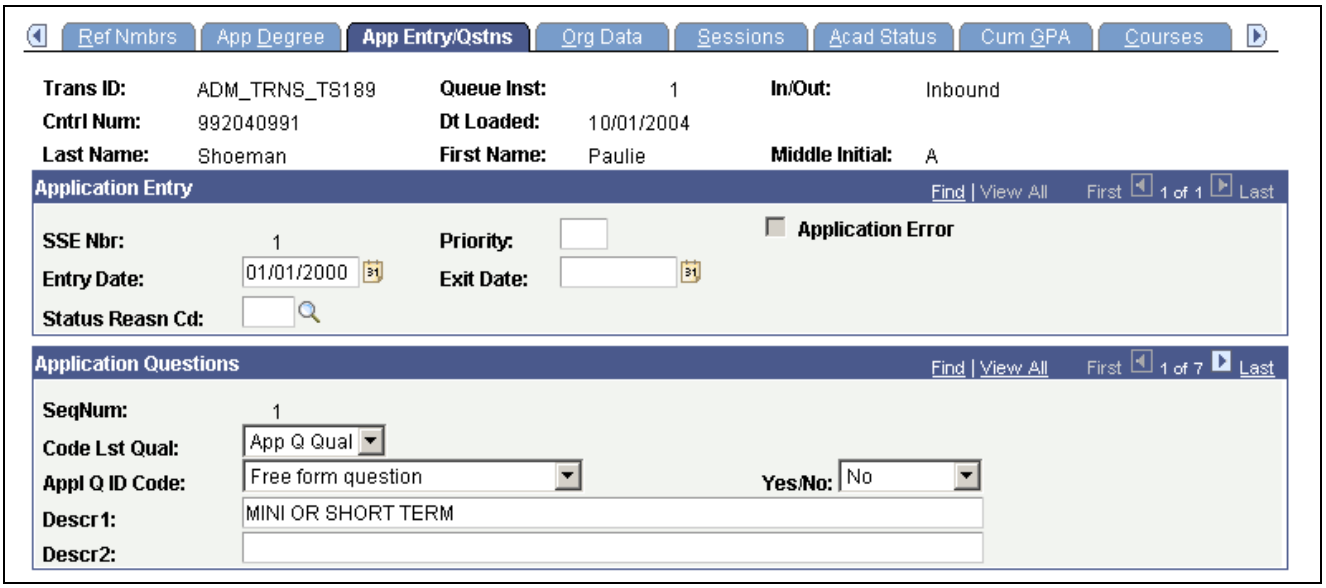
ID Code Qual (ID code qualifier) Identifies what the field of study represents. Mutually means that the value in the Field of Study 1 field is mutually defined.

Application Data Click this link to view additional application data. The Application Data page appears.

Note. You can view the transcript data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing TS189 Staging Application Entry/Questions

Access the App Entry/Qstns (application entry/questions) page.



TS189 Staging - App Entry/Qstns page

Priority A number that indicates the priority of choice for an intended entry into a school, school program, or postsecondary institution.

Application Error Indicates whether or not there was an error when loading this application data. (display-only)

Entered Date The applicant's desired entry date.

Exit Date The applicant's desired exit date.

Status Reasn Cd (status reason code) Indicates the status reason (such as dropout, graduated, and so forth).

Code Lst Qual (code list qualifier) A code identifying a specific industry code list. For example, *App Q Qual* (application question identifier) and *Mutually Defined.*

Appl Q ID Code (application question identifier code) A code identifying the type of question that was asked.

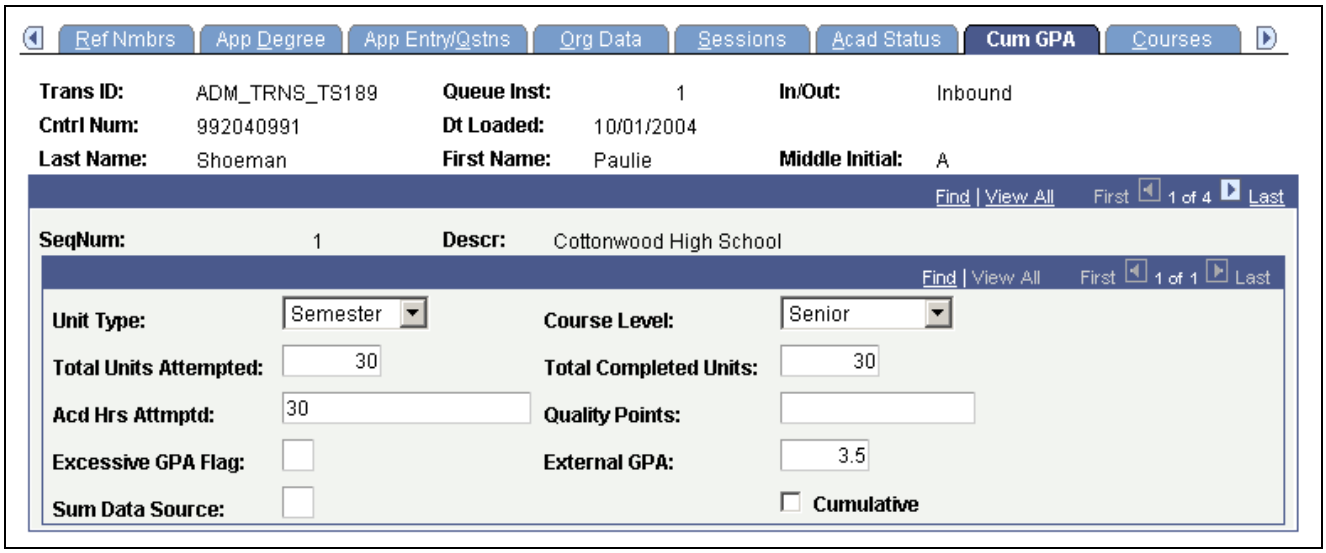
Yes/No Indicates whether the applicant answered the question yes or no. The possible values are *N* (no), *U* (unknown), *W* (not applicable), and *Y* (yes).

Descr 1 (description 1) A free-form question or indicator for a mutually defined question when the codified questions are not adequate.

Descr 2 (description 2) The free form or fill-in-the blank response to the question when such a response is needed. Some questions require that an explanatory note accompany an answer (such as, "Have you ever been convicted of a crime?")

Reviewing TS189 Staging Cumulative GPA Data

Access the Cum GPA (cumulative grade point average) page.



TS189 Staging - Cum GPA page

Acd Hrs Attmptd (academic hours attempted) The number of academic hours the person attempted.

Quality Points The quality points used to compute the person's GPA.

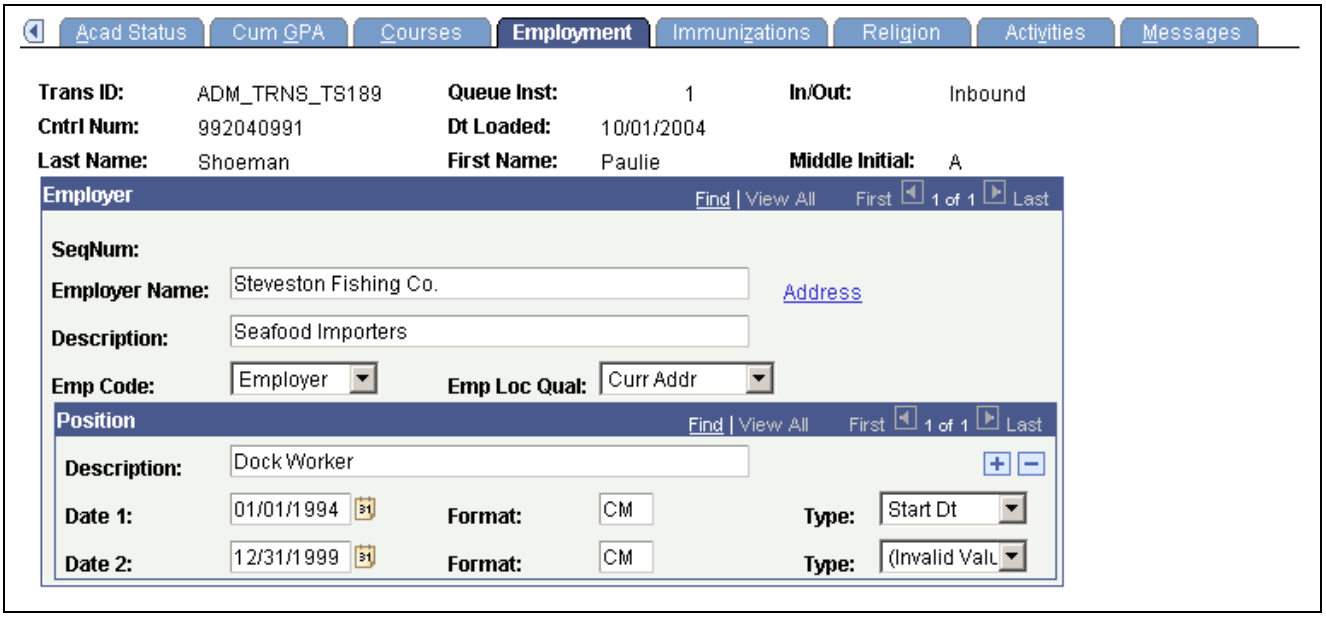
Excessive GPA Flag Indicates that an A+ grade has a value higher than the highest possible GPA.

Sum Data Source (summary data source) A code used to indicate the source of the summary data. The possibilities are *A* (self-reported) and *D* (college transcript).

Cum Summary (cumulative summary) Indicates whether the summary is cumulative.

Reviewing TS189 Staging Employment Data

Access the Employment page.



TS189 Staging - Employment page

The Employer

Emp Code (employer code) The employer code. Values for this field are delivered with your system as translate values. You can modify these translate values. The possibilities are *Employer* or *Mutually.*

Emp Loc Qual (employer location qualifier) Defines the address type: home address, current address, local address, and so on.

The Position

Date 1 and **Date 2** The dates that the action in the Type field occurred. In the example in the preceding page shot, the start date of the position was January 1, 2000.

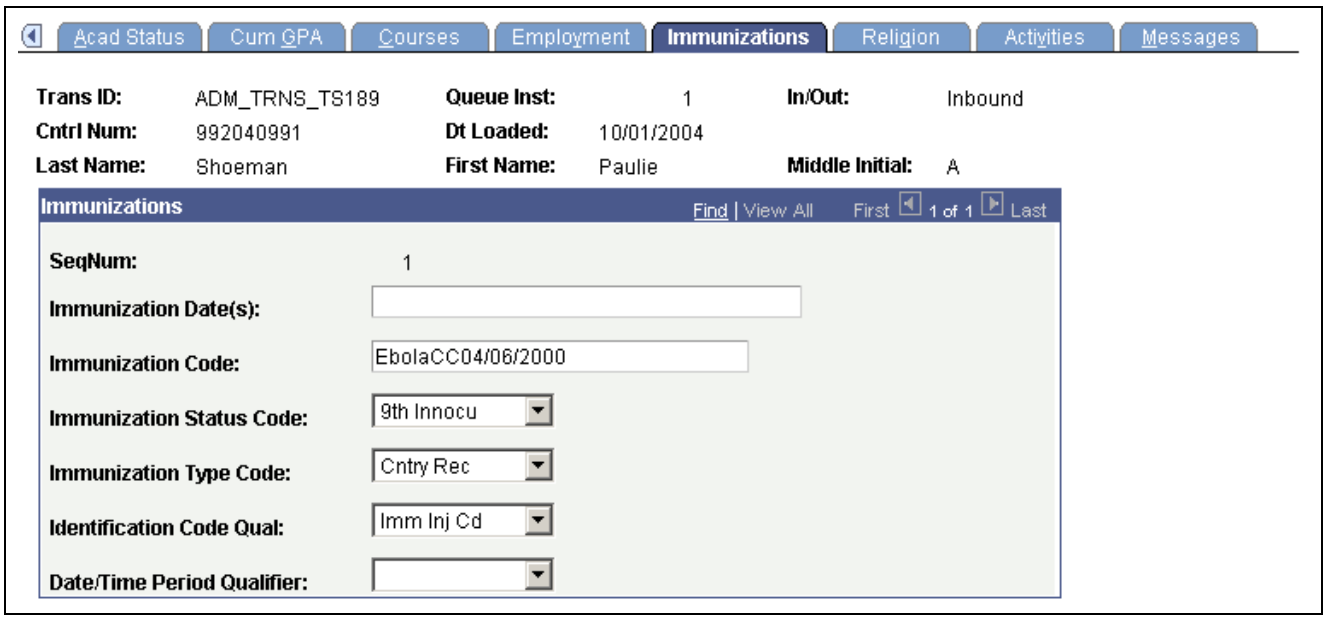
Format Defines the units in which the date is defined. For example, if the date is set at *CCYYMM,* then data represented as 01/01/2000 would be transmitted as 000101: century, year, month.

Type Specifies whether the date represents the starting date or the ending date.

Address Click to access address information for this employer. The Address Detail page appears.

Reviewing TS189 Staging Immunizations Data

Access the Immunizations page.



TS189 Staging - Immunizations page

Note. Immunization data does not post to the PeopleSoft Immunization Table.

Immunization Date(s) The date(s) that the immunization occurred.

Immunization Code The type of immunization a person received. The following table contains possible codes defined by the Postsecondary Electronic Standards Council. Some possible codes are:

Immunization Code	Description
V03.2	Vaccine for Tuberculosis
V03.6	Vaccine for Pertussis
V03.7	Tetanus Toxoid Inoculation
V04.01	Polio Oral
V04.02	Polio Immunization
V04.1	Vaccine for Smallpox
V04.2	Vaccine for Measles

Immunization Code	Description
V04.3	Vaccine for Rubella
V04.6	Vaccine for Mumps
V04.8	Vaccine for Influenza
V06.1	Vaccine for DTP
V06.12	TD

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council Website.

Immunization Status Code Indicates the status of an immunization conducted on a person. Possible codes are:

Code	Name
1	First Inoculation
2	Second Inoculation
3	Third Inoculation
4	Fourth Inoculation
5	Fifth Inoculation
6	Sixth Inoculation
7	Seventh Inoculation
8	Eighth Inoculation
9	Ninth Inoculation
10	Medical Exemption
11	Personal Exemption

Code	Name
12	Religious Exemption
13	Had the Disease
14	Has Not Had the Disease

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council Website.

Immunization Type Code Indicates the title or contents of a document, report, or supporting item. Some possible codes are:

Code	Description
CQ	County Record
HR	Health Clinic Records
IR	State School Immunization Records
MG	Migrant Student Records Transfer System (MSRTS) Record
PY	Physician's Report
ZZ	Mutually Defined

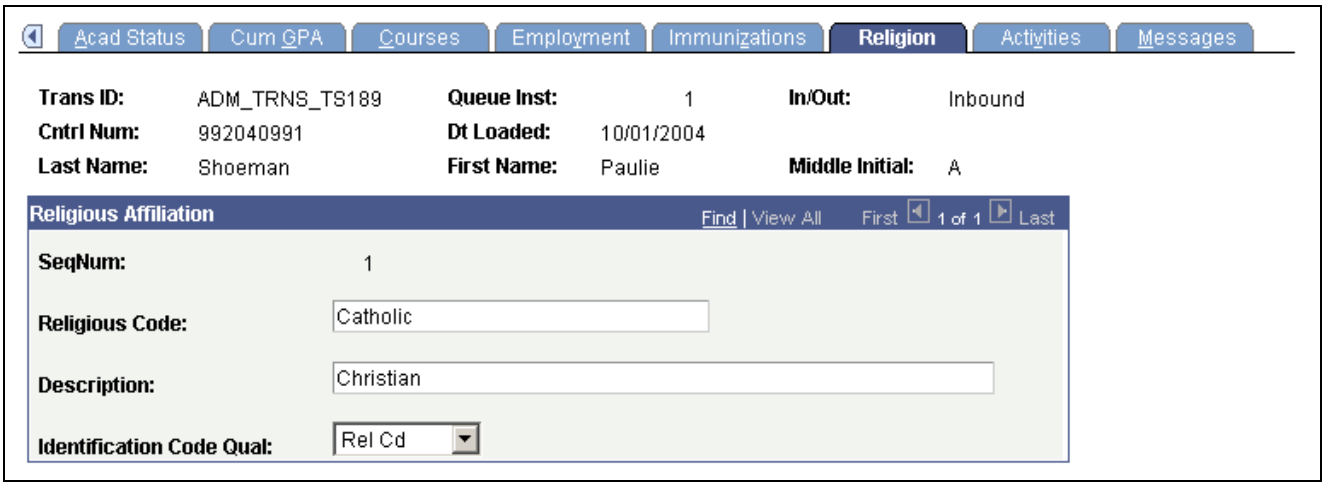
This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council Website.

Identification Code Qual (identification code qualifier) Identifies a specific industry code list, such as *AAW* (Immunization Injection Code).

Date/Time Period Qualifier Defines the units in which the Immunization Date(s) field is defined. For example, if the Date/Time Period Qualifier field is set at *MMDDCCYY,* then data represented as 04/06/2000 would be transmitted as 04062000.

Reviewing TS189 Staging Religion Data

Access the Religion page.



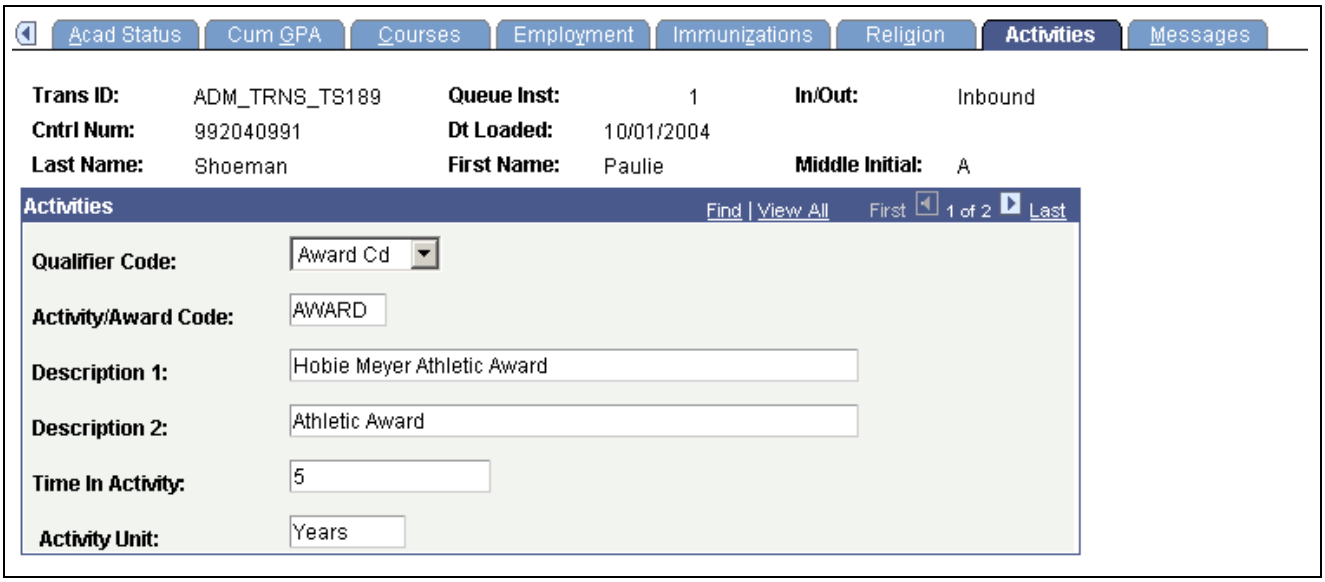
TS189 Staging - Religion page

Identification Code Qual Identifies a specific industry code list, such as *REL Cd* (religion code).

Note. Religion data does not post to the PeopleSoft Religious Preferences Table.

Reviewing TS189 Staging Activities Data

Access the Activities page.



TS189 Staging - Activities page

Qualifier Code Identifies a specific industry code list, such as *Award Cd* (award code).

Searching for Matching Organization Data

After you have loaded the application data into the staging files, you perform an organization search step. You must do the organization search because the TS189 load contains organization data—course information associated with a particular organization—that must be related to some record in your database.

This section discusses how to search for matching organization data.

Page Used to Search for Matching Organization Data

Page Name	Object Name	Navigation	Usage
EDI TS189 Org Search (EDI TS189 organization search)	ADM_TS189_ORG_PARM	Student Admissions, Application/Transcript Loads, TS189, Organization Search Process	Perform the organization search.

Using the EDI TS189 Organization Search Page

Access the EDI TS189 Org Search page.

Click the Run button to run the EDI TS189 App Org Search process at user-defined intervals.

Setting Up TS189 Search/Match/Post Parameters, Processing, and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search/Match Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the TS189 data and then you can run both processes at once: to search for matching people in your database and to post the external TS189 data according to the parameters you set up.

Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the TS189 data to the database in one step.

To set up TS189 search/match/post parameters, process, and post the staging files:

- Set up the TS189 search/match parameters.
- Setting post parameters for TS189 external data.
- Setting additional post parameters for TS189 external data and posting the data.

Pages Used to Set Up TS189 Search/Match/Post Parameters, Process, and Post EDI Staging Files

Page Name	Object Name	Navigation	Usage
Post Parameters	ADM_TS189_PST_PARM	Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process	Post TS189 application data. You can post a single record or all records in the staging table.
Post Parameters 2	ADM_TS189_PST_PRM2	Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Post Parameters 2	Enter additional run control defaults, such as contact type, external career, summary type, and material group information.

Setting Up the EDI TS189 Search/Match Parameters

Use the Search/Match Parameters page to set up your search/match parameters for processing the EDI TS189 application staging table.

Select Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Search/Match Parameters.

See Also

Chapter 15, “Performing EDI TS130 Transcript Transactions,” Setting Up Search/Match Parameters, page 245

Setting Post Parameters for EDI TS189 External Data

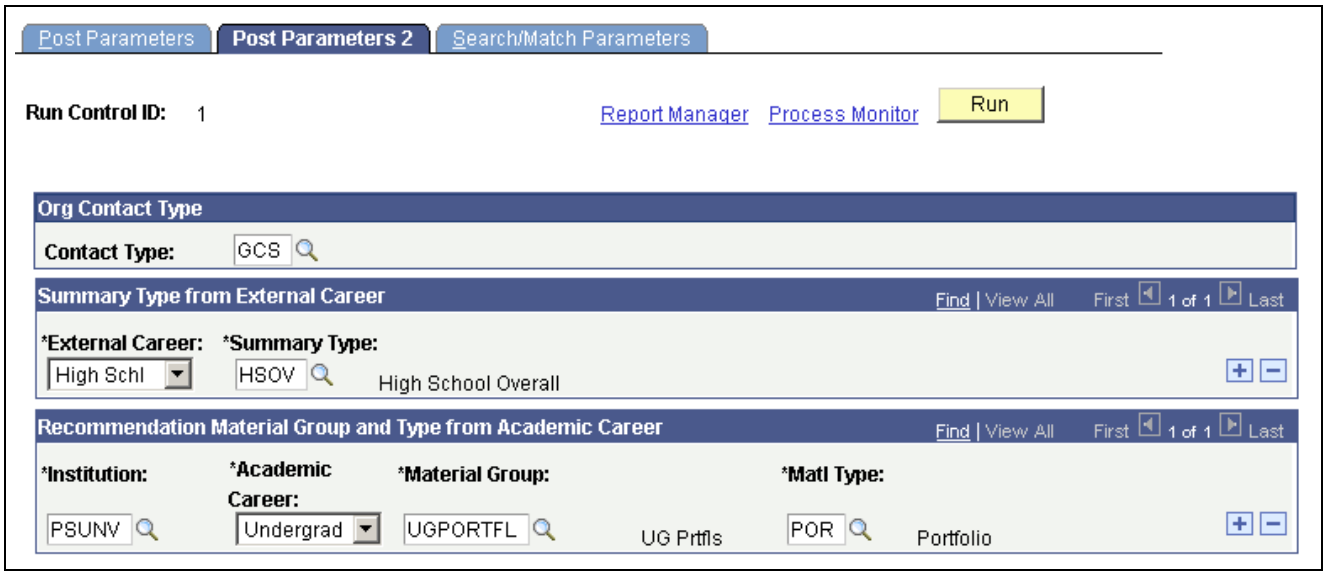
Access the Post Parameters page. Use the Post Parameters page to post EDI TS189 application data. You can post a single record or all records in the staging table.

See Also

Chapter 15, “Performing EDI TS130 Transcript Transactions,” Posting the EDI TS130 External Data, page 246

Setting Additional Post Parameters for EDI TS189 External Data

Access the Post Parameters 2 page.



Post Parameters 2 page

Contact Type Select the contact type to enable the posting of new organization and organization contact information that is loaded with the TS189 file.

External Career and **Summary Type** These are cross reference fields that work in conjunction with external academic summary data from incoming applications. The two fields enable the posting of external GPAs to students' external education records (external GPA is tied to summary type, which is a child of external career). External career data is loaded with the TS189 file. By defining desired summary types for each external career that has been loaded, the TS189 PeopleSearch/Post process writes external career, summary type, and external GPA data to the external education record.

Institution, Academic Career, Material Group, and **Matl Type** (material type) These fields enable the posting of recommendation material group information. Select material groups that represent recommendations and the recommendation material type. Recommendation material group information gets posted to the general materials page. Define material groups on the Material Group Table page.

Purging the TS189 Staging Table and Messages

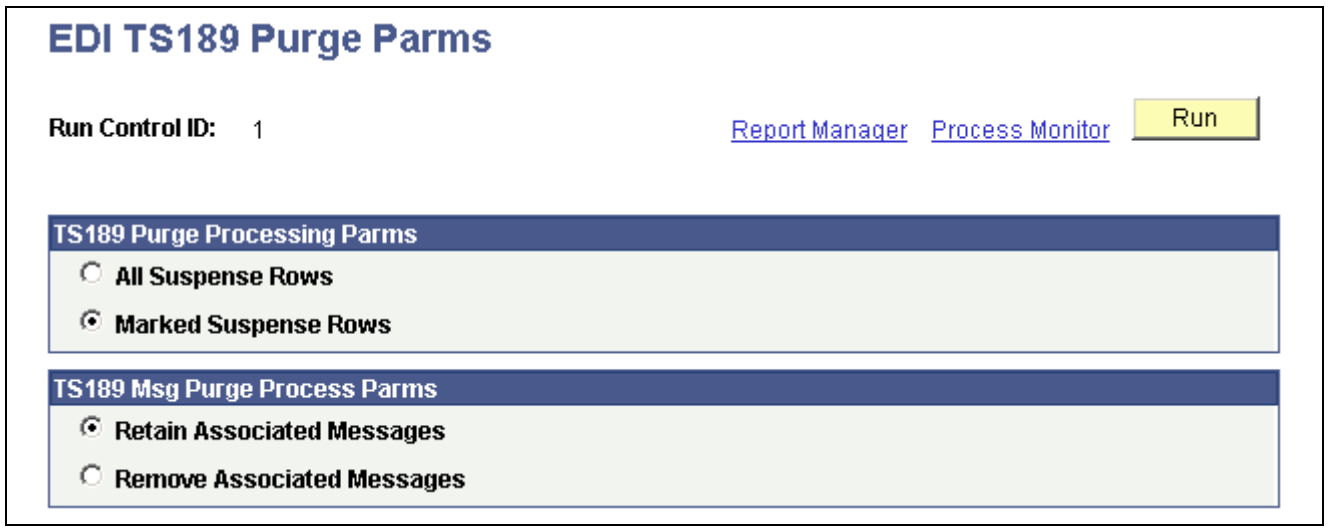
This section discusses how to use the EDI TS189 Purge Parms (EDI TS189 purge parameters) page to purge records and messages, if applicable, from the EDI TS189 staging table.

Page Used to Purge the EDI TS189 Staging Table and Messages

Page Name	Object Name	Navigation	Usage
EDI TS189 Purge Parms (EDI TS189 purge parameters)	ADM_TS189_PUR_PARM	Student Admissions, Application/Transcript Loads, TS189, Purge Process	Purge records and messages, if applicable, from the TS189 staging table.

Purging the EDI TS189 Staging Table and Messages

Access the EDI TS189 Purge Parms page.



EDI TS189 Purge Parms page

The EDI TS189 Purge Processing Parameters

All Suspense Rows Select this option if you want to purge all records in your staging table, regardless of what is in the Post field on the Process Options and Org Process Options pages.

Marked Test Suspense Rows Select this option if you want to purge only those records in your staging table marked *Purge* on the Post field on the Process Options and Org Process Options pages.

The EDI TS189 Message Purge Processing Parameters

Retain Associated Messages Select this option if you do not want to purge messages associated with the files that you're purging.

Remove Associated Messages Select this option if you want to purge messages associated with the files that you're purging.

Click the Run button to run the EDI TS189 Application Purge process at user-defined intervals.

CHAPTER 17

Processing External Test Scores

This chapter provides overviews and discusses how to:

- Load external test score files.
- Correct and edit data in the suspense record.
- Perform search/match and post external data.
- Enter optional criteria for creating prospects.
- Research duplicate records.
- Re-run the search/match/post process.
- Purge suspense files and test score messages.
- Review additional external test data.
- View test score messages summary information.

Understanding How to Process External Test Score Data

The ability to receive external test score data and post it to your database is integral to recruiting and evaluating applicants. Academic institutions receive hundreds if not thousands of test scores per year. Using your PeopleSoft Recruiting and Admissions application, you can receive external test score data, review the data for errors, and post the data, confident that you are not creating duplicate IDs.

PeopleSoft Recruiting and Admissions supports loading many test scores, such as ACT, ADA, AMCAS, AP, CRS, DAT, EOS, GMASS, GMAT, GRE, LSAT/LSDAS, SAT, SSS and TOEFL. The ultimate goal in processing external test score data is to update test score data for individuals through electronic data loads. Your institution receives tapes that contain scores, bio/demo, and sometimes transcript data for individuals. For each test, you first load the data into suspense tables. Then, you ensure that you are not going to create any duplicate bio/demo or test records—it's very hard to identify and correct duplicate records after they've been created. Finally, you post the bio/demo and test score data to your database—the search/match/post process posts self reported academic information to test score candidate data tables. You follow this process for each test.

Regardless of the test, the same components are used to load, view and post test score data. The ID of the test you are processing must be entered on each component. The entry of the test ID determines which fields appear on each page. The test IDs shown in the prompt are based on your test ID security. You must have test ID security defined in order to process external test scores.

To Process External Test Score Data:

1. Load the test score data from a file in your directory into a suspense table using the external test score load process.
2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter the test ID, *Error* in the Edit Processing Option field and click the Search button. Go into each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error)* in the Edit field on the Test Score Suspense Data page.

3. After you have corrected all of the load errors, run the search/match/post process.

   This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, that can include name, social security number, birth date, and so forth) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process will not post the record until you can manually determine which records are truly duplicates. You can also choose to create prospect records and assign 3Cs during the post process.

4. Go into each suspense record that did not get posted and check to see if it is truly a duplicate.

   In the search dialog page of the suspense component, enter the test ID, *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you are in the component, find the parameters for which the process identified a match, then use Search Match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who truly matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the search/match/post process again.

   The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Student Recruiting, External Test Score Processing, Add/Update a Person or Student Admissions, External Test Score Processing , Add/Update a Person. To view a test score record that the search/match/post process created or updated, select Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results.

6. Purge the suspense tables.

   We recommend that you purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps you to avoid confusion the next time you load data into the suspense tables.

7. Review Test Score Candidate Data, if desired.

   When external test score loads contain additional information about the student such as academic interests, extracurricular activities and prior schools attended, the search/match/post process stores the data in the Test Score Candidate Data component.

8. Create Prospects from Tests, if desired. Create prospects from posted test scores using query manager to define a specific population.

   See Chapter 9, “Recruiting Prospective Students,” Understanding Creating Prospects from Test Scores with Query, page 98.

9. Create Applicants from Test, if desired. Create applications for posted ADA, AMCAS or LSAT/LSDAS tests.

   See Chapter 14, “Adding and Updating Applications,” Pages Used to Create Applications from External Test Score Data, page 197.

See Also

Chapter 17, "Processing External Test Scores," Reviewing Test Score Candidate Data, page 301

Loading External Test Score Files

To run an external test score load process, you must enter the directory path where the test data file is located (such as \\network\test files\ACT_1.dat). The process loads the data from the file into suspense tables.

Prerequisites

Before you load external test scores, you must:

1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure the Ethnic Group Mapping page.

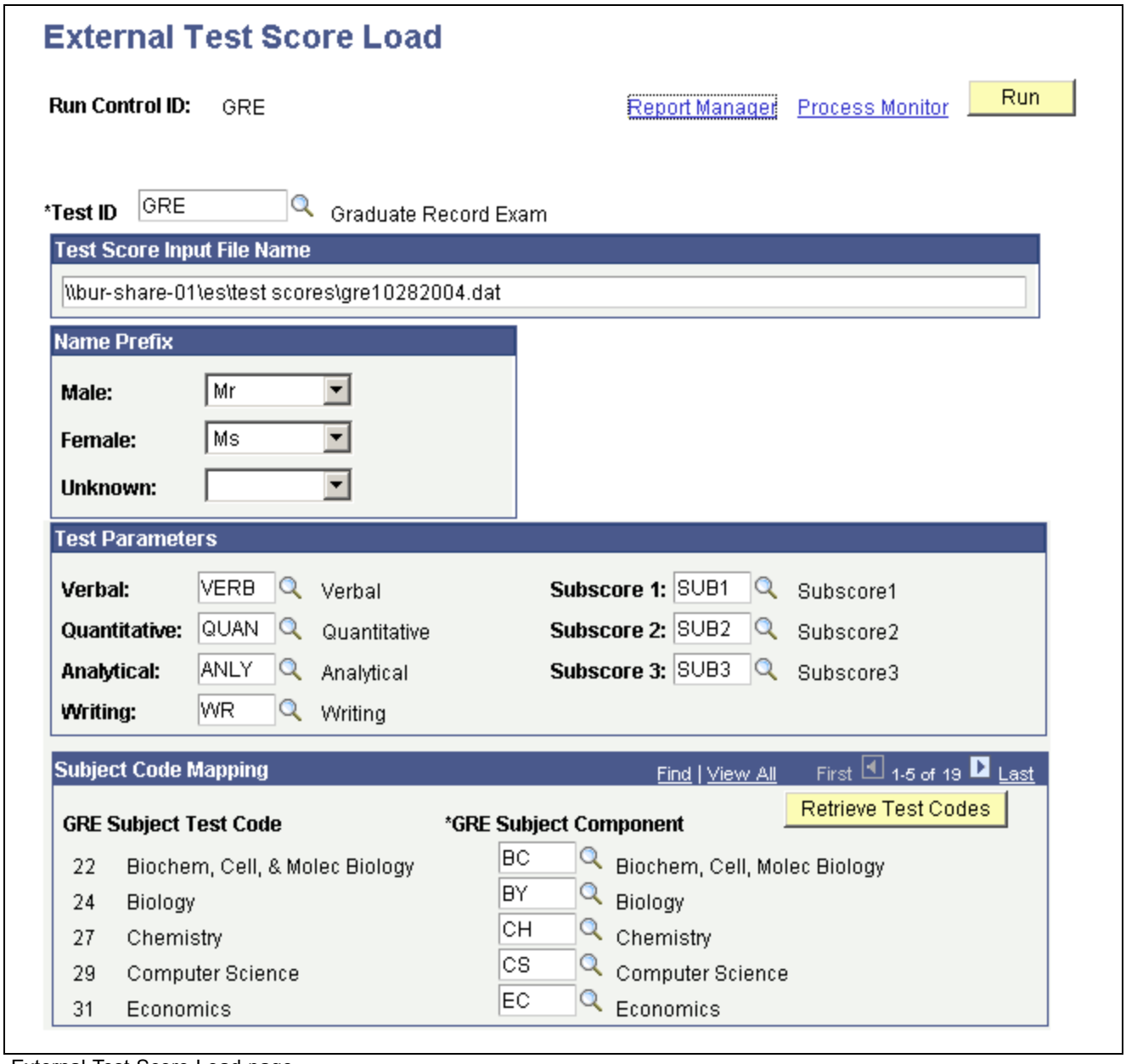
See Chapter 14, "Adding and Updating Applications," Pages Used to Create Applications from External Test Score Data, page 197.

Page Used to Load External Test Score Files

Page Name	Object Name	Navigation	Usage
External Test Score Load	SAD_TEST_LOAD	• Student Recruiting, External Test Score Processing, External Test Score Load • or Student Admissions, External Test Score Processing, External Test Score Load	Designate the directory location of the test scores that you are loading and enter the load parameters for that test. **Note.** We recommend that you complete the full loading, search/match and posting process before loading a new set of data. If you have test scores waiting to be processed, such as ACT test scores, do not load a new ACT test score file until you have processed the data in your ACT suspense files.

Setting Up Load Parameters and Loading the File

Access the External Test Score Load page.



External Test Score Load page

Test ID

Test ID

Select the test that you want to load. Define test ID values on the Test Tables page. Once the Test ID is entered, the additional fields specific to the test will display. You must have Test ID Security established in order to select a value. This field is required.

Test Score File Name and Path

Test ScoreFile Name and Path

Enter the path of the directory and file where the test data resides. This field is required.

For the ADA test only: in the AADSAS field, enter the name of the directory and file where the AADSAS data resides. This is the bio/demo and test score

data. In the AADSAS (Crs) field, enter the name of the directory and file where the AADSAS course data resides. This is course data only and is linked to the matching person's test score record.

Name Prefix

Male, Female, and **Unknown** — Test score loads do not include name prefixes. They do, however, include gender. Enter the prefix according to the gender provided in the test data load. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Dr, Miss, Mr, Mrs,* and *Ms.*

Test Parameters

The test components are displayed based on the test ID entered. For example, ACT has seven components as part of their test but LSAT only reports one component. After the Test ID field is populated, enter the test component corresponding to each test parameter listed. The prompt in test parameters will only display the test components for the Test ID. Test Components are mapped to the Test ID on the Test Table page. You may leave these fields blank for EOS, GMASS and SSS. The Test components must be entered for all other tests.

See Chapter 5, "Setting Up External Test Score Loads," page 45.

Score and **Percentile** — For EOS, GMASS, and SSS only: For each test component, enter the score and percentile that you want to appear for all of the EOS, GMASS, and SSS records that you load. EOS, GMASS, and SSS are search tapes and do not deliver test scores. If you used test scores or percentiles as part of your criteria when purchasing the search tape, you have the option of entering that information on the page. The scores and percentiles will be posted for each person on the search tape. You may leave these fields blank.

Mapping Additional Test Codes

For AP, GRE, SAT and SSS Only: These tests require that you map additional test codes for the test. To begin, click the button to retrieve the test codes for the test ID. The left column is the delivered test code. This is the code that the testing organization defines. (To view the delivered codes, select Setup SA CR, Product Related, Recruiting and Admissions, External Test Scores, then choose the component that you want to review.) The right column is the corresponding component that you defined on the Test Component page and mapped to the test ID on Test Table page. Select the test component that corresponds to the delivered test code.

Other Parameters

Test Date, Test Day, Test Month, Degree Day, Graduation Day and Graduation Month — The PeopleSoft date format requires a day, month, and year. If the date format for a test omits one of these numbers, the system asks you to enter the numeric value for the missing number (such as day, month, or graduation day) that you want the load process to use when it converts the date to the PeopleSoft date format. This also allows the program to populate the Degree Date and Graduation Date information to the prospect record if you select the Create Prospect field on the Search/Match/Post Test Scores page. Your valid options for Test Day, Degree Day and Graduation Day are *1* through *28.* The valid options for Test Month and Graduation Month are 1 through 12.

LSAT/LSDAS Test Score — For LSAT/LSDAS only: Select *LSAT* or *LSDAS* to indicate the type of file that you are loading.

Score/Test Type	For ADA only: Select USA or CAN to indicate if the test is administered for the United States or Canada. The test components on the page will change based on the option selected.
SAT I Search, PSAT/NMSQT Search, or **AP Search**	For SSS only: Your institution can buy the names of students who have either taken the SAT I, PSAT/NMSQT, or AP exams. Select the search tape that you are loading. The format of the file varies according to the test that you are loading.
School Tape Type	For SAT only: Select the type of file that you're loading: *College* or *Secondary.* The default is College. The format of the file varies between the two school tape types.
Initial or **Full**	For DAT only: Select one of these options to determine whether to have the system load the student's middle name initial or the full middle name. The default setting is to load the middle initial.

Correcting and Editing Data in the Suspense Record

Use the suspense component to correct processing errors after the external test score load.

Understanding, Correcting, and Editing Suspense Data

Edit information in the suspense record. However, remember that the search/match/post process only posts bio/demo data and test score data to your database. The system stores additional data that the test loads contain in the Test Score Candidate Data component. This data does not affect other tables in your database.

Before entering the External Test Score Suspense component, you must enter the Test ID and at least one other search criteria. The pages in the component dynamically display based on the Test ID entered. The pages in the component are very similar in the way they look and work. For example, every suspense component has a Personal Information page and a Tests page. In addition, they all share the first page — Test Score Suspense Data. Some testing agencies ask questions about college preferences, high school activities, and transcript information. Independent of the testing agency, core and supplemental data are handled similarly within the system.

Much of the data that is loaded into the suspense record is data the person entered when completing the student profile section of the test. If the person left out information, or did not complete the entire section, there will be empty fields in the suspense component.

Many of the values and codes that appear in the suspense component are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer the test score layouts you receive from the testing agency.

Correcting Load Errors

An error is indicated on the External Test Score Suspense component when certain values are missing or invalid. You will see an error flag for First Name or Last Name if the value is not populated. In addition an error flag will appear for the following data if it is invalid for the test ID entered: Birthdate, Graduation Date, Test Date, Test Component, Country, Subject Test Code and Degree Date. An invalid test score is a score that is outside the valid test score range according to the ranges that you defined on the Test Table page. The program validates the country for every test where a country code is received. The country code is validated against the PS Country table with the exception of GMAT and ADA which have their own country mapping tables. Find the field that contains the missing value and enter a valid value. You can find the First Name, Last Name, and Birthdate fields on the Personal Information page, and the Test Date and Test Component fields on the Tests page. For other error indicators, look through the suspense component to find the corresponding field and enter a valid value.

After you enter a valid value for the fields that were missing or incorrect, save the component. The Edit field on the Process Options page should now display *Complete.* Be sure to correct all errors before posting the data.

Note. Data in suspense tables does not affect tables in your database until you post the data by running the search/match/post process. In addition, if you find an error in the suspense component after you run the search/match/post process, you would need to go to the proper page in your database to make any changes. For example, if you found an error on the Personal Information page in the suspense component, you would need to go to the Add/Update a Person component in the External Test Score Processing menu for this person to correct the error.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

Pages Used to Correct and Edit Data in the Suspense Record

Page Name	Object Name	Navigation	Usage
Test Score Suspense Data	SAD_SUSP_PROC_OPTN	• Student Recruiting, External Test Score Processing, External Test Score Suspense • Student Admissions, External Test Score Processing, External Test Score Suspense	View and correct load process results and test score messages. This page will appear for every test ID.

Page Name	Object Name	Navigation	Usage
Personal Information	SAD_ACT_SUS_BIO, SAD_ADA_SUS_BIO, SAD_AMC_SUS_BIO, SAD_AP_SUS_BIO, SAD_CRS_SUS_BIO, SAD_DAT_SUS_BIO, SAD_EOS_SUS_BIO, SAD_GMS_SUS_BIO, SAD_GMT_SUS_BIO, SAD_GRE_SUS_BIO, SAD_LAW_SUS_BIO, SAD_SAT_SUS_BIO, SAD_SSS_SUS_BIO, SAD_TFL_SUS_BIO	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Personal Information • Student Admissions, External Test Score Processing, External Test Score Suspense, Personal Information	Review and edit the student's personal information in the suspense record. Refer to the data layouts from the testing agency to determine the fields that will display. Each test has a Personal Information page. The data will vary depending on the test ID.
Tests	SAD_ACT_SUS_TST, SAD_ADA_SUS_TST, SAD_AMC_SUS_TST, SAD_AP_SUS_TST, SAD_CRS_SUS_TST, SAD_DAT_SUS_TST, SAD_EOS_SUS_TST, SAD_GMS_SUS_TST, SAD_GMT_SUS_TST, SAD_GRE_SUS_TST, SAD_LAW_SUS_TST, SAD_SSS_SUS_TST, SAD_TFL_SUS_TST	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Tests • Student Admissions, External Test Score Processing, External Test Score Suspense, Tests	Review or edit test data in the suspense record. Some of the information on this page is required (such as test date and test components). If this information is missing in the external test data load, you will have to enter valid values here before posting the record. Refer to the data layouts from the testing agency to determine the fields that will display. Each test has a Tests page with the exception of SAT. The data will vary depending on the test ID.
Academics	SAD_ACT_SUS_SPS	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Academics • Student Admissions, External Test Score Processing, External Test Score Suspense, Academics	For ACT only. Review or edit academic data in the suspense record. Refer to the data layouts from ACT to determine the fields that will display.
Activities	SAD_ACT_SUS_COL	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Activities • Student Admissions, External Test Score Processing, External Test Score Suspense, Activities	For ACT only: Review and edit activity information in the suspense record. Refer to the data layouts from ACT to determine the fields that will display.

Page Name	Object Name	Navigation	Usage
Interests	SAD_ACT_SUS_INT	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Interests • Student Admissions, External Test Score Processing, External Test Score Suspense, Interests	For ACT only. Review and edit interest data in the suspense record. Refer to the data layouts from ACT to determine the fields that will display.
Education	SAD_ADA_SUS_OTH	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Education • Student Admissions, External Test Score Processing, External Test Score Suspense, Education	For ADA only. Review and edit education data in the suspense record. Refer to the data layouts from AADSAS (Associated American Dental Schools Application Service) to determine the fields that will display.
Courses	SAD_ADA_SUS_CRS	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Courses • Student Admissions, External Test Score Processing, External Test Score Suspense, Courses	For ADA only. Review and edit course detail information in the suspense file. Refer to the data layouts from AADSAS to determine the fields that will display.
Applicant Data	SAD_ADA_SUS_ADDL, SAD_AMC_SUS_OTH	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Applicant Data • Student Admissions, External Test Score Processing, External Test Score Suspense, Applicant Data	For ADA only. Review and edit applicant data in the suspense record. Refer to the data layouts from AADSAS to determine the fields that will display.
Colleges	SAD_AMC_SUS_COL	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Colleges • Student Admissions, External Test Score Processing, External Test Score Suspense, Colleges	For AMCAS only. Review and edit college data in the suspense record. Refer to the data layouts from AAMC (American Association of Medical Colleges) to determine the fields that will display.

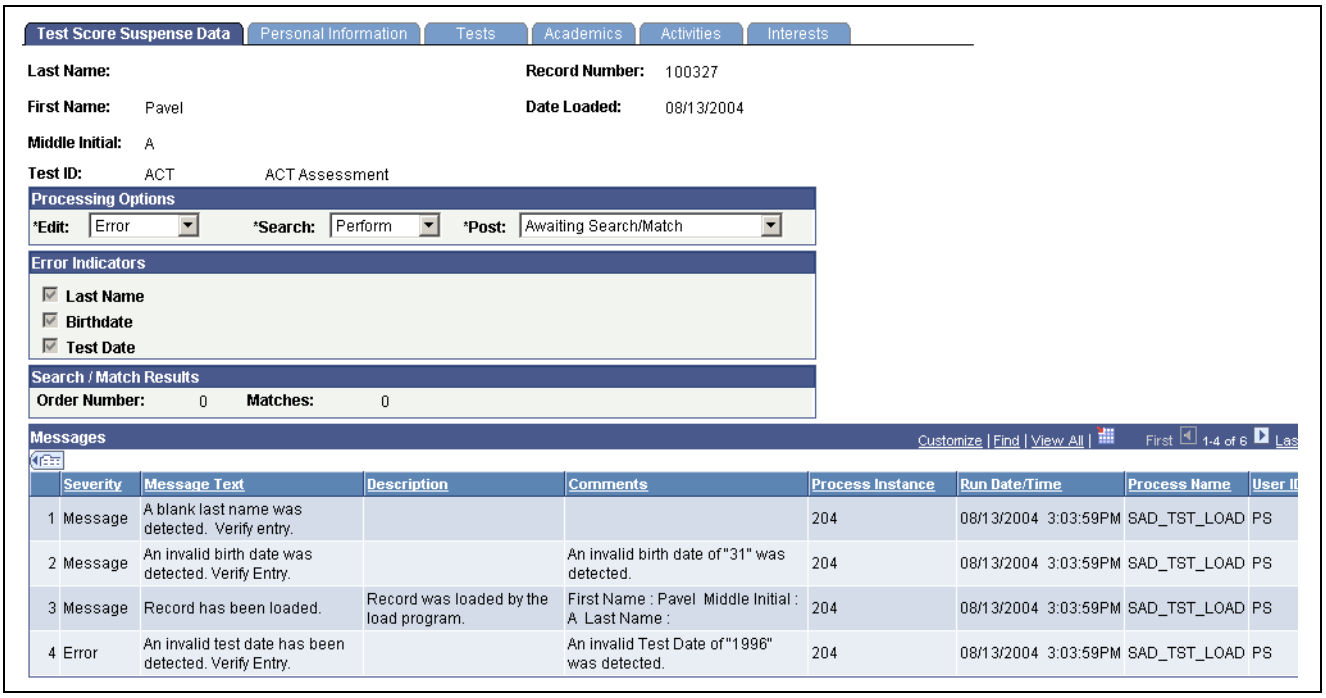
Page Name	Object Name	Navigation	Usage
GPA/Hours	SAD_AMC_SUS_GPA	• Student Recruiting, External Test Score Processing, External Test Score Suspense, GPA/Hours • Student Admissions, External Test Score Processing, External Test Score Suspense, GPA/Hours	For AMCAS only. Review and edit undergraduate education data in the suspense record. Refer to the data layouts from AAMC to determine the fields that will display.
Schools	SAD_AP_SUS_SCH	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Schools • Student Admissions, External Test Score Processing, External Test Score Suspense, Schools	For AP only. Use the Schools page to review and edit school data in the suspense record. Refer to the data layouts from ETS (Educational Testing Service) to determine the fields that will display.
Awards	SAD_AP_SUS_PREV, SAD_SSS_SUSP_SDQ	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Awards • Student Admissions, External Test Score Processing, External Test Score Suspense, Awards	For AP and SSS only: Review and edit additional question information in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.
Additional Information	SAD_CRS_SUS_ACI	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Additional Information • Student Admissions, External Test Score Processing, External Test Score Suspense, Additional Information	For CRS only. Review and edit additional information in the suspense record. Refer to the data layouts from LSAC (Law School Admission Council) to determine the fields that will display.
Profile Data	SAD_GRE_SUS_PRFL	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Profile Data • Student Admissions, External Test Score Processing, External Test Score Suspense, Profile Data	For GRE only. Review and edit profile data in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.

Page Name	Object Name	Navigation	Usage
Prior Schools	SAD_LAW_SUS_MTR	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Prior Schools • Student Admissions, External Test Score Processing, External Test Score Suspense, Prior Schools	For LSAT/LSDAS only. Review and edit prior schools attended in the suspense record. Refer to the data layouts from LSAC to determine the fields that will display.
Candidate Data	SAD_LAW_SUS_ACI	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Candidate Data • Student Admissions, External Test Score Processing, External Test Score Suspense, Candidate Data	For LSAT/LSDAS only. Review and edit candidate data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will display.
Recommendations	SAD_LAW_SUS_REC	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Recommendations • Student Admissions, External Test Score Processing, External Test Score Suspense, Recommendations	For LSAT/LSDAS only. Review and edit recommendation data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will display.
Academics	SAD_LAW_SUS_SCH	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Academics • Student Admissions, External Test Score Processing, External Test Score Suspense, Academics	For LSAT/LSDAS only. Review and edit academic data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will display.
SAT I	SAD_SAT_SUS_SATI	• Student Recruiting, External Test Score Processing, External Test Score Suspense, SAT I • Student Admissions, External Test Score Processing, External Test Score Suspense, SAT I	For SAT only. Review and edit SAT I data in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.

Page Name	Object Name	Navigation	Usage
SAT II	SAD_SAT_SUS_SATII	• Student Recruiting, External Test Score Processing, External Test Score Suspense, SAT II • Student Admissions, External Test Score Processing, External Test Score Suspense, SAT II	For SAT only. Review and edit SAT II data in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.
Student Data	SAD_SAT_SUS_SDQ, SAD_SSS_SUS_SDQ	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Student Data • Student Admissions, External Test Score Processing, External Test Score Suspense, Student Data	For SAT and SSS only. Review and edit student data in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.
School Data	SAD_SAT_SUS_SDQ2	• Student Recruiting, External Test Score Processing, External Test Score Suspense, School Data • Student Admissions, External Test Score Processing, External Test Score Suspense, School Data	For SAT only. Review and edit school data in the suspense record. Refer to the data layouts from ETS to determine the fields that will display.

Reviewing Test Score Suspense Data

Access the Test Score Suspense Data page.



Test Score Suspense Data page

This page provides the status of a suspense record regarding the loading, search/match and posting processes.

Any informational and error messages that external test data load and search/match/post processes generate appear on this page. You can use this page to keep current on the status of an individual's test score processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your test score processing. To do so, you would need to wait to purge your test score messages until you have completed your analysis.

Processing Options

Edit

Displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the test score data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the test score data. The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete.*

Perform: You set this value manually. This is for informational purposes only.

Search

Displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process completed successfully.

Error: The search/match process encountered problems. Refer to the log file for information regarding the error.

Perform: The search/match process will process this record the next time you run the process.

Post Displays the status of the record regarding the search/match/post process. These values can be entered manually; however, some are entered by the system after processes are run as described in the table below. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/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 to your database when you run the search/match/post process. When set manually, means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Personal Information page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

Post Value	Meaning	How Set
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually, means that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Personal Information page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Awaiting Search/Match	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Last Name, Test Date, Birth Day, First Name, Graduation Date, High School Graduation Date, Test Component

When a load error occurs, the load external data process displays the required values that were missing or incorrect in the load. Go to the Personal Information page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box and the fields will no longer display. After all of the check boxes are cleared and the component is saved, the system enters *Complete* in the Edit field.

Search/Match Results

Order Number

You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide for yourself whether or not a possible duplication exists.

Matches

Displays the number of matches the process found at order number given.

Messages

Message Severity

The message severity, such as *Message* or *Error.*

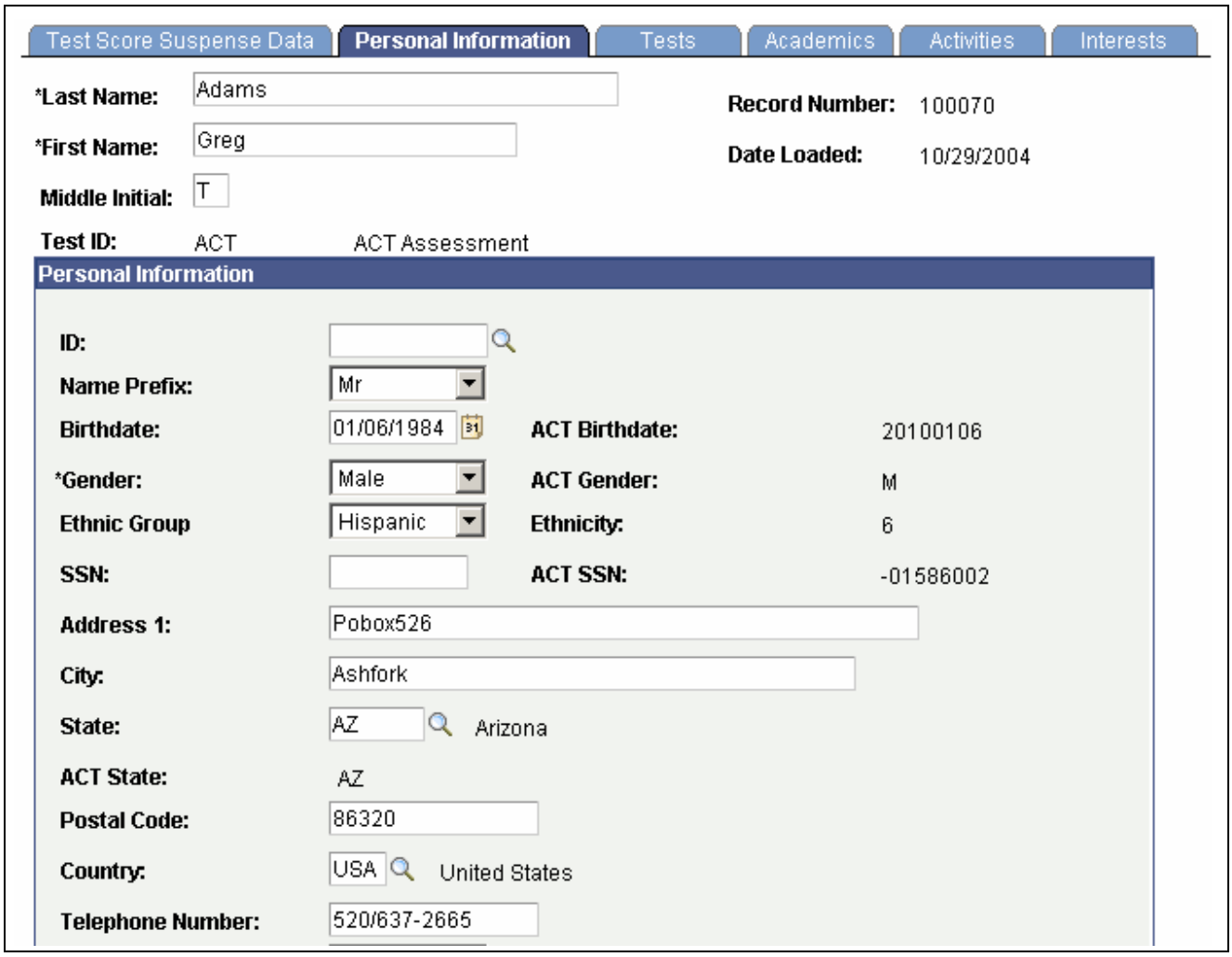
Message Text

The message on this row of data.

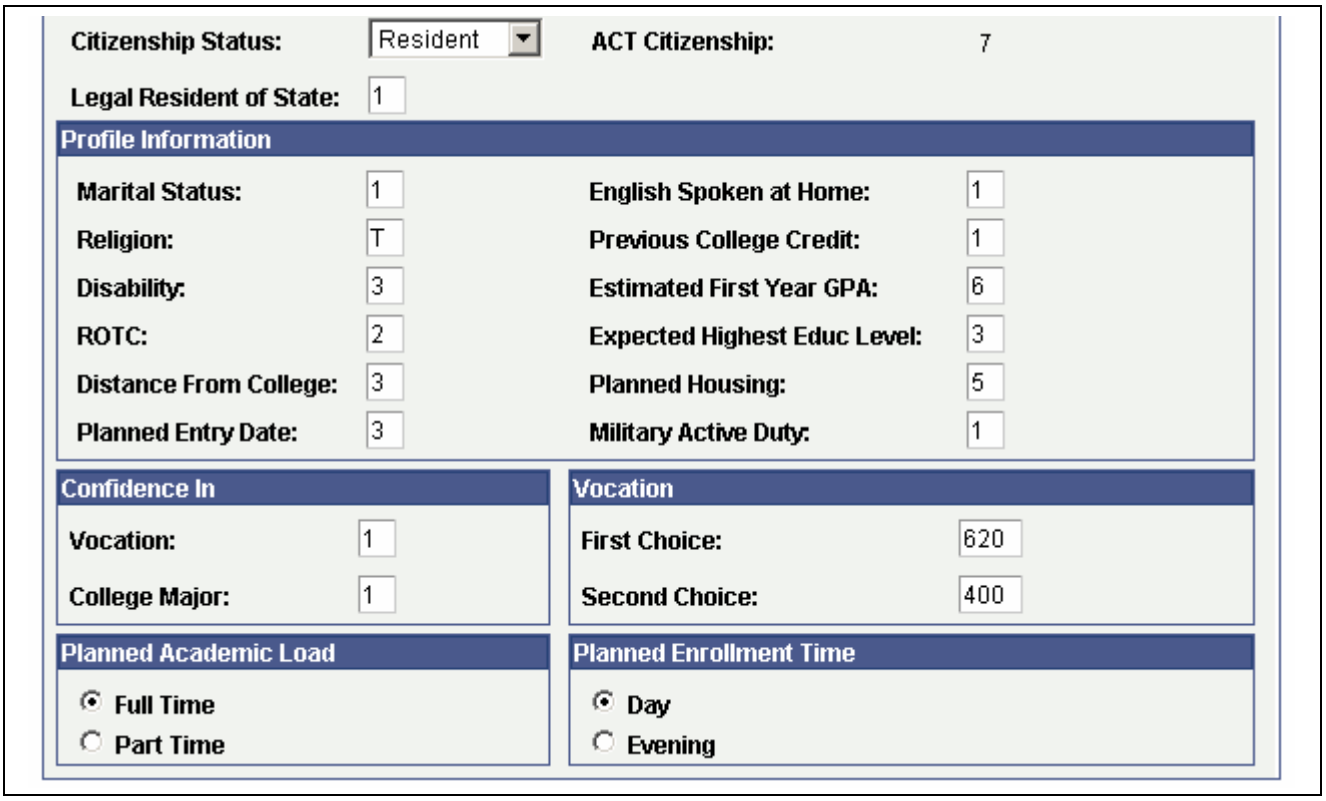
Description	The detailed message.
Comments	Results or other additional information about the message.
Process Instance	The process number of the process that you ran for this record. Process Scheduler generates this number.
Run Date/Time	The day and time the process ran for this record.
Process Name	The name of the application engine that you ran for this record. For example, in the previous page example, the messages displayed from running SAD_TST_LOAD application engine, which is the External Test Score Load process.
User ID	The user ID of the person who ran the process.

Reviewing Personal Information

Access the Personal Information page.



Personal Information page (1 of 2)



Personal Information page (2 of 2)

Use Personal Information page in the suspense component to review and edit biographical and demographic data loaded through the external test data load. Use this page to edit the person's last name, first name, and birth date, if the external data load omitted these values. The data varies depending on the Test ID. Common fields are described below.

When the search/match/post process posts the data in the suspense record, the process posts much of this data to the newly created personal information record.

Note. If the search/match/post process finds a match and updates the existing record with the data in the suspense file, the process does not update the personal information. This prevents you from overriding verified information.

Record Number The test record number. This number is automatically populated based on the Installation parameters.

Date Loaded The date that you loaded this record.

Last Name, First Name, and **Middle Initial** The person's last name, first name, and middle initial or middle name as they appear in the test record. If the last name or first name are empty, enter a value.

ID This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here when the process creates a new record.

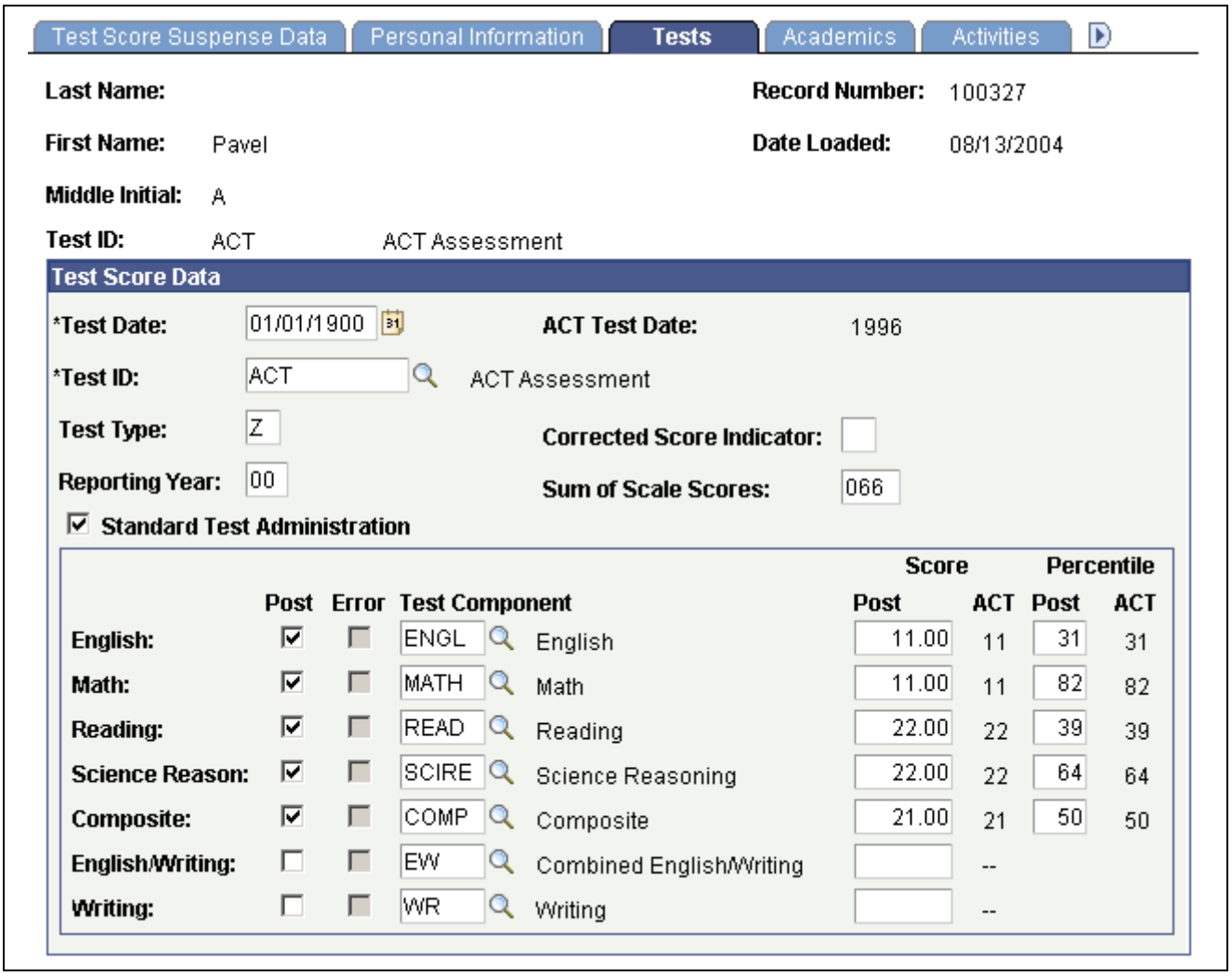
If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.

If the process finds a match and retains the record in the suspense table, and you decide to update an existing ID (by selecting Update ID in the Post field

	on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.
Birthdate	The person's birth date after the load process converts it to the PeopleSoft date standard from the birth date reported on the test.
Name Prefix	A name prefix is inserted here according to the gender from the test record and the prefix criteria you set up on the External Test Score Load page.
Gender	The person's gender. The load process converts the person's gender as reported in the test record to the corresponding PeopleSoft gender code.
Ethnic Group	The person's ethnic group. The load process converts the person's ethnicity code as reported on the test record to the corresponding PeopleSoft ethnic group. This value is populated based on the Ethnic Group Mapping page. This setup must be done for the Test ID indicated or a value will not be populated.
SSN (social security number)	The person's social security number after the load process converts it to the PeopleSoft standard from the social security number reported on the test.
Address 1, Address 2, City, State, Postal Code, Country	The person's address. The load program validates the country for every test where a country code is received. The country code is validated against the PS Country table with the exception of GMAT and ADA which have their own country mapping tables.
Telephone	The person's telephone number.
Citizenship Status	The person's citizenship status. This value is populated based on the conversion of the data from the test record to a PeopleSoft value. Values for this field are delivered with your system as translate values.

Reviewing Test Score Data

Access the Tests page.



Tests page

Test Date The day this person took the test appears. The load process converts the test date delivered with the test to the PeopleSoft format, which appears here. The search/match/post process posts the test date to your database when you run the process for this suspense record.

Test ID Test ID is the ID of the test taken by this person. Define test IDs on the on the Test Tables page. The Test ID is entered as a parameter during the load process.

Post The load process selects this check box if the score and component are valid. You can post the score for this component.

Error The load process selects this check box if it encountered an error with either the component or the score during the load process. You can view additional information about this error on the Test Score Suspense Data page. The error must be cleared in order for the component and score to post to Test Results. Once the specific error is corrected, the Error check box will automatically clear and the Post check box will be selected.

Test Component The test components that you selected on the External Test Score Load page for the Test ID.

Score and **Percentile** The reported score and percentile appears for each component (if applicable).

Performing Search/Match and Posting External Data

This section provides an overview of how to perform search/match and post external data, and discusses how to:

- Post the external data.
- Set up search/match parameters for test score data.

Understanding Performing Search/Match and Posting Test Scores

The search/match/post process consists of two separate processes that complement each other. The search/match process uses data from the suspense record to determine if the person might already exist in your database. The purpose of the search/match is to prevent duplicate records. Duplicate records are very difficult to find and delete after they have been created. The post process uses the data in the suspense record to create a person if they don't already exist and to create or update test score data based on the search/match results. The post process also creates or updates test score candidate data.

You can specify what you want the post process to do when search/match finds a match (or multiple matches). Based the results of the search/match process, the post process can update the record in your database that matches the suspense record if you are sure that the person in your database is the same person the test data is for. For example, if the search/match process found a matching social security number, you might be confident that this is the same person, so the post process could update the record automatically. You can also define search/match parameters that tell the post process to wait on posting the record. This enables you to review the record and decide manually if it matches a record already in your database. For example, you would want to check for yourself whether or not duplication exists if the only parameters that matched were name and gender.

If the search/match process does not find a match, and you selected the Add option for the New parameter on the Search Parameters page, the post process populates data from the suspense record to your database. Data from the suspense records post to the Add/Update a Person component, the Test Results component and the Test Score Candidate Data component. After you post suspense data, you must use these components to edit the information.

You can perform the search/match and post processes separately, or you can perform them together. We recommend that you run the search/match and post processes in one step. This ensures that you process the records in the right order, which can save you a lot of confusion later on.

You might run the search/match/post process more than once for any given suspense record. If the search/match/post process finds possible matches in the suspense table, you must manually determine whether or not a match exists and then run the process again.

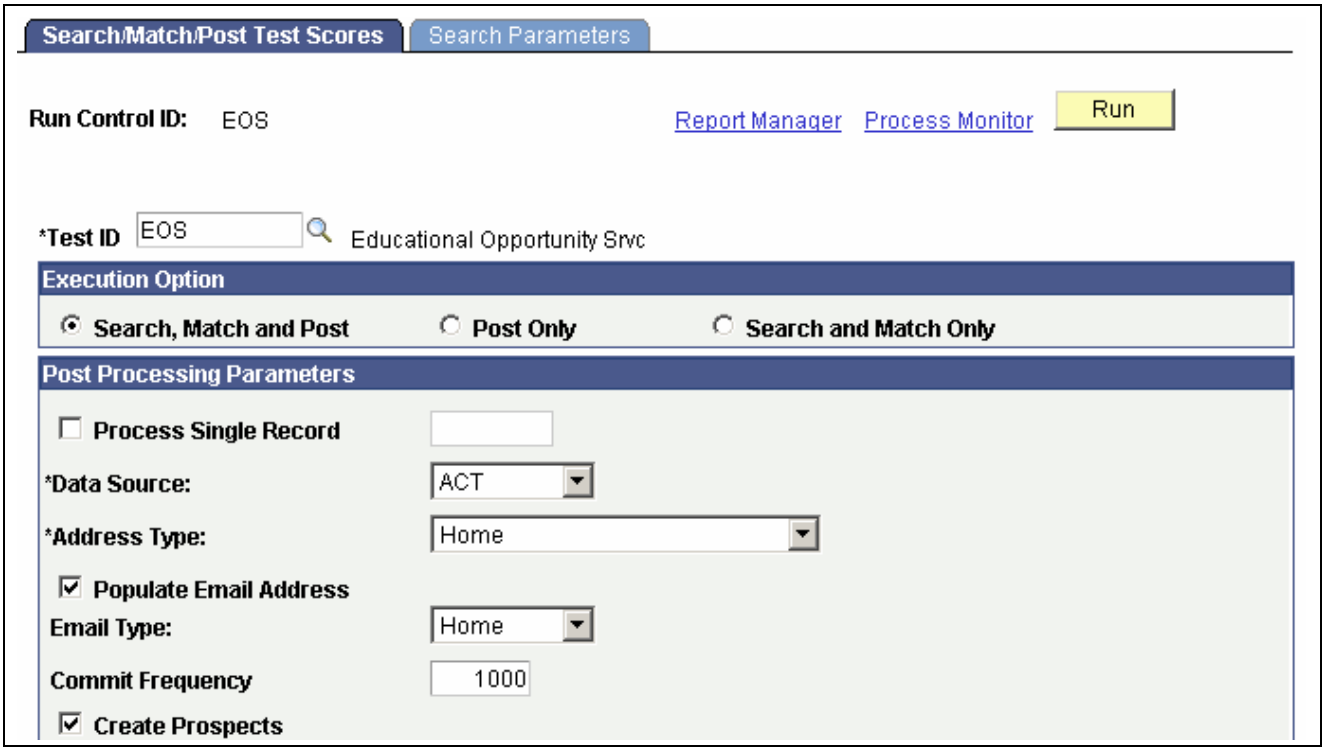
You can also create prospect records for all students for whom you post external test data. Before you create prospects as part of the search/match/post process, you can optionally configure test ID mapping options for academic interests, extracurricular activities and religious preference. Event IDs for 3Cs can also be defined.

Page Used to Perform Search/Match/Post Test Scores

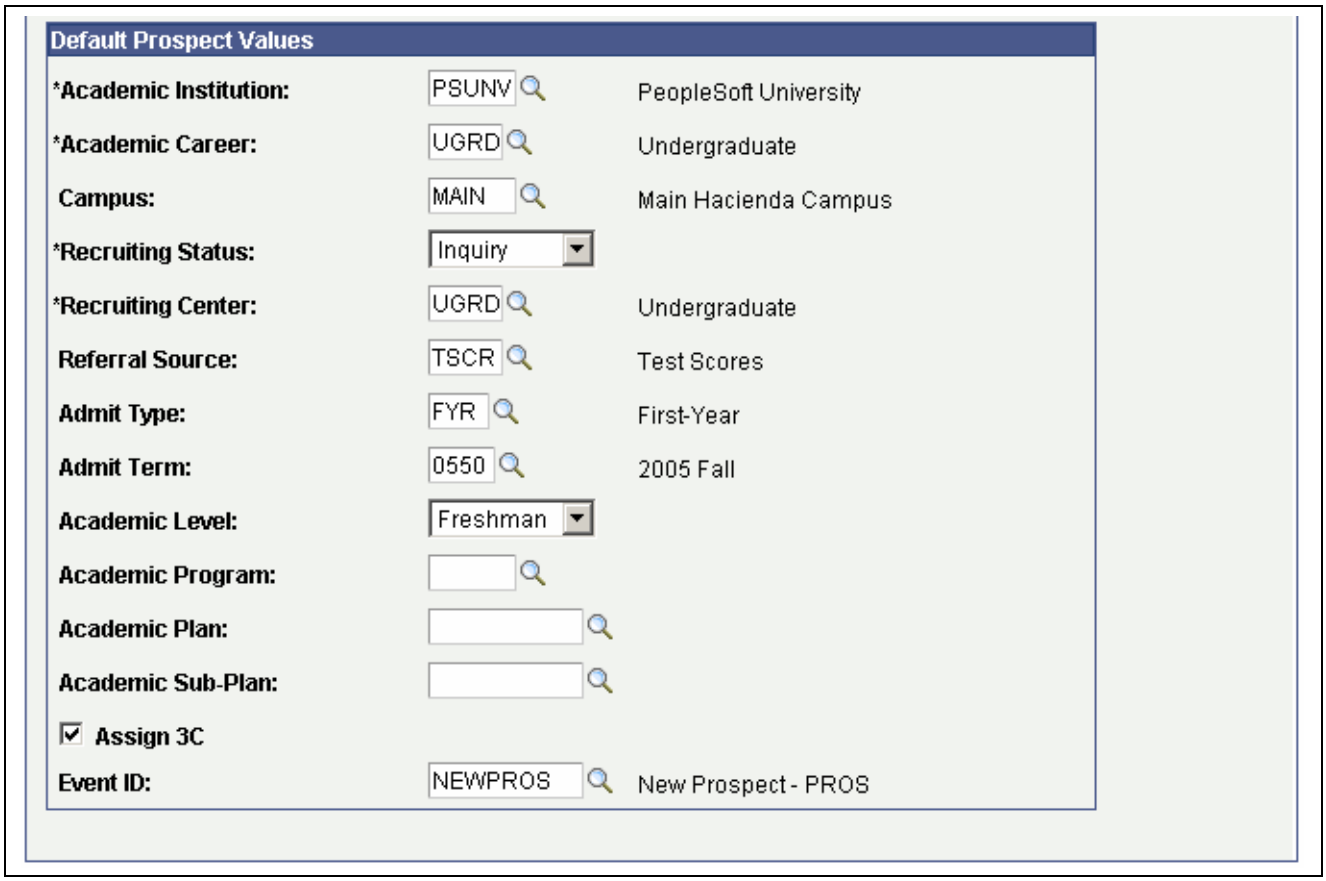
Page Name	Object Name	Navigation	Usage
Search/Match/Post Test Scores	SAD_TEST_POSTS	• Student Recruiting, External Test Score Processing, Search/Match/Post/Test Scores • Student Admissions, External Test Score Processing, Search/Match/Post Test Scores	Post external test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Parameters page. You can post a single record or all of the records in the suspense file. Prospect records can also be created from this data.

Search/Match/Post Test Scores

Access the Search/Match/Post Test Scores page.



Search/Match/Post Test Scores page (1 of 2)



Search/Match/Post Test Scores page (2 of 2)

Test ID Enter the test ID you want to process. Once the Test ID is entered, the additional fields specific to the test will display. You must have Test ID Security established in order to select a value. The prompt will only display Test IDs you have security to access. This field is required.

Execution Option

Search, Match and Post Select this option if you want the process to search your database for records that match the suspense record *and* post the suspense data to your database. This is the recommended option.

Post Only Select this option if you only want to post the suspense data to your database (if you select this option, you must have already run search/match or manually changed the Search and Post process options on the External Test Score Suspense page).

Search and Match Only Select this option if you only want to run the search and match process on the suspense file. You will need to post the data at a later time.

Post Processing Parameters

Process Single Record Select this check box if you want to run the search/match/post process for a single suspense record. The field to the right becomes available. Select the suspense record that you want to process. Only records where the Edit

processing option is set to Complete on the External Test Score Suspense component will display.

Data Source Select the data source from which this information was received. Data source is a required value on the Test Results page. The search/match/post process will post the value that you select here to the Test Results page. Values for this field are delivered with your system as translate values. You can modify these translate values.

Address Type If the search/match/post process adds a new record to your database, the process loads the address information from the test record into the Addresses page. Select the address type that you want the process to assign to the new address. Define address types on the Address Type Table.

Phone Type If the search/match/post process adds a new record to your database, the process loads the phone number from the test record to the Personal Information page. Select the Phone type that you want to process to assign to the new phone number. This field will only appear for Test IDs where the phone number is loaded.

Commit Frequency The commit frequency allows you to decide how often the data is saved during the Search/Match/Post process. The field defaults to 1000. Edit this field to decrease or increase the number of records that are processed before being saved. The commit frequency can help with the performance of the program. A commit frequency that is too low, however, can slow the program down.

Populate Email Address, Email Type Select this check box to post an email address to the Email Addresses on the Add/Update a Person component. If you choose to populate an email address, you must then select an Email Type.

Note. These fields will only appear for test IDs where an email address is loaded.

Create Prospects Select to create prospect records for the IDs that are added or for existing IDs where no prospect record exists from the test score post. The Default Prospect Values group box becomes available to enter default values for the prospect records that the system creates. You can view prospect data in the Create/Update Prospect component under the menu Student Recruiting, Maintain Prospects.

Default Prospect Values

Select the default values that you want the system to assign to the prospects that you create from the test score post. For example, if you select *UGRD* in the Academic Career field, the system will assign every prospect it creates to the undergraduate academic career. To create prospects, you must enter an academic institution, academic career, recruiting status, and recruiting center. In certain circumstances, you might also want to assign additional information, such as academic program and plan, and admit term, when your test load contains a specific set of prospects.

Academic Program Because the Academic Program table is keyed by admit term, you must select an admit term to select an academic program. You do not have to assign an academic program.

Assign 3C Select this check box to assign 3Cs to the prospects that you create from the test score post. The Event ID field becomes available.

Event ID Assign an event ID to the prospects you create from the test score post. Only the event IDs that have the administrative functions PROS (prospect) and PROP (prospect program) will be available. PROP is only available if you select an academic program on this page. Define event IDs on the Event Definition page.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Using the 3C Engine," Understanding the 3C Engine.

Setting Up Search Parameters for Test Score Data

Access the Search Parameters page. Use this page to set up your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete. This page is the same for each Test ID entered on the Search/Match/Post Test Scores page.

Select Student Recruiting, External Test Score Processing, Search/Match/Post Test Scores or Student Admissions, External Test Score Processing, Search/Match/Post Test Scores.

See Also

Chapter 15, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 245

Researching Duplicate Records

In the search dialog page of the External Test Score Suspense component, enter the Test ID you want to review, *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Upon entering the component, the Test Score Suspense Data page displays the search/match level involved in the possible match and the number of individuals in the database that match the criteria in the Search/Match Results group box.

For example, suppose that the Order Number field in the Search/Match Results group box displayed 40 and the number of matches displayed is three. At PSUNV, Order Number of 40 means that the process is checking for a matching name and gender. Therefore, you know that there are three people in your database with the same name and gender as the person in the suspense record. Use the Search/Match component to look up the name and gender that matches the suspense record and compare the other information (such as address) to determine whether or not the person in the database is the same as in the suspense record. Select Student Recruiting, External Test Score Processing, Search/Match or Student Admissions, External Test Score Processing, Search/Match to access this page.

If the person from the suspense record is *not* the same as a person in your database, set the Search field to *Complete* and the Post field to *New ID Add*.

If the person from the suspense record *is* the same as a person in your database, set the Search field to *Complete* and the Post field to *Update Existing ID*. Then go to the Personal Information page and enter the ID that you want to update. Note, however, that the search/match/post process only *updates* test score and candidate data information. The process does not update bio/demo data because some bio/demo data may have already been verified.

Re-Running the Search/Match/Post Process

The process posts the suspense records where you manually changed the Search/Match processing option to Complete and the Post processing option to New ID Add or Update Existing ID. By this time, all of your suspense records should be posted to your database. When a record posts a new record to your database, the post process assigns an ID to the person. To view a bio/demo record that the post process created, select Student Recruiting, External Test Score Processing, Add/Update a Person or Student Admissions, External Test Score Processing, Add/Update a Person. To view a test score record that the post process created or updated, select Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results. To view the additional data from the testing agency not posted to Test Results or Add/Update a Person, select Student Recruiting, External Test Score Processing, Test Score Candidate Data or Student Admissions, External Test Score Processing, Test Score Candidate Data. If you chose to create a prospect record, select Student Recruiting, Maintain Prospects, Add/Update a Prospect.

See Also

Chapter 10, “Tracking Supporting Prospect and Applicant Information,” Tracking Test Results for Prospects and Applicants, page 122

Chapter 14, “Adding and Updating Applications,” Entering or Updating Applicant Biographical Data, page 174

Purging Suspense Files and Test Score Messages

This section discusses how to use the external test score purge and test score messages purge pages to purge suspense records and test score messages.

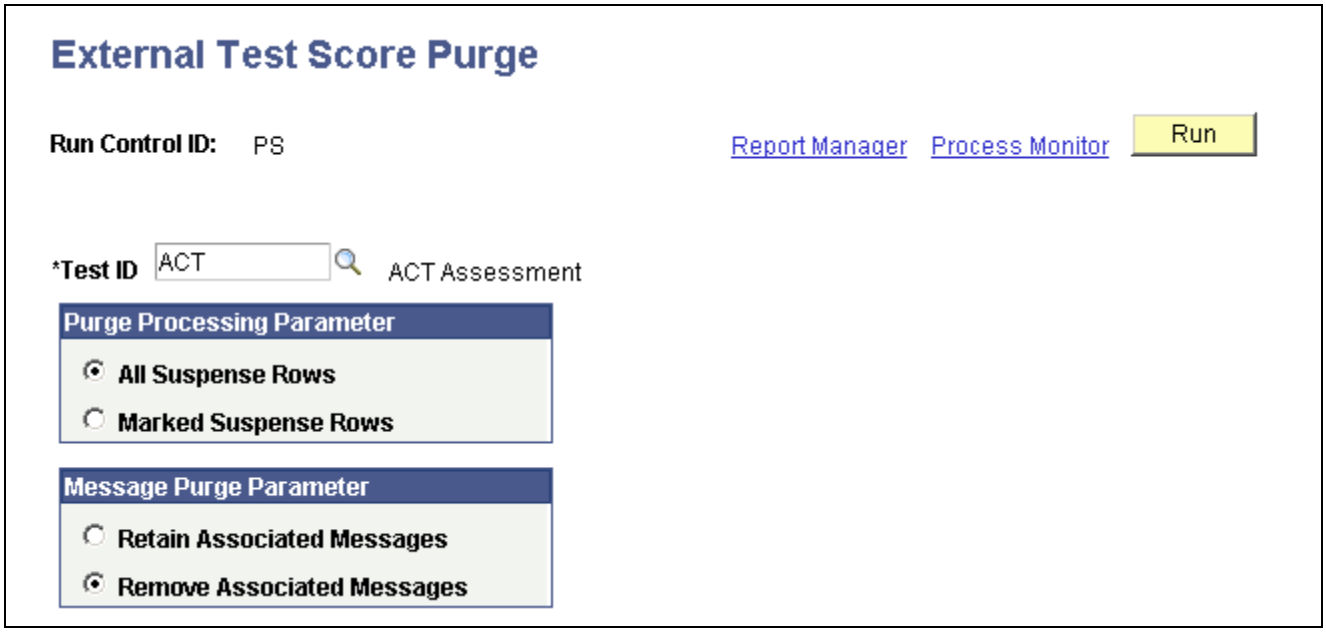
Note. If you intend to perform an analysis on your test score processing, do not purge your test score messages with the External Test Score Purge process. Instead, purge them at a later date when you know you no longer have a need to view them using the Test Score Messages Purge process.

Pages Used to Purge Suspense Files and Test Score Messages

Page Name	Object Name	Navigation	Usage
External Test Score Purge	SAD_TEST_PURGE	• Student Recruiting, External Test Score Processing, External Test Score Purge • Student Admissions, External Test Score Processing, External Test Score Purge	Purge suspense records and test score messages for a specific test ID.
Test Score Messages Purge	TST_SCORE_PARMS	• Student Recruiting, External Test Score Processing, Test Score Messages Purge • Student Admissions, External Test Score Processing, Test Score Messages Purge.	Purge all test score messages. You can run a process to purge all test scores remaining in your suspense files for all external test scoreloads.

Using the External Test Score Purge page

Access the External Test Score Purge page.



External Test Score Purge page

Test ID Enter the test ID you want to delete from the suspense record. The test ID list that appears in the prompt is based on the Test ID Security.

All Suspense Rows Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.

Marked Suspense Rows Select this option if you only want to purge those records in your suspense file marked *Purge* in the Post field on the Process Options page. Select this option

	if you suspect that there are still suspense records that need to be processed. The purge process will only delete suspense records with *Purge* in the Post field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Reviewing Test Score Candidate Data

This section provides an overview of candidate data.

Understanding Reviewing Test Score Candidate Data

The search/match/post process posts candidate data (according to the test) to the Test Score Candidate Data component. This component is informational only. The data in this component does not affect other data in your database. For example, if you change a person's name in this component, it would not change the name anywhere else in the system. If you choose however to create prospects from test scores, some of this data is used for the process such as graduation date, intended major and extracurricular activities.

Many of the values and codes that appear in the Test Score Candidate Data components are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer to the test score layout you received from the testing agency.

Before entering the Test Score Candidate Data component, you must enter the Test ID. The pages in the component dynamically display based on the Test ID entered. The number of pages that appear in the component depend on the Test ID. You must have Test ID Security defined for your user ID in order to access the component. The pages shown below are an example of the Test Score Candidate Data component.

Pages Used to Review Test Score Candidate Data

Page Name	Object Name	Navigation	Usage
Personal Information	SAD_ACT_CD, SAD_ADA_CD, SAD_AMC_CD, SAD_LAW_CD, SAD_SAT_CD, SAD_SSS_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Personal Information	This page appears for ACT, ADA, AMCAS, LSAT/LSDAS, SAT and SSS. Review the student's personal information as it was received from the testing agency. The fields will vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.

Page Name	Object Name	Navigation	Usage
Test Score Candidate Data	SAD_AP_CD, SAD_CRS_CD, SAD_DAT_CD, SAD_EOS_CD, SAD_GMT_CD, SAD_GRE_CD, SAD_GMS_CD, SAD_TFL_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Test Score Candidate Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Test Score Candidate Data	This page appears for AP, CRS, DAT, EOS, GMAT, GRE, GMASS and TOEFL. Review the student's personal and academic information as it was received from the testing agency. The fields will vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.
Academics	SAD_ACT_CD_ACAD, SAD_LAW_CD_SCH	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Academics • Student Admissions, External Test Score Processing, Test Score Candidate Data, Academics	This page displays for ACT and LSAT/LSDAS. Access a student's test and academic data as reported by the testing agency. The fields will vary depending on the test ID.
Activities	SAD_ACT_CD_ACT	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Activities • Student Admissions, External Test Score Processing, Test Score Candidate Data, Activities	This page displays for ACT only. Access student profile high school and projected college activity information.
Interests	SAD_ACT_CD_INT	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Interests • Student Admissions, External Test Score Processing, Test Score Candidate Data, Interests	This page displays for ACT only. Access student profile interest and college preference information.
Education	SAD_ADA_CD_ED	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Education • Student Admissions, External Test Score Processing, Test Score Candidate Data, Education	This page appears for ADA. Review a student's academic history as reported from AADSAS.

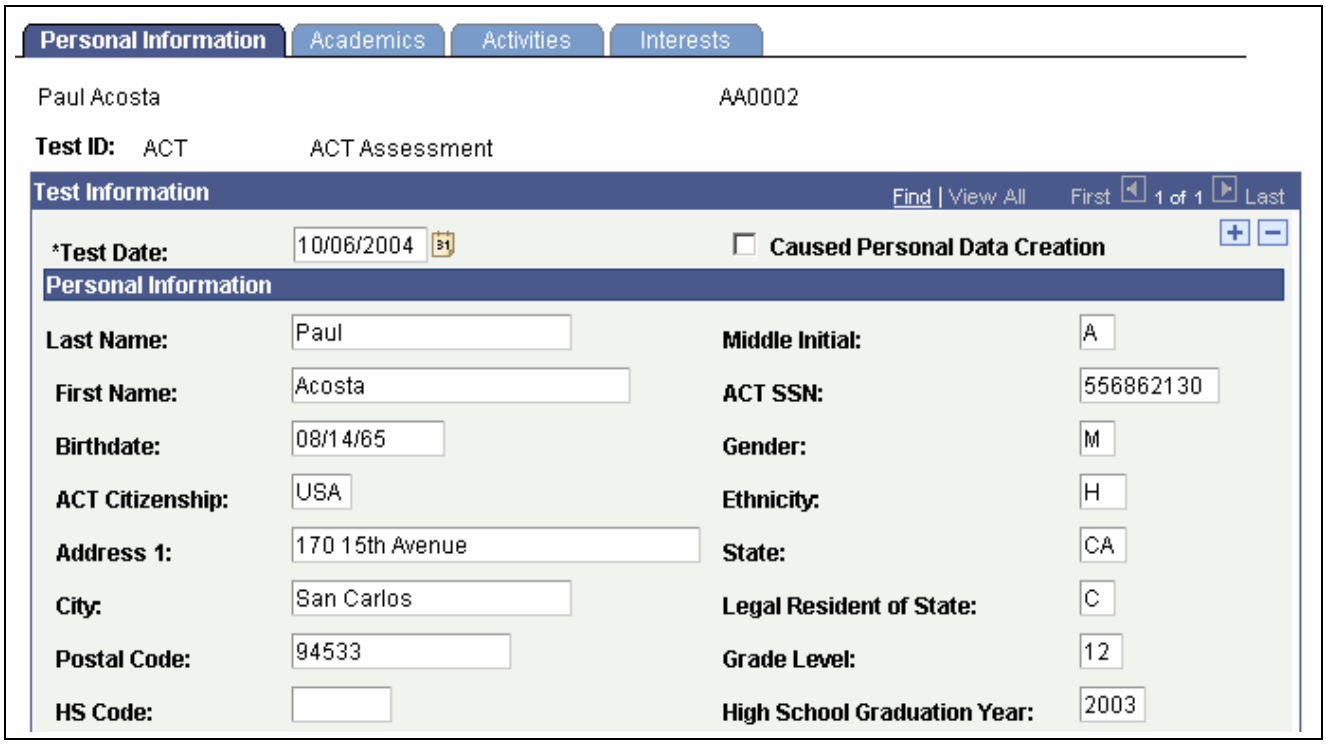
Page Name	Object Name	Navigation	Usage
Applicant Data	SAD_ADA_CD_DATA, SAD_AMC_CD_OTH	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Applicant Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Applicant Data	This page appears for ADA and AMCAS. Review the student's data to support their application for admission as it was received from the testing agency. The fields will vary depending on the test ID.
Application	SAD_ADA_CD_APP, SAD_AMC_CD_APP	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Application • Student Admissions, External Test Score Processing, Test Score Candidate Data, Application.	This page appears for ADA and AMCAS. View the results of the Create Applicants from Test process for this student. You can also select not to create an application for this student by selecting *Do Not Use for Create Appl* in the Post Option field.
Courses	SAD_ADA_CD_CRS	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Courses • Student Admissions, External Test Score Processing, Test Score Candidate Data, Courses	This page appears for ADA. Review a student's academic course work and grades as reported by AADSAS.
Colleges	SAD_AMC_CD_COL	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Colleges • Student Admissions, External Test Score Processing, Test Score Candidate Data, Colleges	This page will appear for AMCAS. Review a student's prior colleges attended as well as previous majors and degrees earned as provided by AAMC.
GPA/ Hours	SAD_AMC_CD_GPA	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, GPA/Hours • Student Admissions, External Test Score Processing, Test Score Candidate Data, GPA/Hours	This page will appear for AMCAS. Review a student's grade point averages and credit hours as provided by AAMC.

Page Name	Object Name	Navigation	Usage
Awards	SAD_AP_CD_AWRD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Awards • Student Admissions, External Test Score Processing, Test Score Candidate Data, Awards	This page appears for AP. Review the student's awards information including award type and year as reported from the Advanced Placement exam.
Schools	SAD_AP_CD_SCHL	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Schools • Student Admissions, External Test Score Processing, Test Score Candidate Data, Schools	This page appears for AP. Review a student's high school and college information as reported from the Advanced Placement exam.
Test Data	SAD_AP_CD_TEST, SAD_LAW_CD_SB, SAD_SAT_CD_TEST	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Test Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Test Data	This page appears for AP, LSAT/LSDAS and SAT. Review additional test data as reported by the testing agency that is not posted to the Test Results page. The fields will vary depending on the test ID.
Additional Data	SAD_CRS_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Additional Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Additional Data.	This page appears for CRS. Review the student's academic, employment and search related data as provided by LSAC.
Prior Schools	SAD_LAW_CD_MATR	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Prior Schools • Student Admissions, External Test Score Processing, Test Score Candidate Data, Prior School.	This page appears for LSAT/LSDAS. Review undergraduate academic data and prior law schools attended as provided by LSAC.

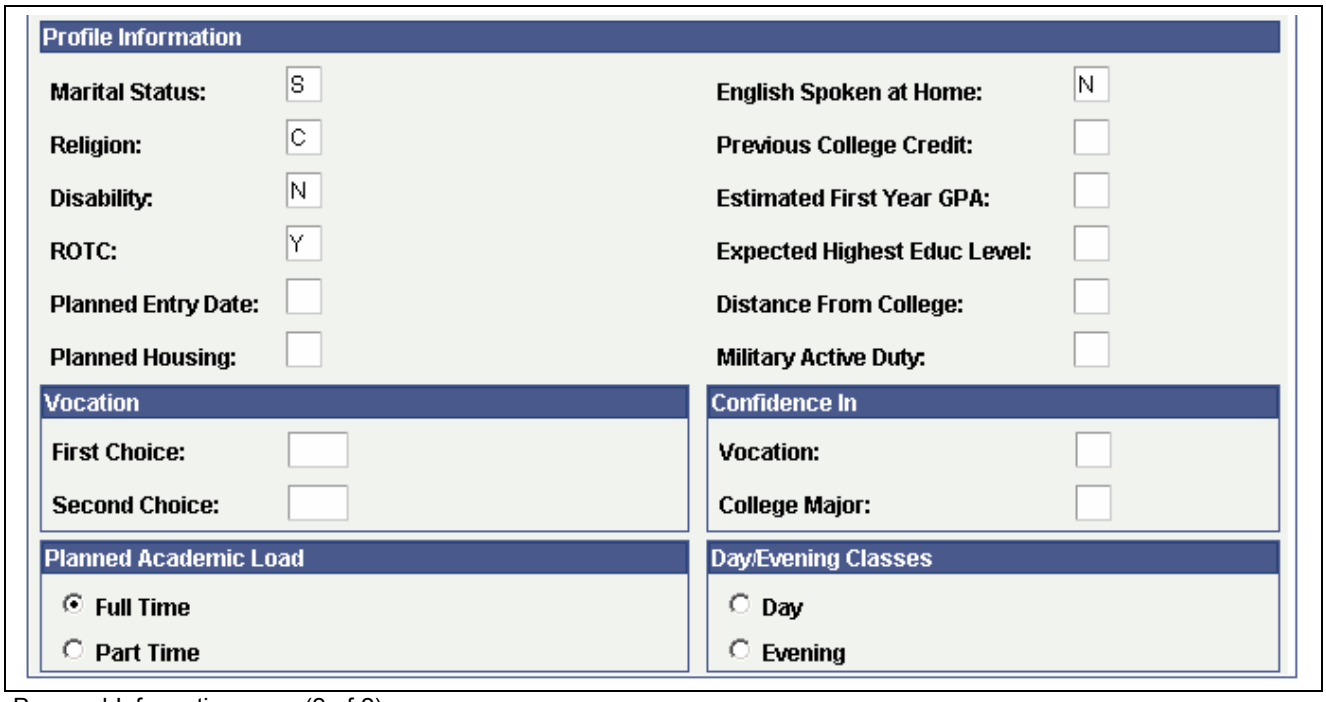
Page Name	Object Name	Navigation	Usage
Candidate Data	SAD_LAW_CD_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Candidate Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Candidate Data	This page appears for LSAT/LSDAS. Review the student's additional test and application information as provided by LSAC.
Recommendations	SAD_LAW_CD_REC	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Recommendations • Student Admissions, External Test Score Processing, Test Score Candidate Data, Recommendations	This page appears for LSAT/LSDAS. Review letter of recommendation data as provided by LSAC.
Student Data	SAD_SAT_CD_STD, SAD_SSS_CD_SDQ	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Student Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Student Data	This page appears for SAT and SSS. Review additional information about the student as provided by ETS. The fields will vary depending on the test ID.
School Data	SAD_SAT_CD_SCH	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, School Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, School Data	This page appears for SAT. Review college preference information for a student. If the test type is College, you can review the high school information for the student as provided by ETS. If the test type is Secondary, you can review the colleges the student submitted their test scores to as provided by ETS. The data that appears on the page will depend on the test type you selected during the external test score load process.

Reviewing Candidate Data Personal Information

Access the Personal Information page.



Personal Information page (1 of 2)



Personal Information page (2 of 2)

Personal and academic data posted from the suspense record appears in these fields.

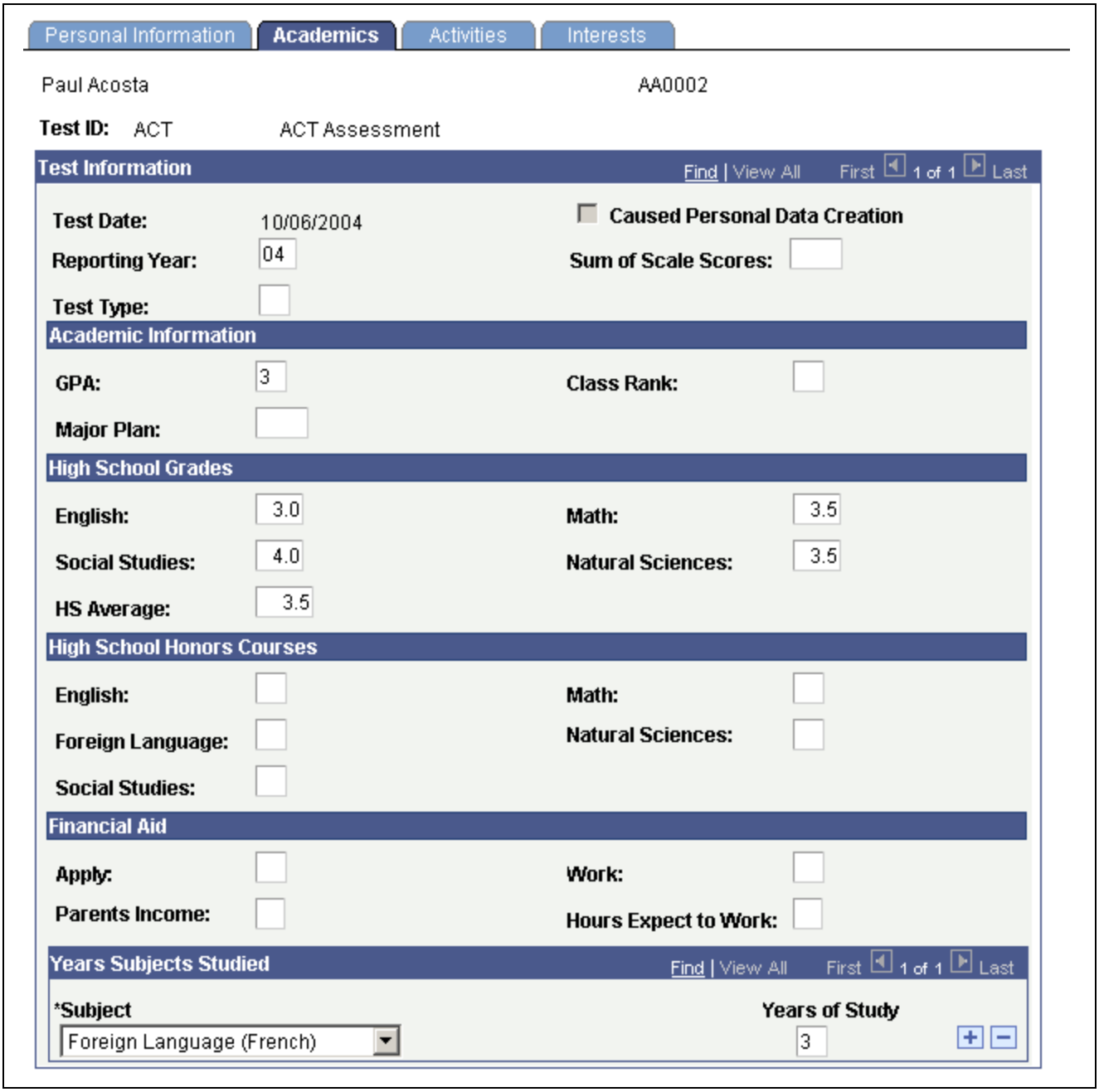
Test ID The test entered you entered on the search page. The pages to the component will vary based on the test ID.

Test Date The day the person took the test.

Caused Personal Data Creation Indicates whether or not the process added a new ID to your database.

Reviewing Academic Information

Access the Academics page.

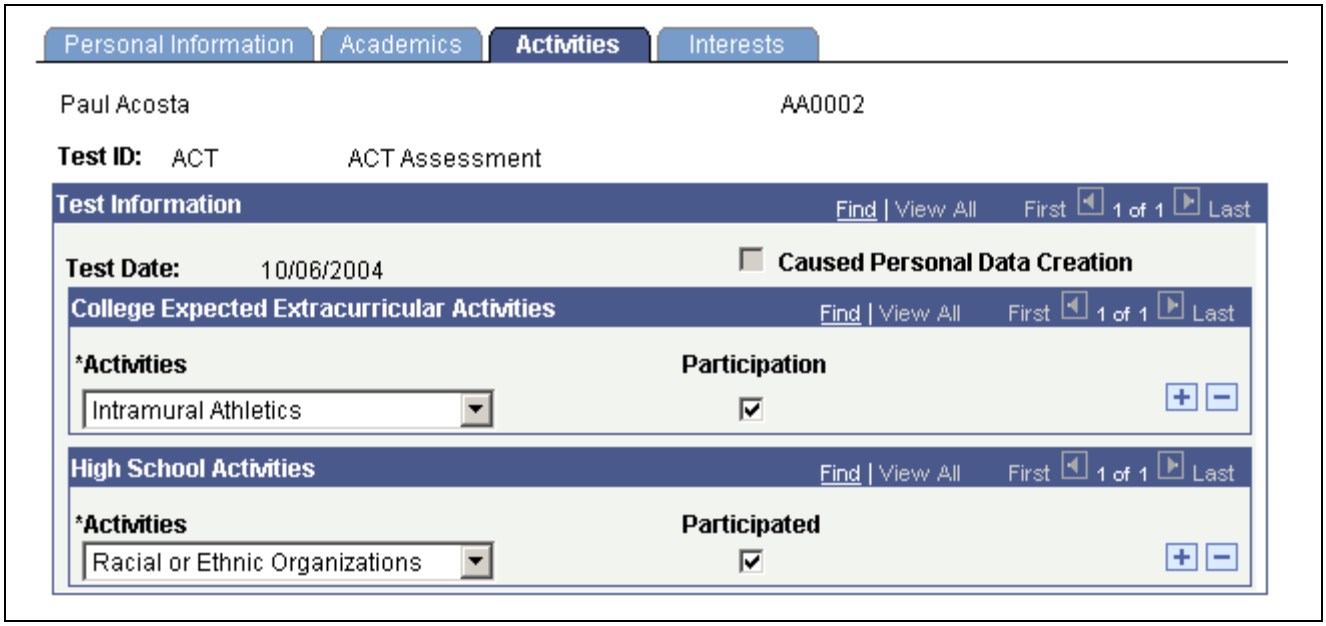


Academics page

Academic information data posted from the suspense record appears in these fields.

Reviewing Student Profile High School and College Activity Information

Access the Activities page.

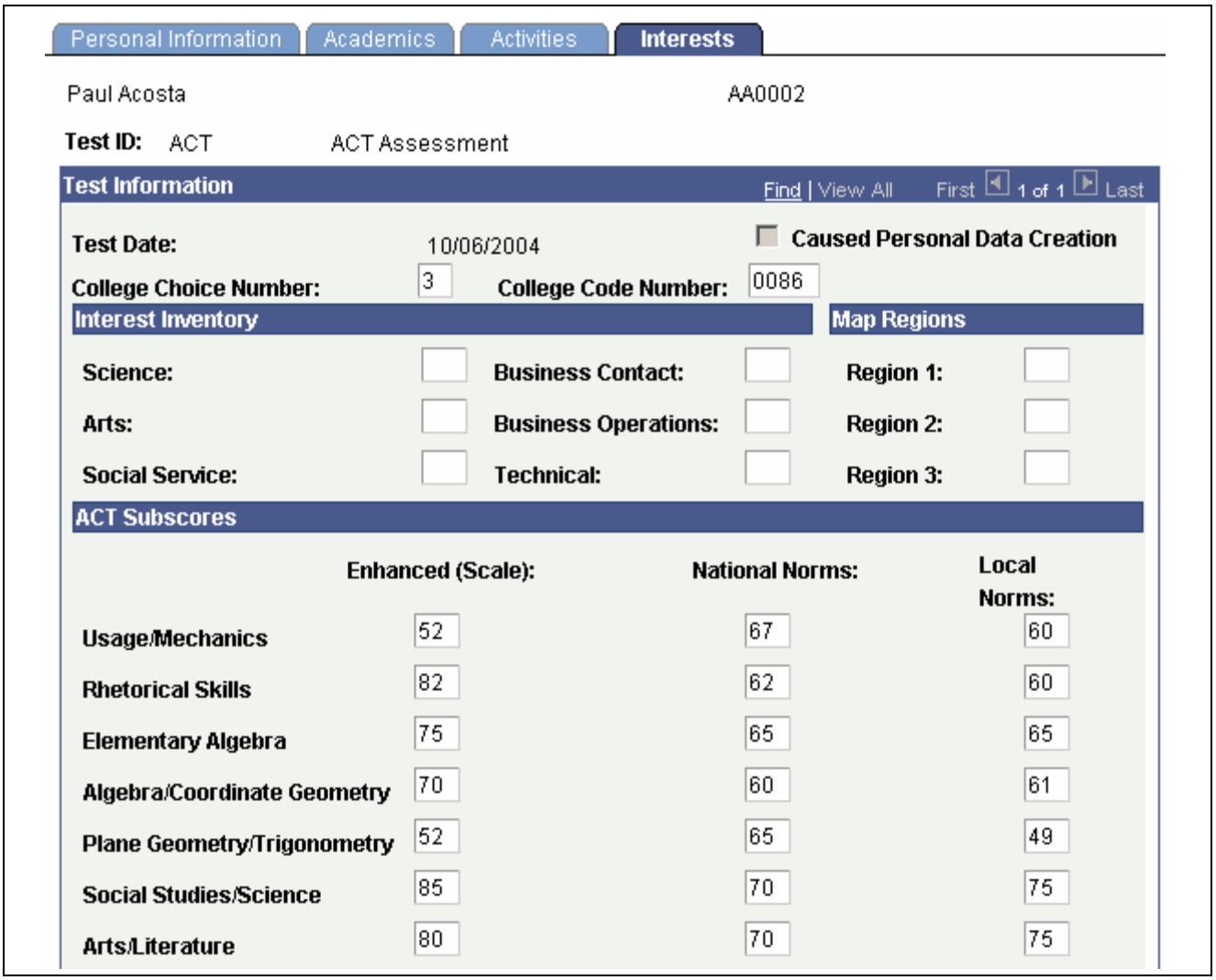


Activities page

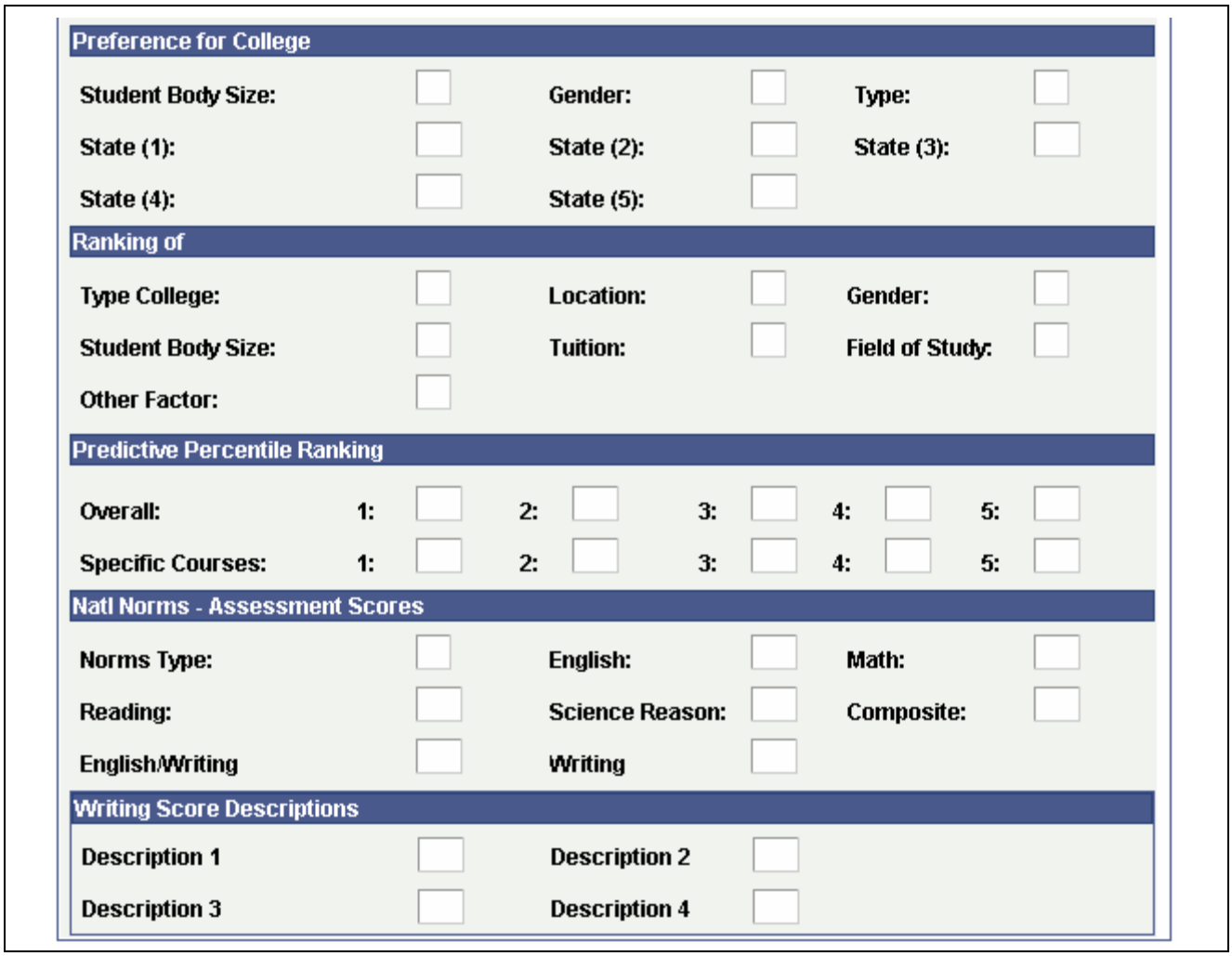
High school and college activities data posted from the suspense record appears on this page.

Reviewing Interest Information

Access the Interests page.



Interests page (1 of 2)



Interests page (2 of 2)

Interest and college preference data posted from the suspense record appears on this page.

Viewing Test Score Messages Summary Information

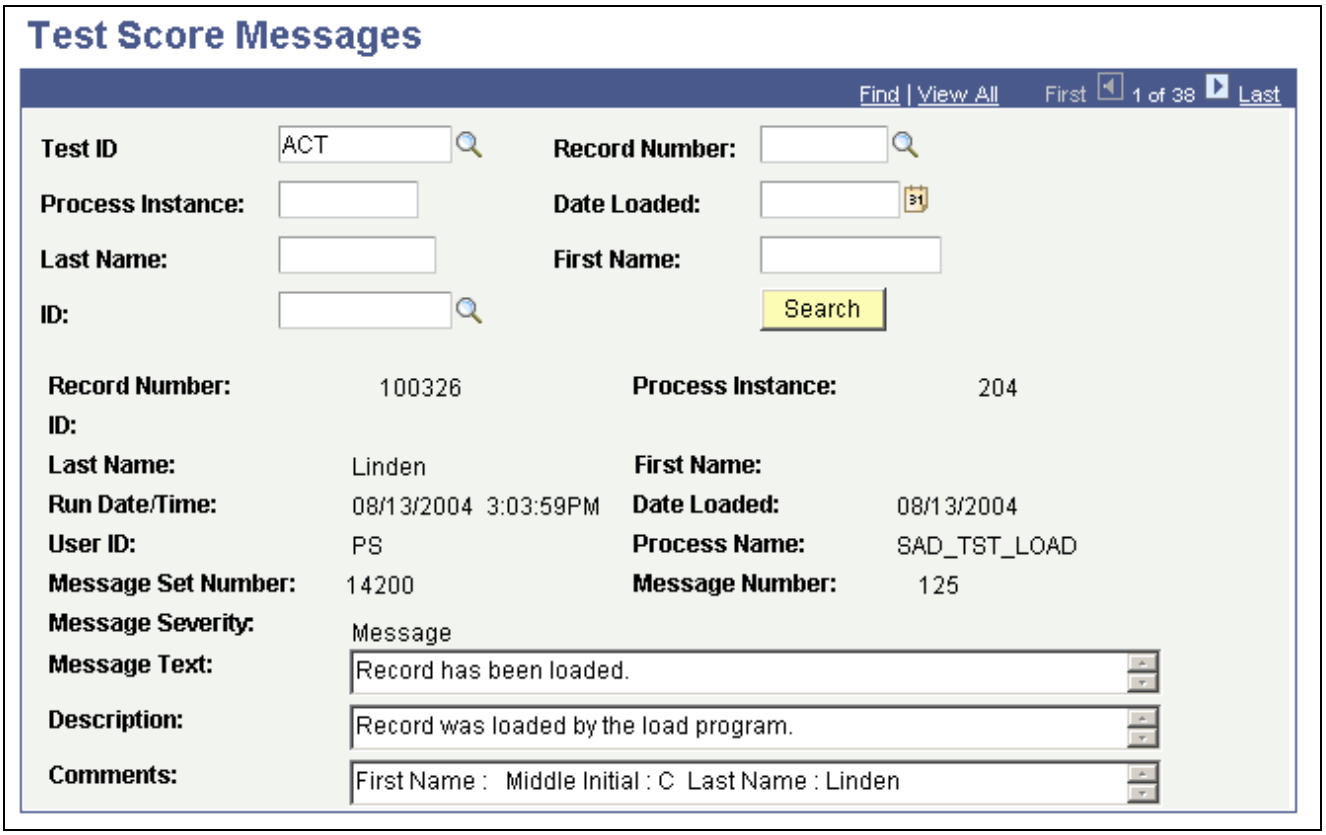
This section discusses how to use the Test Score Messages page to view a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Page Used to View Test Score Messages Summary Information

Page Name	Object Name	Navigation	Usage
Test Score Messages	TST_SCORE_MSG_TBL	• Student Recruiting, External Test Score Processing, Test Score Messages • Student Admissions, External Test Score Processing, Test Score Messages	View a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Viewing Test Score Messages Summary Information

Access the Test Score Messages page.



Test Score Messages page

Test ID Enter the test ID you want to view the test messages for. The fields that appear in the prompt will be based on your Test ID security.

Record Number Select the record number for which you want to search for test score messages.

Process Instance Select the process instance for which you want to search for test score messages.

Date Loaded Select the date loaded for which you want to search for test score messages.

Last Name Select the last name for which you want to search for test score messages.

First Name	Select the first name for which you want to search for test score messages.
ID	Select the ID for which you want to search for test score messages.
Search	Click the Search button to bring up information matching your search criteria.

CHAPTER 18

(CAN) Receiving External Applications from OUAC

This chapter provides an overview of external; applications from OUAC and discusses how to:

- Pre-load OUAC data.
- Load OUAC data through the EDI Manager.
- Load additional data through an SQR process.
- Review and edit OUAC transaction A/U staging tables.
- Review and edit OUAC transaction B5 staging tables.
- Review and edit OUAC transaction B/V-E staging tables.
- Review and edit OUAC transaction F staging tables.
- Review and edit OUAC transaction G/H staging tables.
- Review and edit OUAC transaction J/N staging tables.
- Review and edit OUAC transaction P/R staging tables.
- Review and edit OUAC transaction T staging tables.
- View search/match and OUAC processing statuses.
- Post OUAC transaction data.
- View OUAC messages.
- Review overflow OUAC application information.

Understanding External Applications from OUAC

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.

PeopleSoft developed the OUAC interface using EDI Manager. This tool enables you to load data that you receive electronically from OUAC into your PeopleSoft application. The system posts personal data, application data, academic history, and testing information to core tables in your database.

To process OUAC transactions, you first run a pre-load process that prepares the OUAC file for EDI. Then you load the data from the OUAC file into staging tables in your application. While the data is in the staging tables you can view and edit the data. When you are ready, you post the data to tables in your application.

The OUAC defines the fields on these pages. Please refer to the *OUAC Systems Manual* for explanations of the individual fields on each page.

Pre-Loading OUAC Data

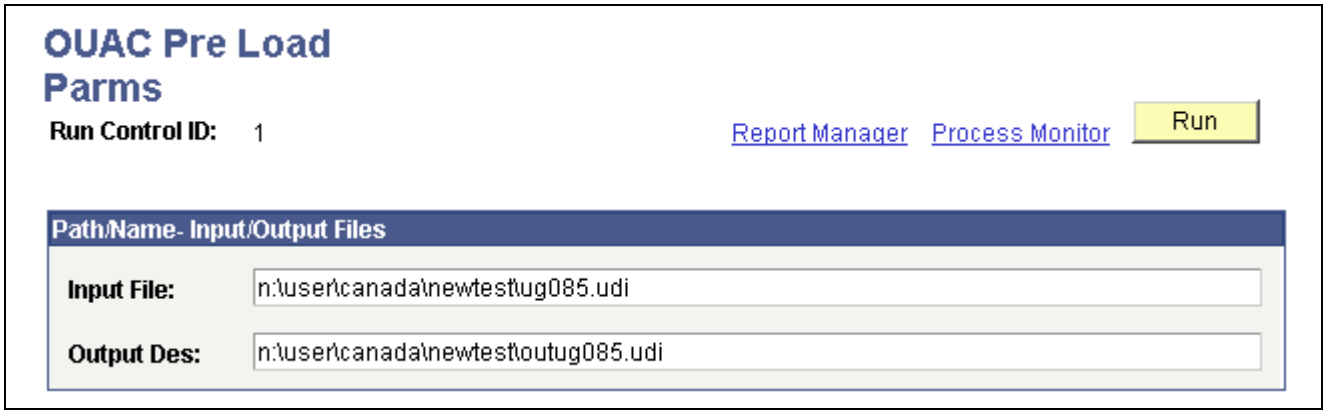
This section discusses how to pre-load OUAC data.

Page Used to Pre-Load OUAC Data

Page Name	Object Name	Navigation	Usage
OUAC Pre Load Parms (OUAC pre load parameters)	OUAC_PRELOAD_PARMS	Student Admissions, OUAC, Process, Pre Load Data Process	Prepare the OUAC file for EDI. The OUAC pre load process adds control records to transaction groups and sends them to the output file.

Using the OUAC Pre Load Parms Page

Access the OUAC Pre Load Parms (OUAC pre load parameters) page.



OUAC Pre Load Parms page

Input File Enter the full path and name of the OUAC file that you want to process.

Output Des (output description) Enter the full path and name of the output file.

Click the Run button to run the OUAC pre load process at user-defined intervals.

Loading the OUAC Data Through the EDI Manager

Use the Schedule Inbound EC Agent - Run Control Parameters page to load the OUAC data through EDI Manager. The Inbound EC Agent process (ECIN0001) translates the values in the flat file created by the OUAC pre-load process and loads them into staging tables. Set the run option parameter to single file and the force profile parameter to do not force.

See Also

PeopleSoft PeopleTools PeopleBooks

Loading Additional Data Through an SQR Process

This section discusses how to load additional data through an SQR process.

Page Used to Load Additional Data Through an SQR Process

Page Name	Object Name	Navigation	Usage
OUAC Load	PRCSRUNCNTL_AD_OL	Student Admissions, OUAC, Processes, Load OUAC Data	Translate OUAC data that EDI Manager is not equipped to handle (such as dates that are in YYMM format, name fields that need to be converted to the PeopleSoft format, and other character fields that need to be converted to mixed case).

Reviewing and Editing the OUAC Transaction A/U Staging Tables

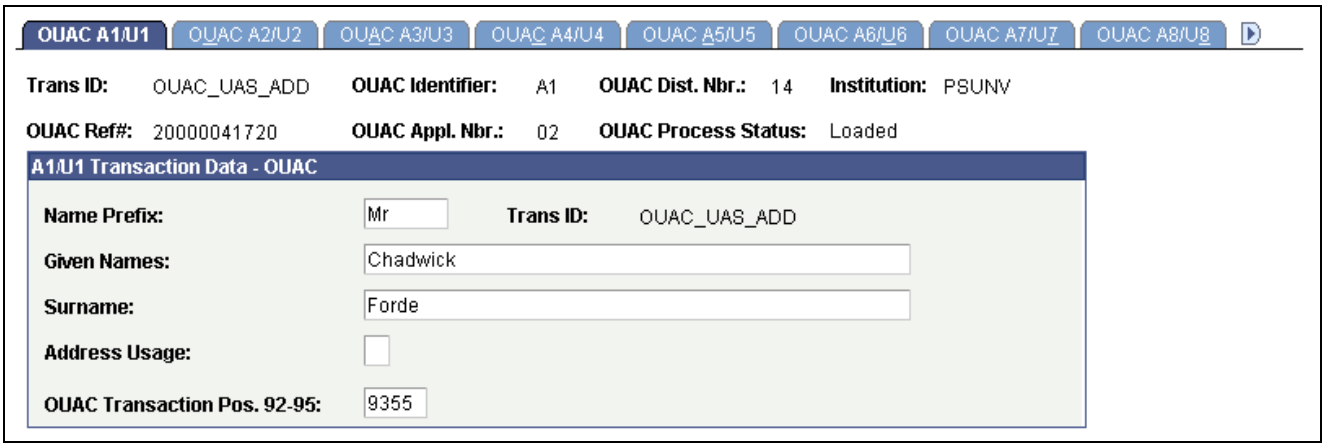
This section discusses how to use the OUAC Transactions A/U component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction A/U Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC A1/U1	OUAC_A1_U1_PNL	Student Admissions, OUAC, Transactions, Transactions A/U	Review and edit OUAC transaction data.
OUAC A2/U2	OUAC_A2_U2_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A2/U2	Review and edit OUAC transaction data.
OUAC A3/U3	OUAC_A3_U3_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A3/U3	Review and edit OUAC transaction data.
OUAC A4/U4	OUAC_A4_U4_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A4/U4	Review and edit OUAC transaction data.
OUAC A5/U5	OUAC_A5_U5_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A5/U5	Review and edit OUAC transaction data.
OUAC A6/U6	OUAC_A6_U6_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A6/U6	Review and edit OUAC transaction data.
OUAC A7/U7	OUAC_A7_U7_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A7/U7	Review and edit OUAC transaction data.
OUAC A8/U8	OUAC_A8_U8_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A8/U8	Review and edit OUAC transaction data.
OUAC A9/U9	OUAC_A9_U9_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A9/U9	Review and edit OUAC transaction data.
OUAC AR	OUAC_AR_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC AR	Review and edit OUAC transaction data.

Reviewing OUAC Transactions A1/U1

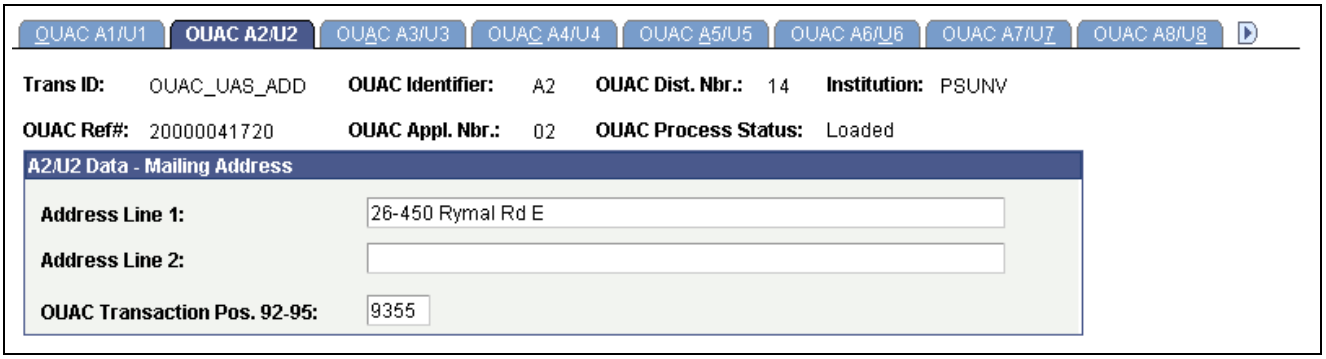
Access the OUAC A1/U1 page.



OUAC A1/U1 page

Reviewing OUAC Transactions A2/U2

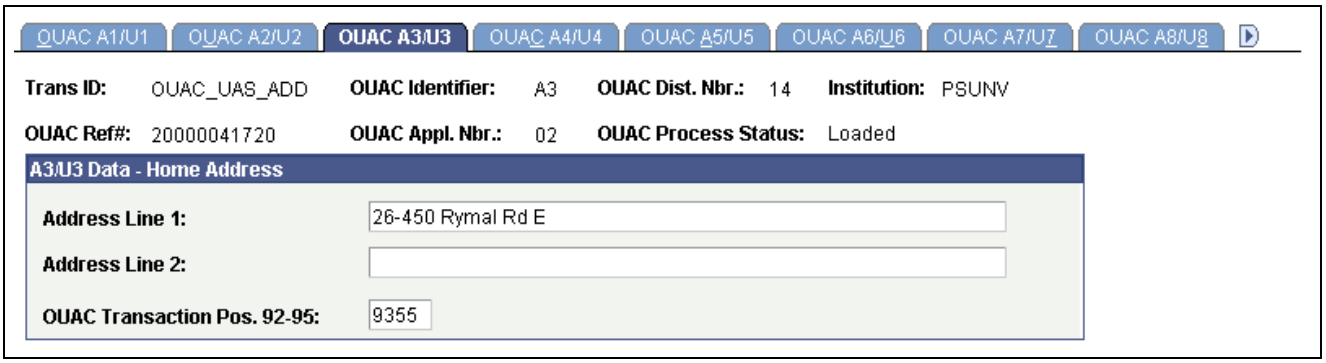
Access the OUAC A2/U2 page.



OUAC A2/U2 page

Reviewing OUAC Transactions A3/U3

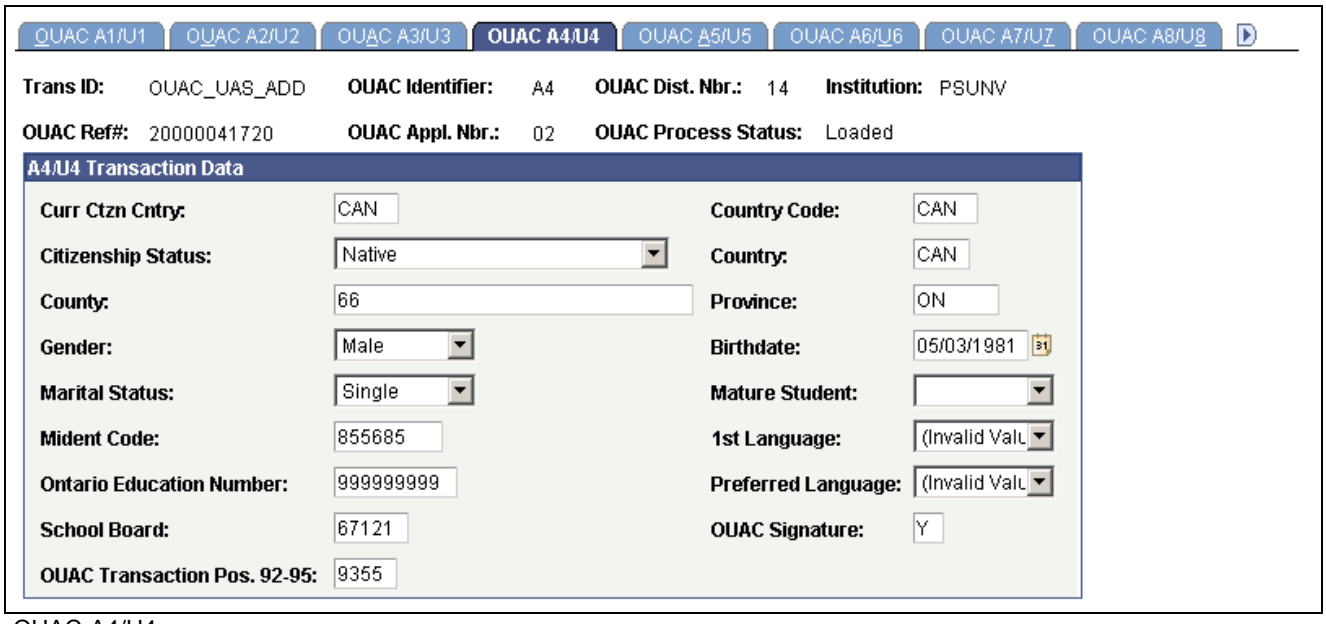
Access the OUAC A3/U3 page.



OUAC A3/U3 page

Reviewing OUAC Transactions A4/U4

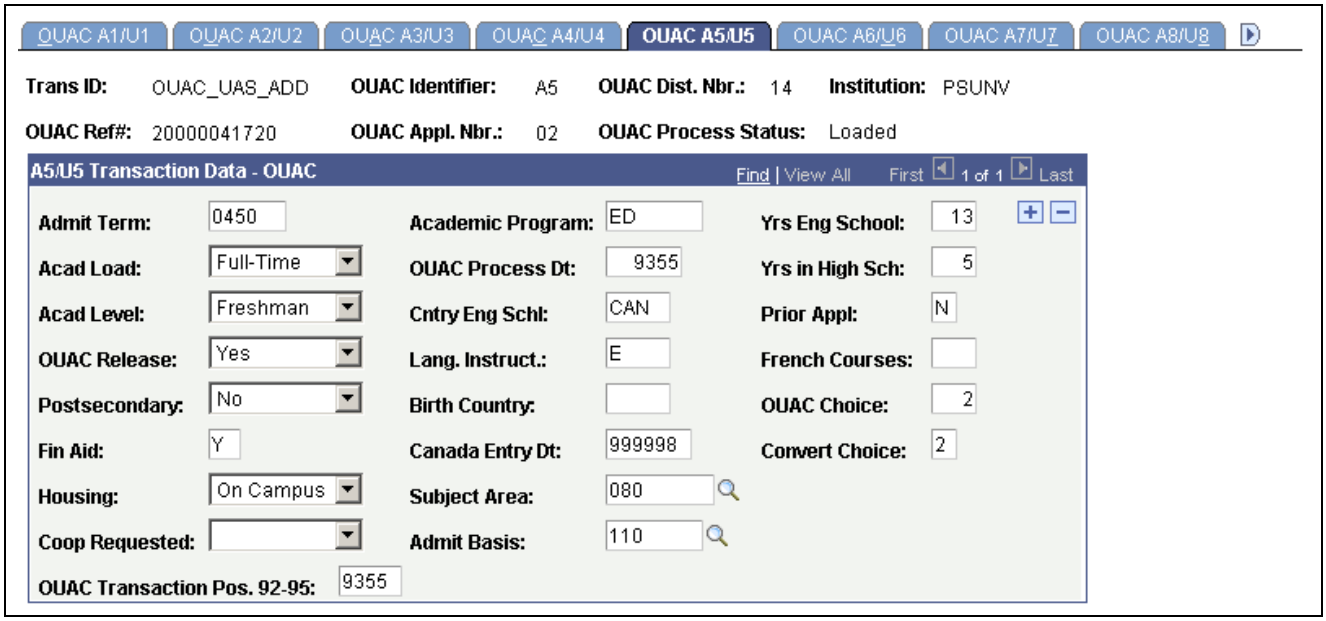
Access the OUAC A4/U4 page.



OUAC A4/U4 page

Reviewing OUAC Transactions A5/U5

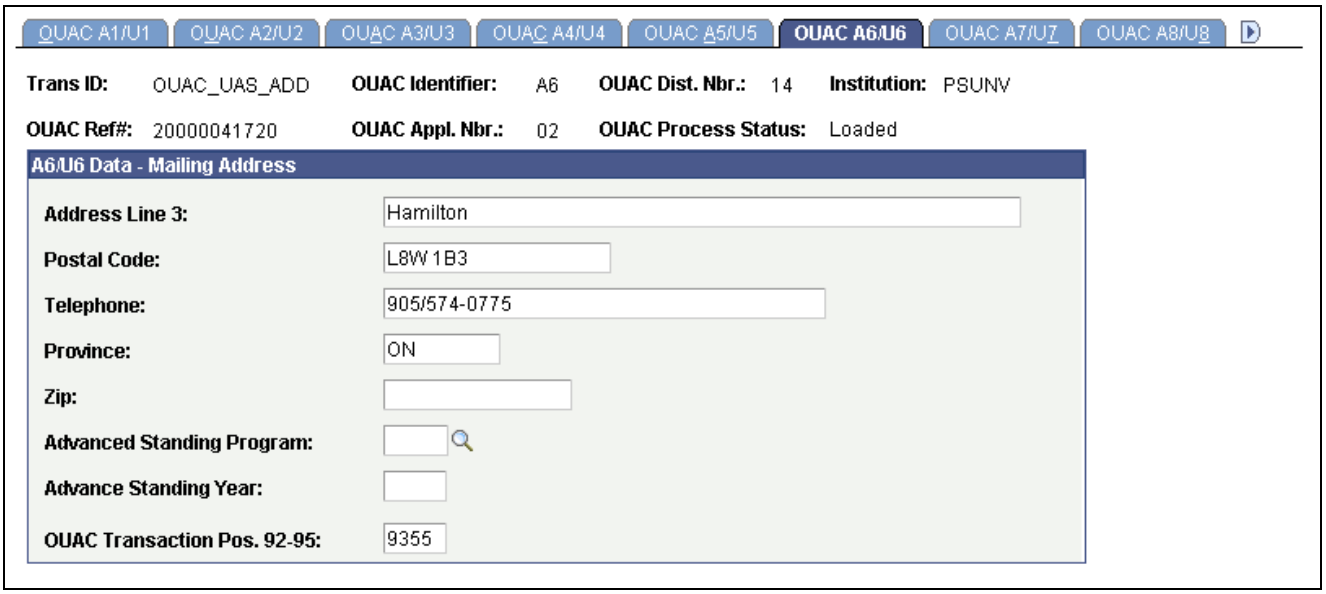
Access the OUAC A5/U5 page.



OUAC A5/U5 page

Reviewing OUAC Transactions A6/U6

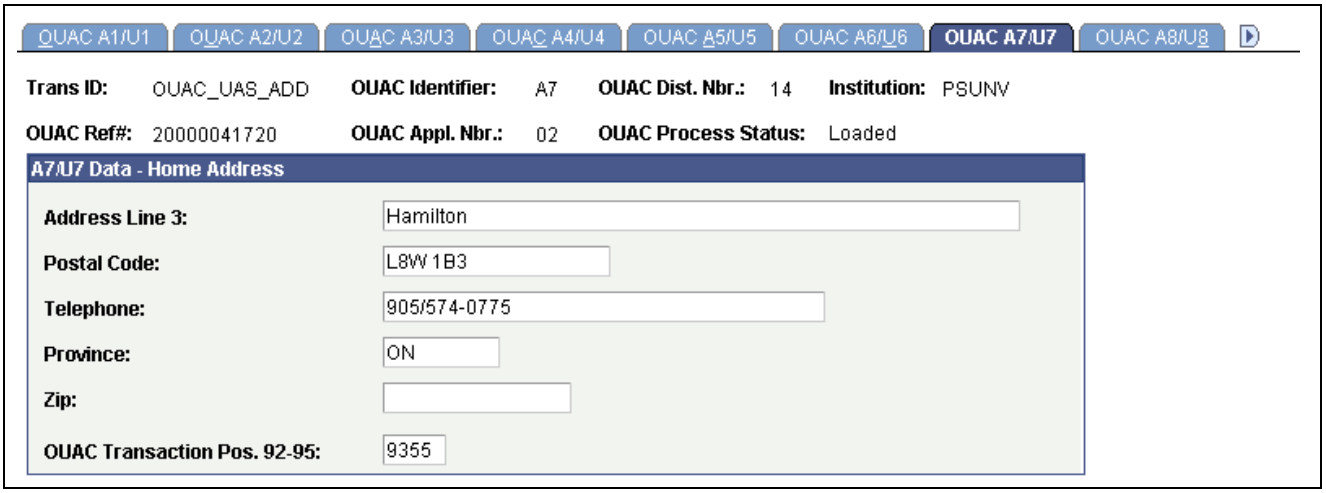
Access the OUAC A6/U6 page.



OUAC A6/U6 page

Reviewing OUAC Transactions A7/U7

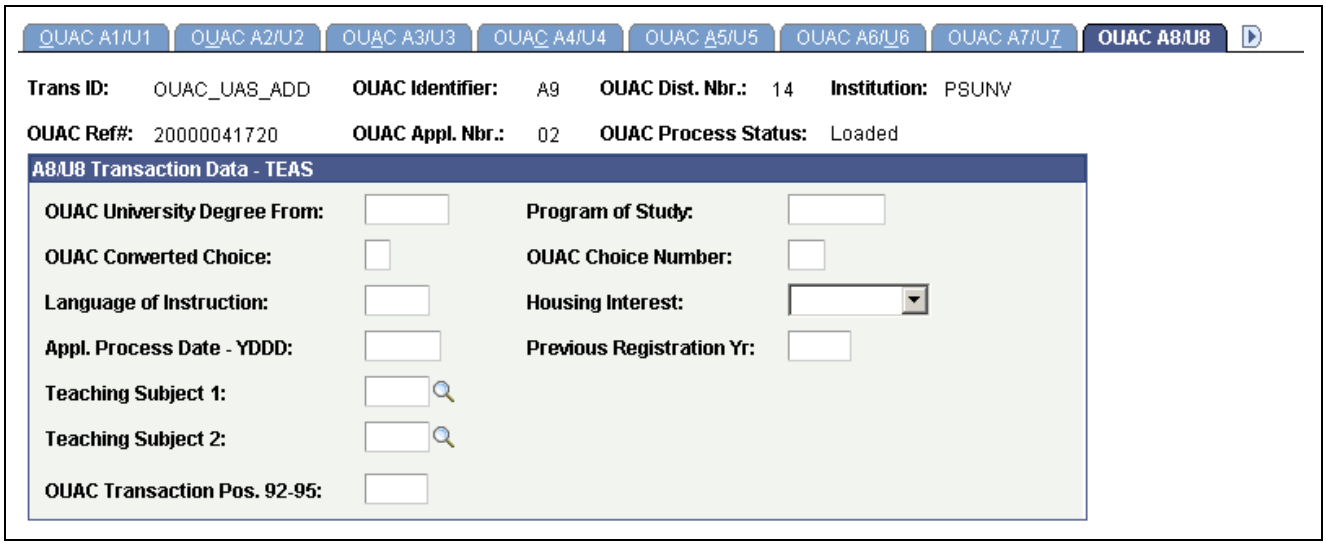
Access the OUAC A7/U7 page.



OUAC A7/U7 page

Reviewing OUAC Transactions A8/U8

Access the OUAC A8/U8 page.

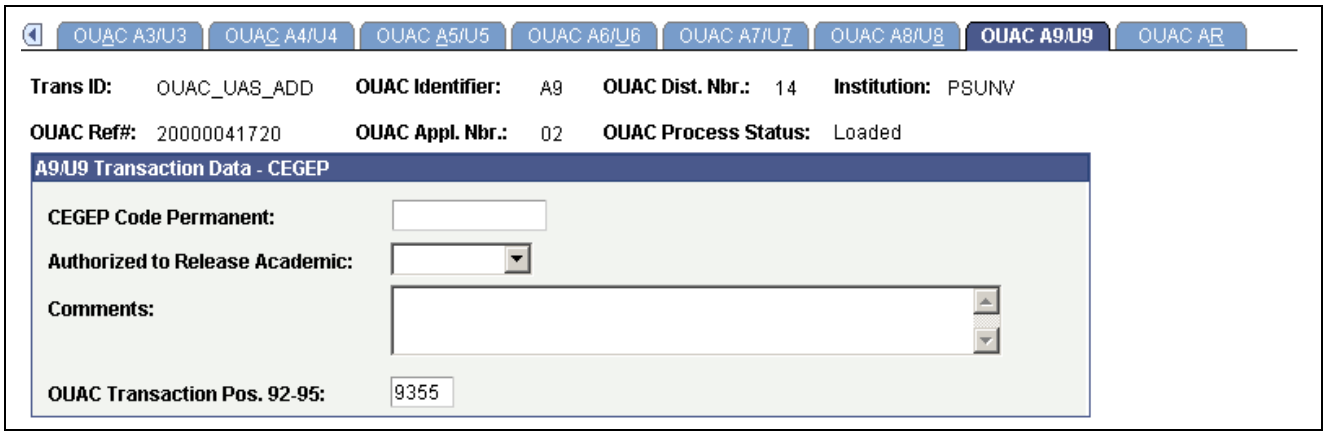


OUAC A8/U8 page

Define teaching subjects on the OUAC Teaching Subject Table page.

Reviewing OUAC Transactions A9/U9

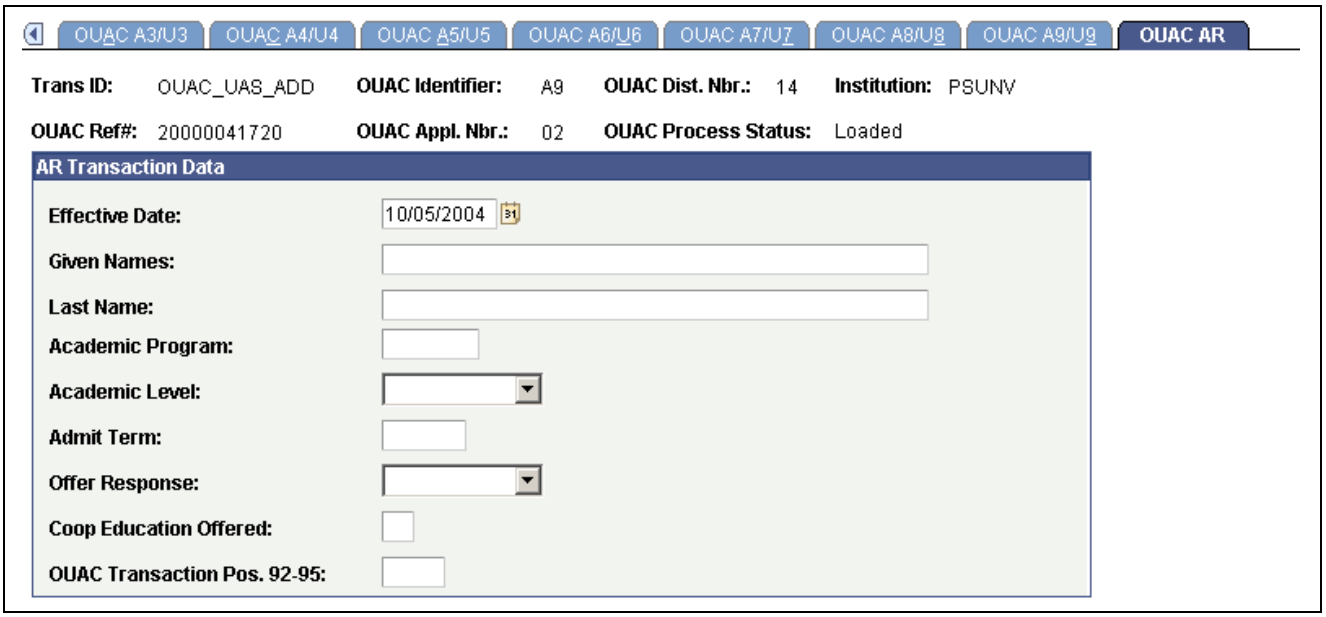
Access the OUAC A9/U9 page.



OUAC A9/U9 page

Reviewing OUAC Transactions AR

Access the OUAC AR page.



OUAC AR page

Reviewing and Editing the OUAC Transaction B5 Staging Tables

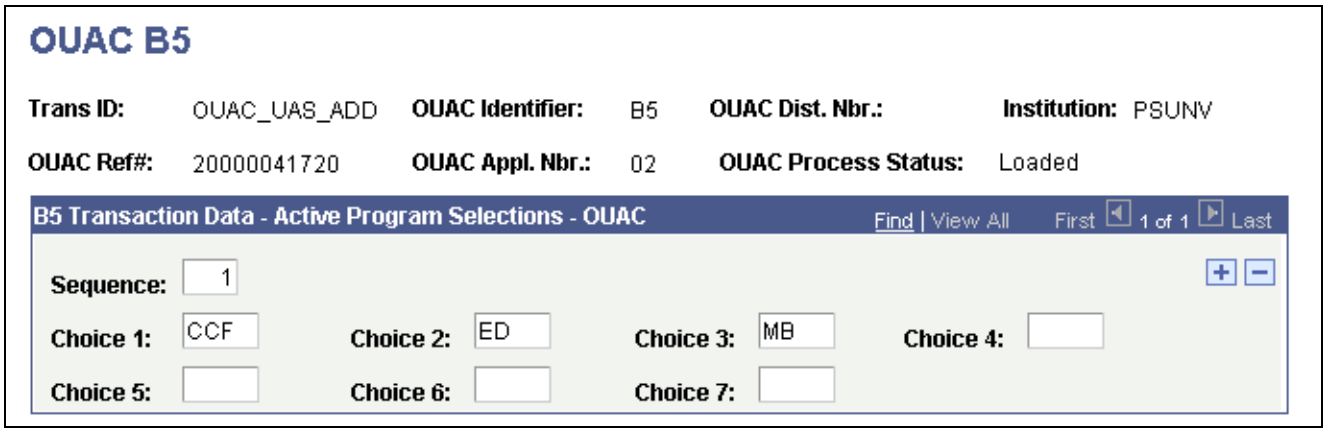
This section discusses how to use the OUAC B5 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction B5 Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC B5	OUAC_B5_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC B5	Review and edit OUAC transaction data.

Using the OUAC B5 Page

Access the OUAC B5 page.



OUAC B5 page

Reviewing and Editing the OUAC Transaction B/V-E Staging Tables

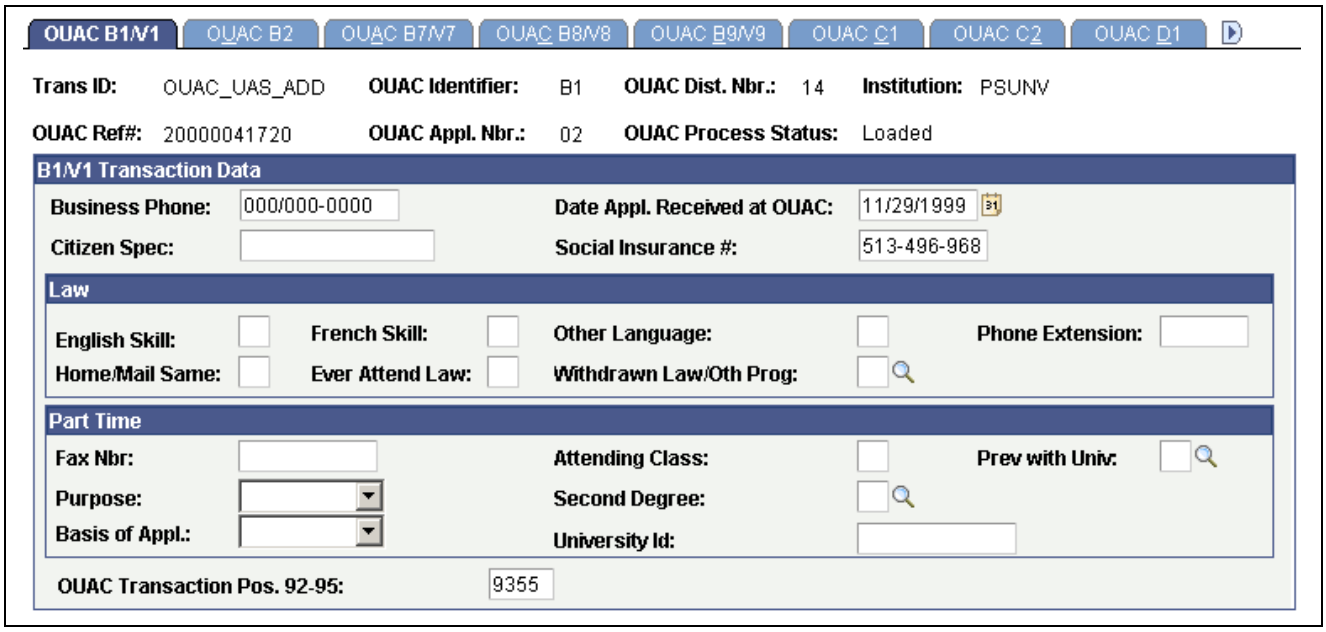
This section discusses how to use the OUAC Transactions B/V-E component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction B/V-E Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC B1/V1	OUAC_B1_V1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E	Review and edit OUAC transaction data.
OUAC B2	OUAC_B2_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B2	Review and edit OUAC transaction data.
OUAC B7/V7	OUAC_B7_V7_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B7/V7	Review and edit OUAC transaction data.
OUAC B8/V8	OUAC_B8_V8_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B8/V8	Review and edit OUAC transaction data.
OUAC B9/V9	OUAC_B9_V9_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B9/V9	Review and edit OUAC transaction data.
OUAC C1	OUAC_C1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C1	Review and edit OUAC transaction data.
OUAC C2	OUAC_C2_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C2	Review and edit OUAC transaction data.
OUAC D1	OUAC_D1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC D1	Review and edit OUAC transaction data.
OUAC E1	OUAC_E1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC E1	Review and edit OUAC transaction data.

Reviewing OUAC Transactions B1/V1

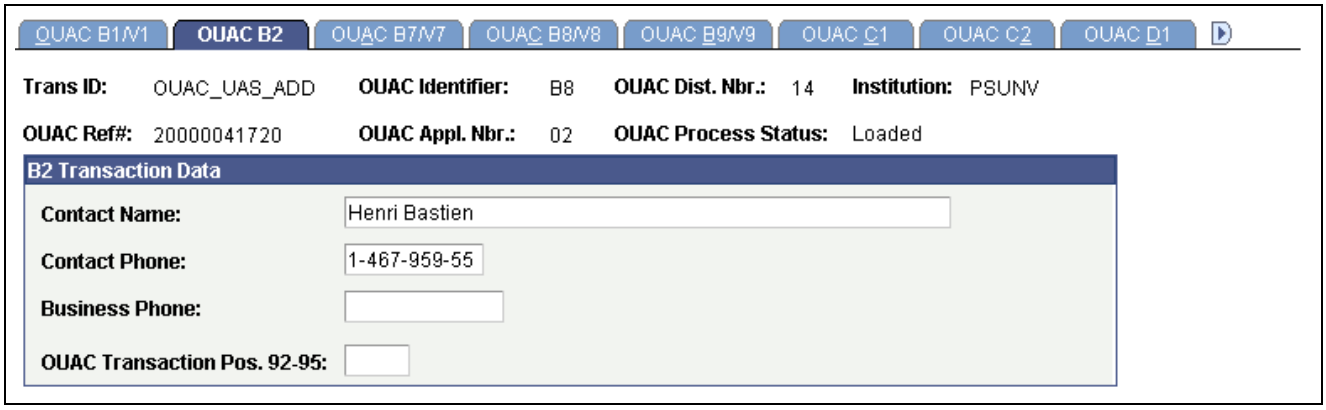
Access the OUAC B1/V1 page.



OUAC B1/V1 page

Reviewing OUAC Transactions B2

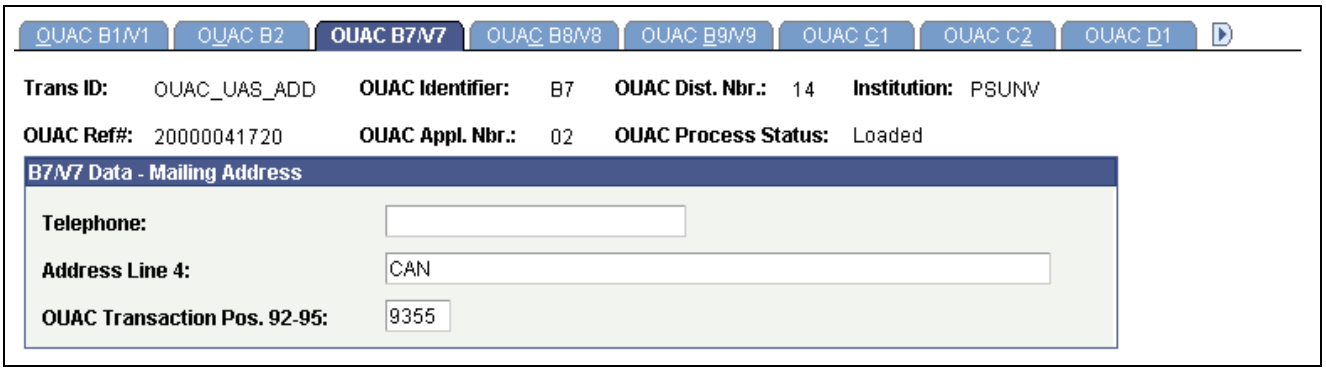
Access the OUAC B2 page.



OUAC B2 page

Reviewing OUAC Transactions B7/V7

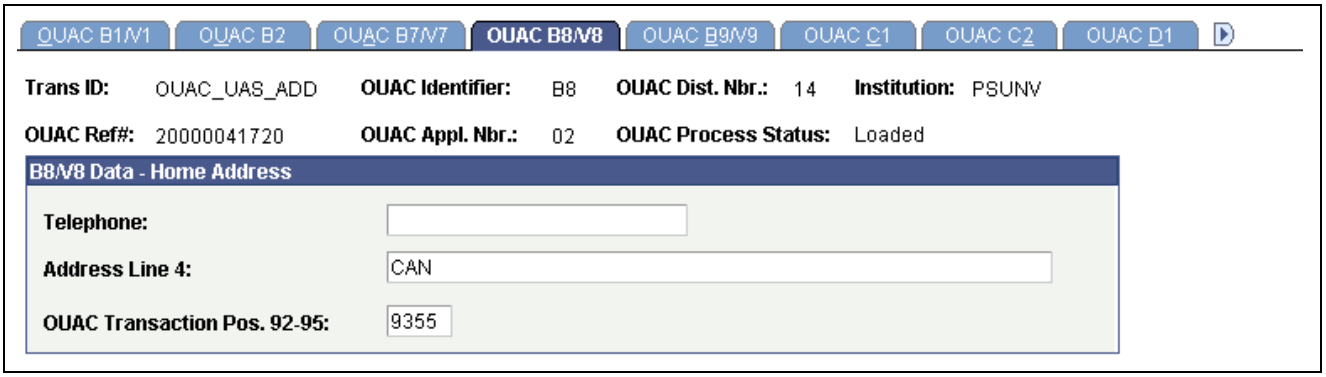
Access the OUAC B7/V7 page.



OUAC B7/V7 page

Reviewing OUAC Transactions B8/V8

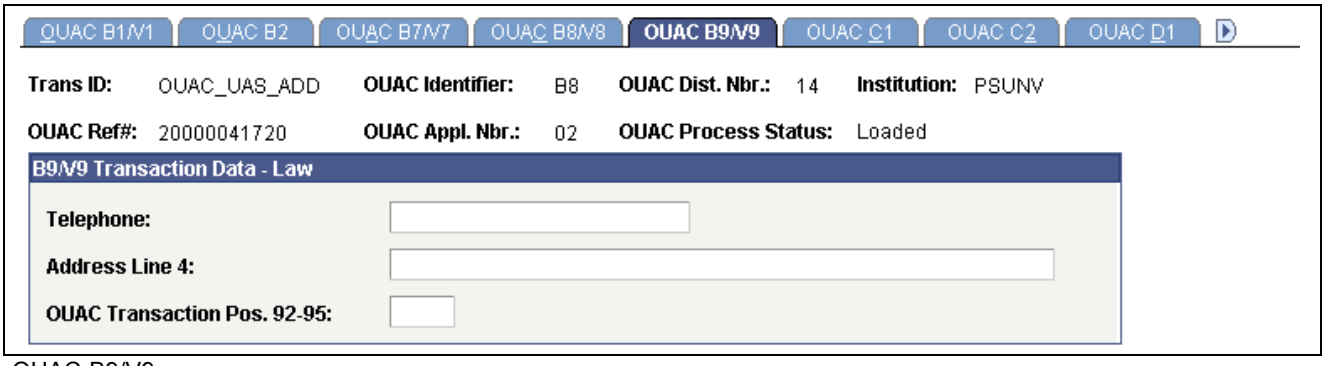
Access the OUAC B8/V8 page.



OUAC B8/V8 page

Reviewing OUAC Transactions B9/V9

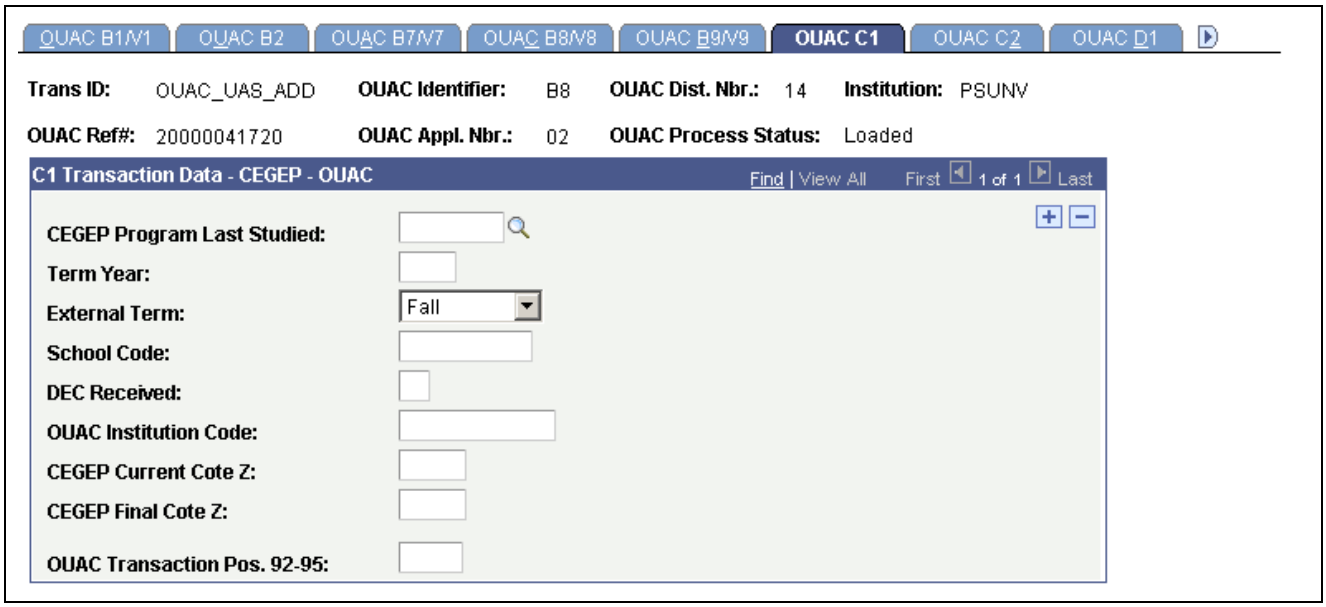
Access the OUAC B9/V9 page.



OUAC B9/V9 page

Reviewing OUAC Transactions C1

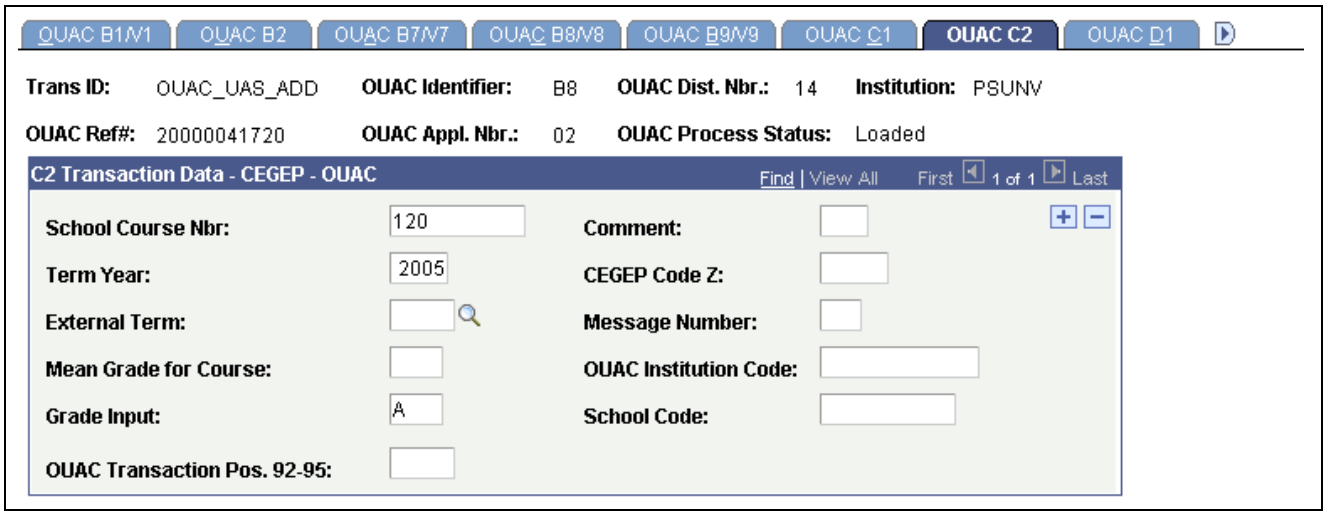
Access the OUAC C1 page.



OUAC C1 page

Reviewing OUAC Transactions C2

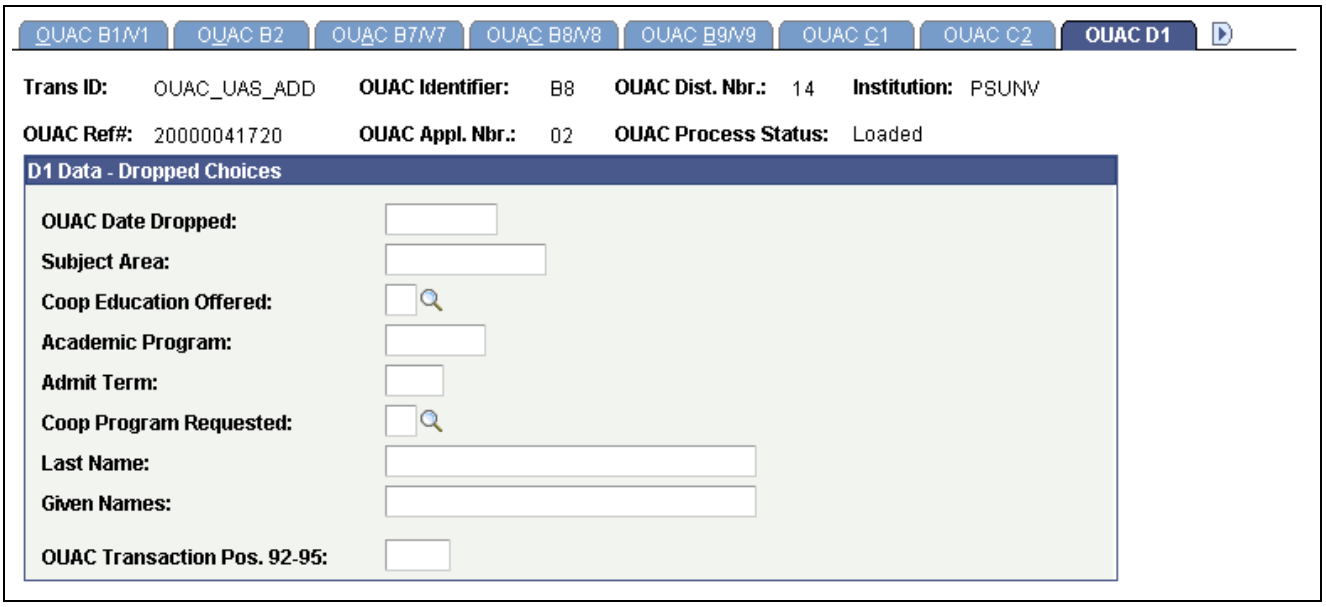
Access the OUAC C2 page.



OUAC C2 page

Reviewing OUAC Transactions D1

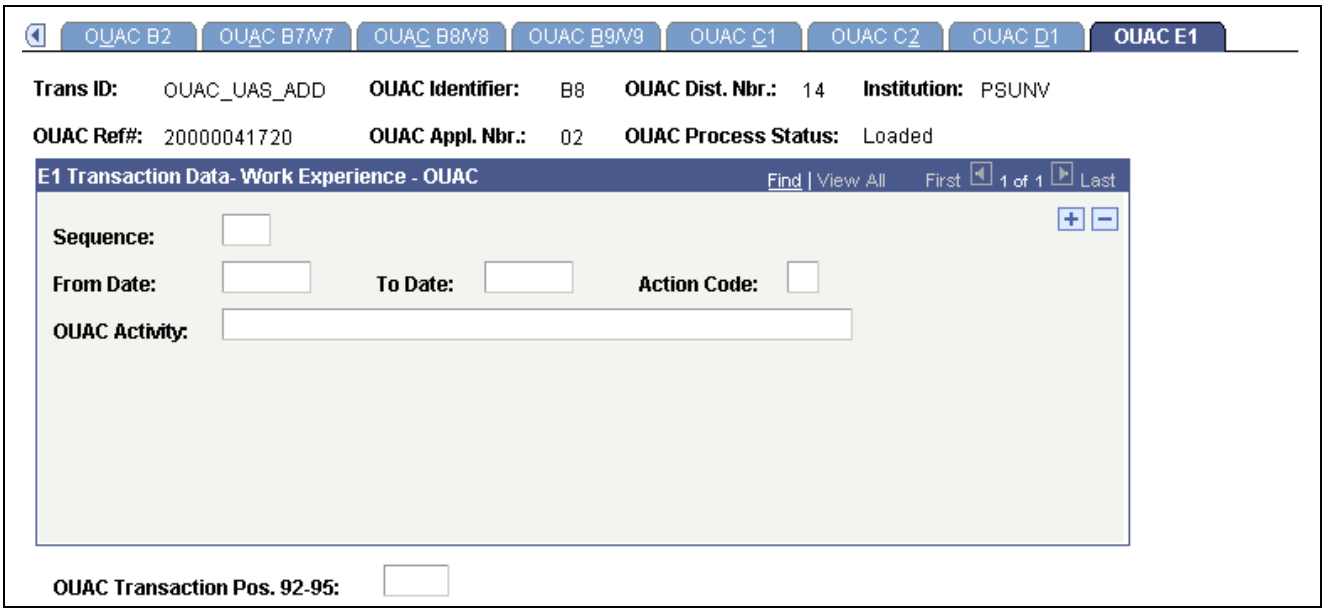
Access the OUAC D1 page.



OUAC D1 page

Reviewing OUAC Transactions E1

Access the OUAC E1 page.



OUAC E1 page

Reviewing and Editing the OUAC Transaction F Staging Tables

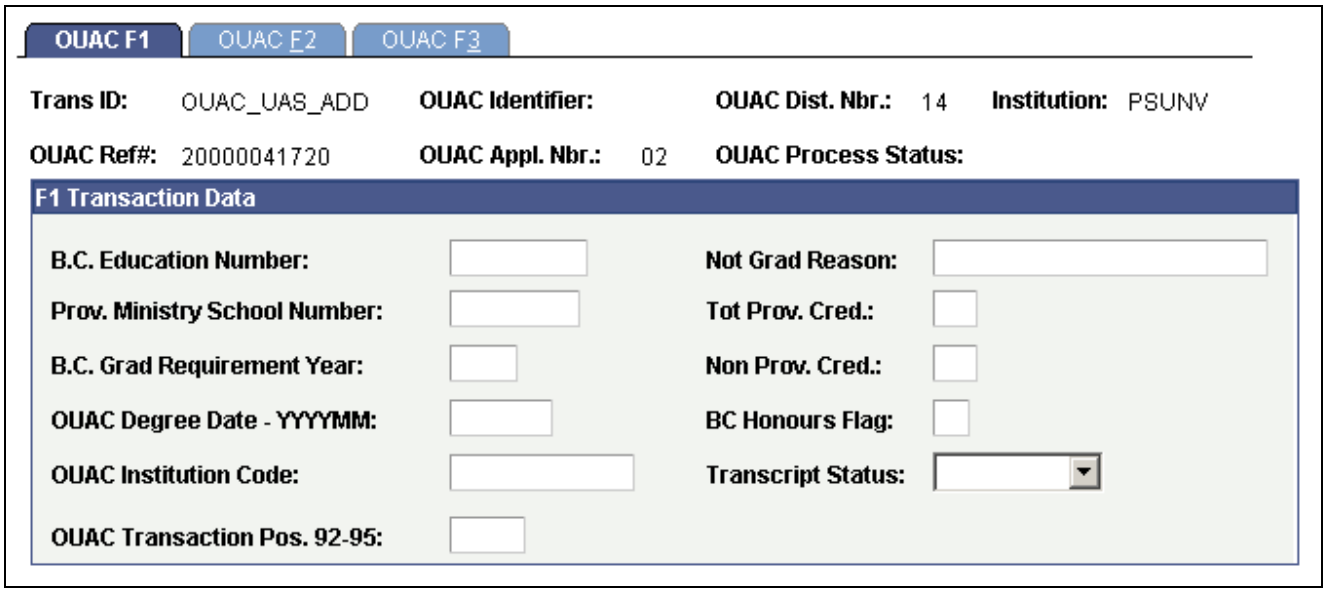
This section discusses how to use the OUAC Transactions F component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction F Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC F1	OUAC_F1_PNL	Student Admissions, OUAC, Transactions, Transactions F	Review and edit OUAC transaction data.
OUAC F2	OUAC_F2_PNL	Student Admissions, OUAC, Transactions, Transactions F, OUAC F2	Review and edit OUAC transaction data.
OUAC F3	OUAC_F3_PNL	Student Admissions, OUAC, Transactions, Transactions F, OUAC F3	Review and edit OUAC transaction data.

Reviewing OUAC Transactions F1

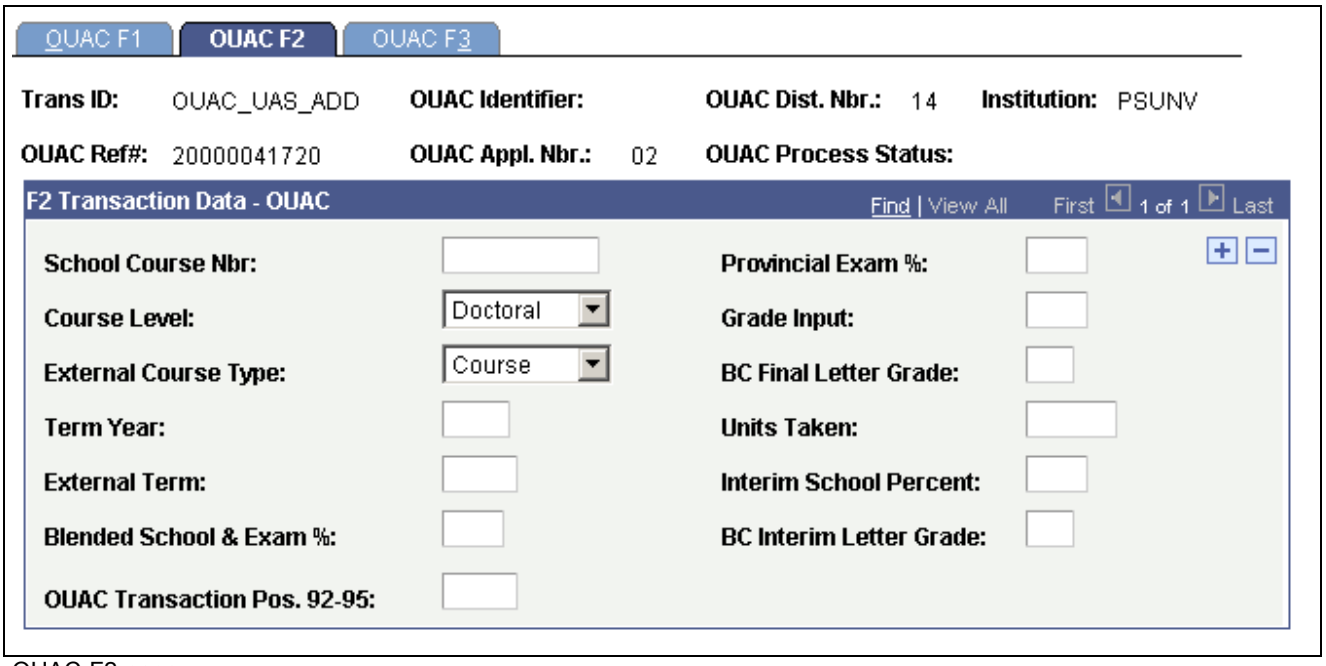
Access the OUAC F1 page.



OUAC F1 page

Reviewing OUAC Transactions F2

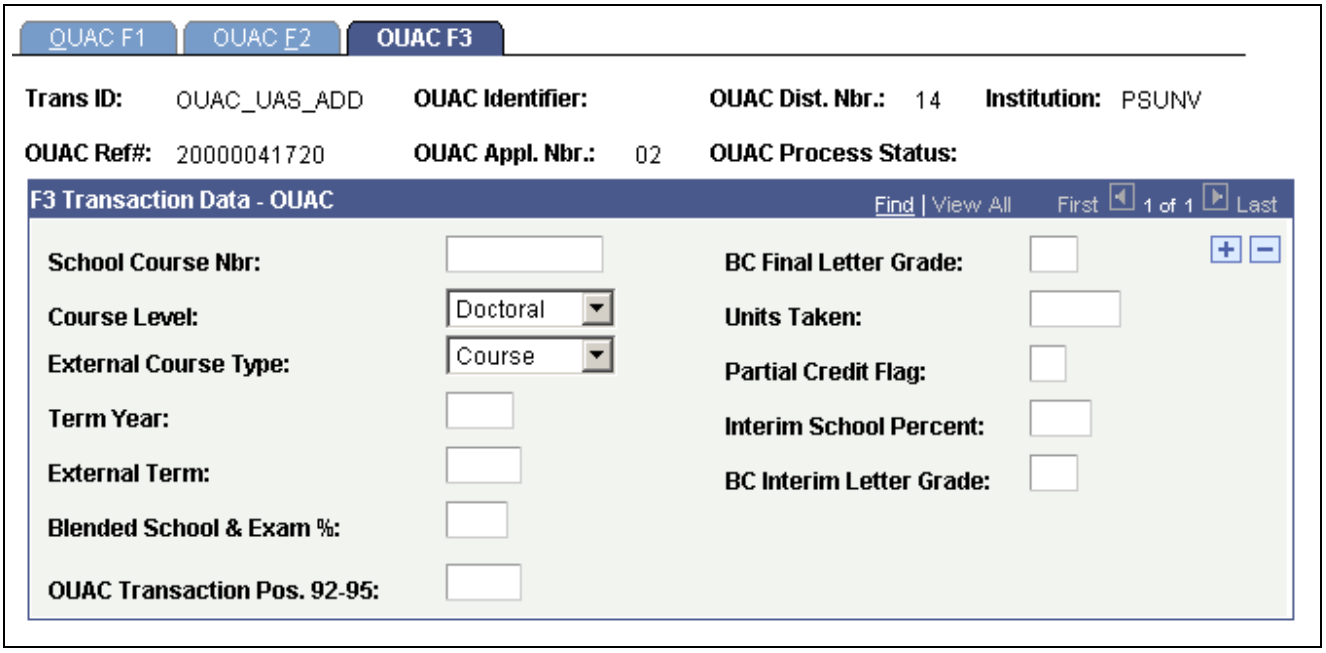
Access the OUAC F2 page.



OUAC F2 page

Reviewing OUAC Transactions F3

Access the OUAC F3 page.



OUAC F3 page

Reviewing and Editing the OUAC Transaction G/H Staging Tables

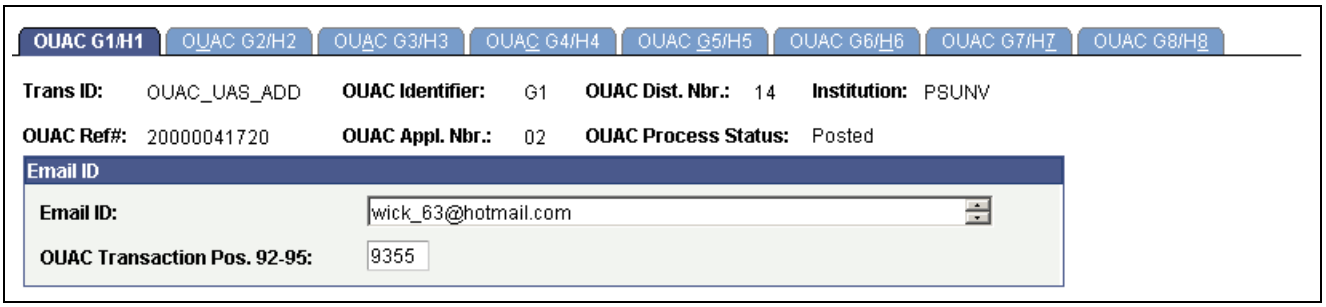
This section discusses how to use the OUAC Transactions G/H component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction G/H Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC G1/H1	OUAC_G1_H1_PNL	Student Admissions, OUAC, Transactions, Transactions G/H	Review and edit OUAC transaction data.
OUAC G2/H2	OUAC_G2_H2_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G2/H2	Review and edit OUAC transaction data.
OUAC G3/H3	OUAC_G3_H3_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G3/H3	Review and edit OUAC transaction data.
OUAC G4/H4	OUAC_G4_H4_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G4/H4	Review and edit OUAC transaction data.
OUAC G5/H5	OUAC_G5_H5_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G5/H5	Review and edit OUAC transaction data.
OUAC G6/H6	OUAC_G6_H6_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G6/H6	Review and edit OUAC transaction data.
OUAC G7/H7	OUAC_G7_H7_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G7/H7	Review and edit OUAC transaction data.
OUAC G8/H8	OUAC_G8_H8_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G8/H8	Review and edit OUAC transaction data.

Reviewing OUAC Transactions G1/H1

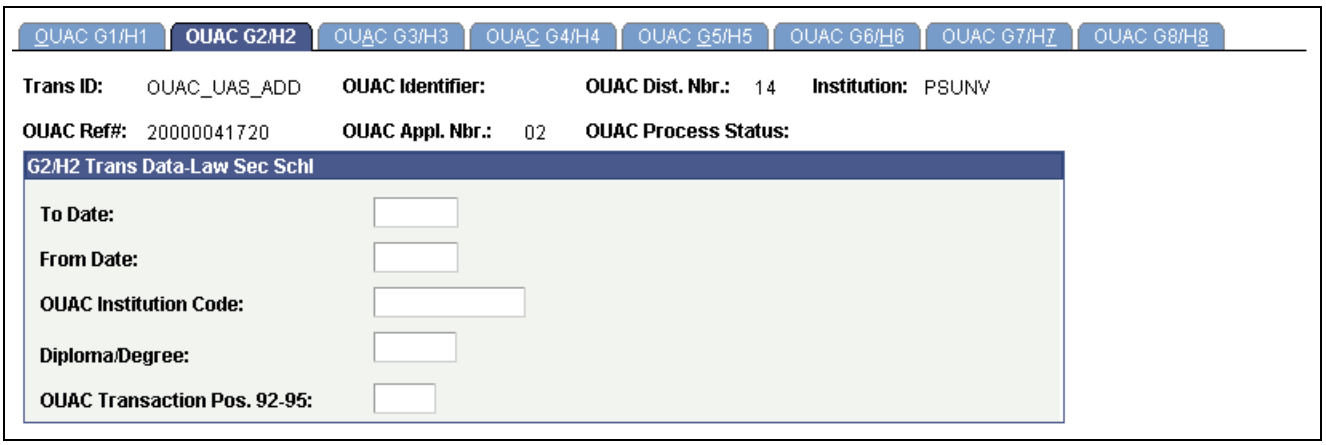
Access the OUAC G1/H1 page.



OUAC G1/H1 page

Reviewing OUAC Transactions G2/H2

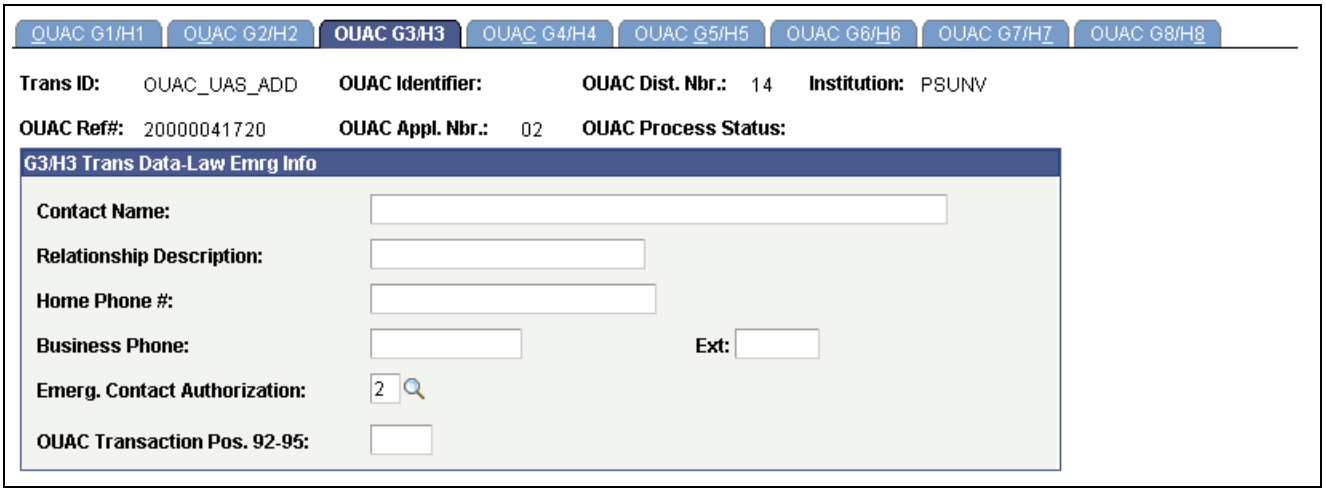
Access the OUAC G2/H2 page.



OUAC G2/H2 page

Reviewing OUAC Transactions G3/H3

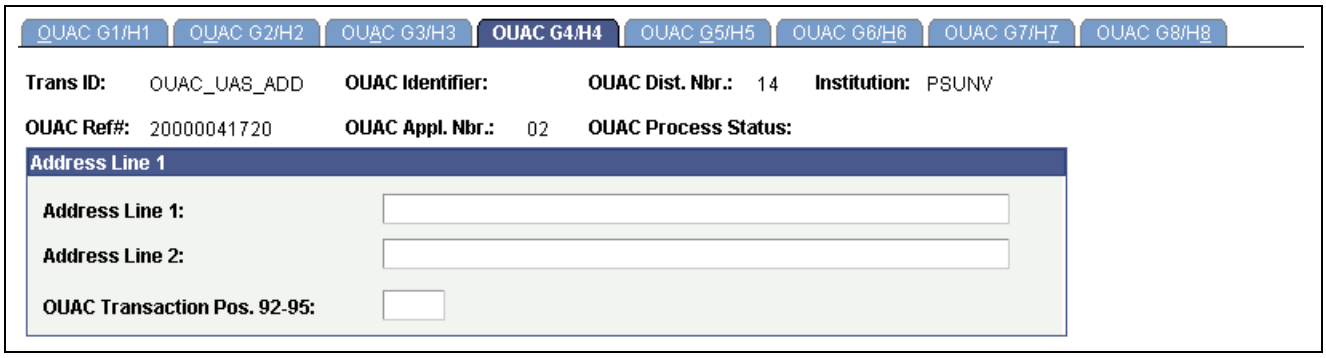
Access the OUAC G3/H3 page.



OUAC G3/H3 page

Reviewing OUAC Transactions G4/H4

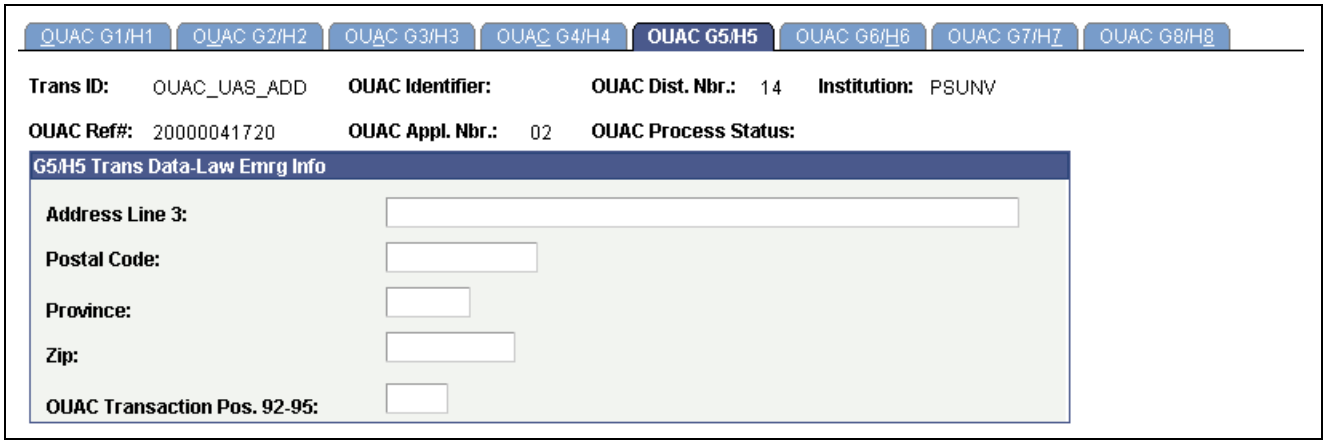
Access the OUAC G4/H4 page.



OUAC G4/H4 page

Reviewing OUAC Transactions G5/H5

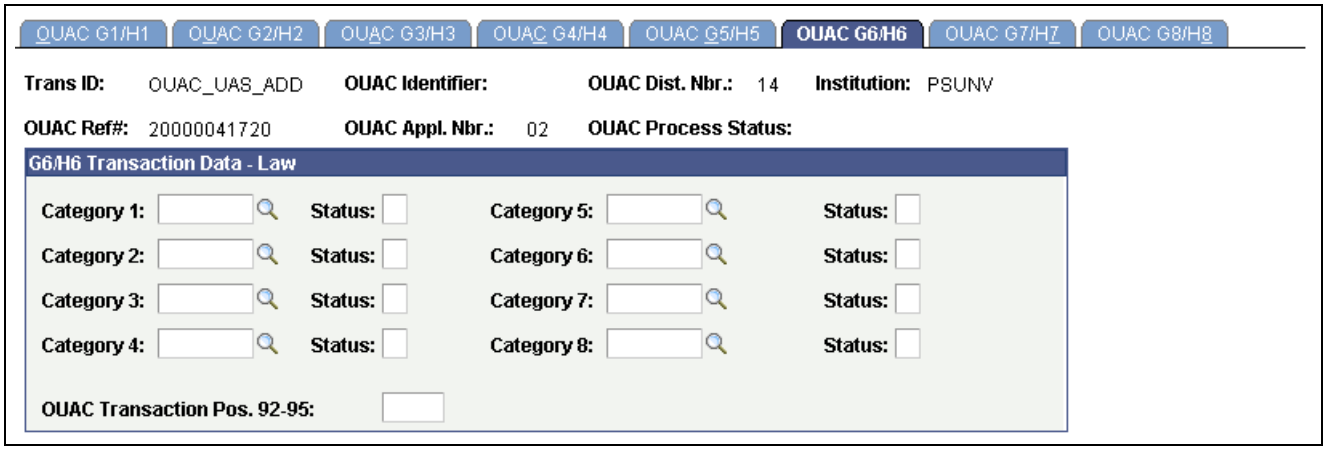
Access the OUAC G5/H5 page.



OUAC G5/H5 page

Reviewing OUAC Transactions G6/H6

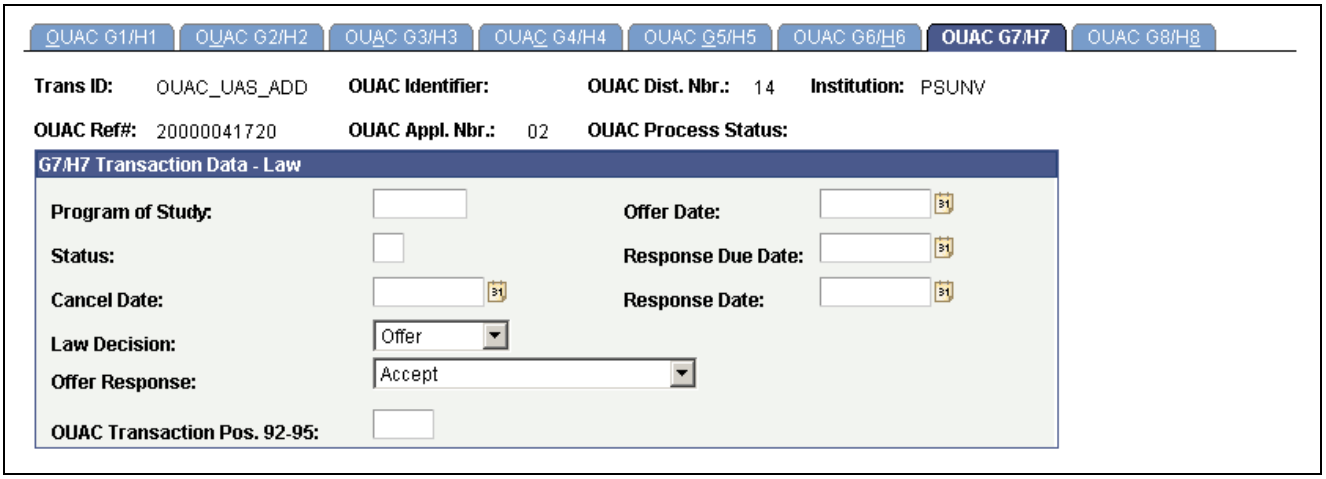
Access the OUAC G6/H6 page.



OUAC G6/H6 page

Reviewing OUAC Transactions G7/H7

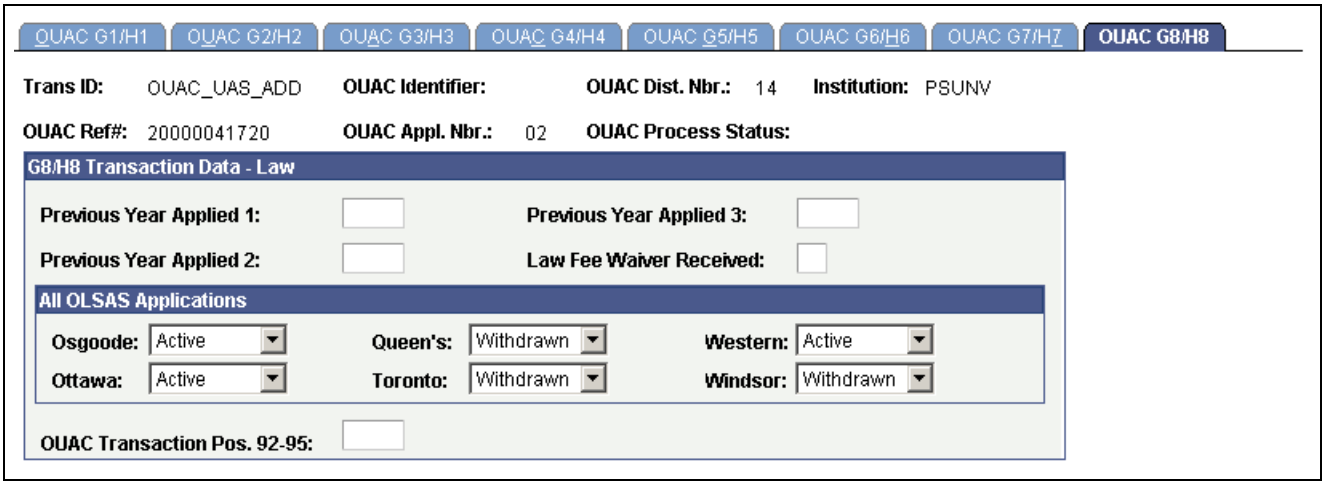
Access the OUAC G7/H7 page.



OUAC G7/H7 page

Reviewing OUAC Transactions G8/H8

Access the OUAC G8/H8 page.



OUAC G8/H8 page

Reviewing and Editing the OUAC Transaction J-N Staging Tables

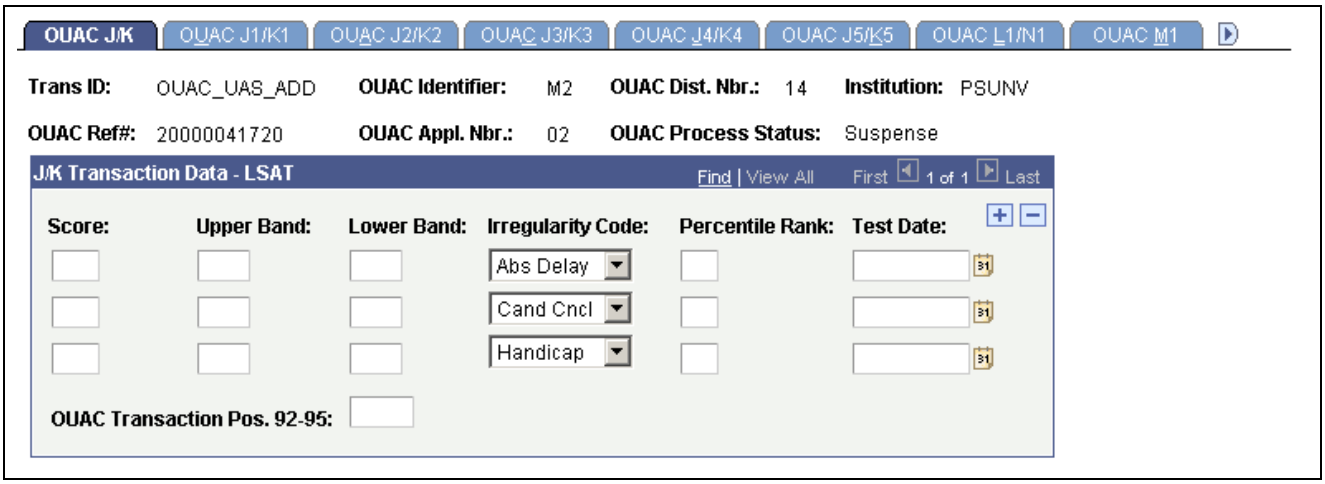
This section discusses how to use the OUAC Transactions J-N component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction J-N Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC J/K	OUAC_J_K_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J/K	Review and edit OUAC transaction data.
OUAC J1/K1	OUAC_J1_K1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J1/K1	Review and edit OUAC transaction data.
OUAC J2/K2	OUAC_J2_K2_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J2/K2	Review and edit OUAC transaction data.
OUAC J3/K3	OUAC_J3_K3_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J3/K3	Review and edit OUAC transaction data.
OUAC J4/K4	OUAC_J4_K4_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J4/K4	Review and edit OUAC transaction data.
OUAC J5/K5	OUAC_J5_K5_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J5/K5	Review and edit OUAC transaction data.
OUAC L1/N1	OUAC_L1_N1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC L1/N1	Review and edit OUAC transaction data.
OUAC M1	OUAC_M1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M1	Review and edit OUAC transaction data.
OUAC M2	OUAC_M2_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M2	Review and edit OUAC transaction data.

Reviewing OUAC Transactions J/K

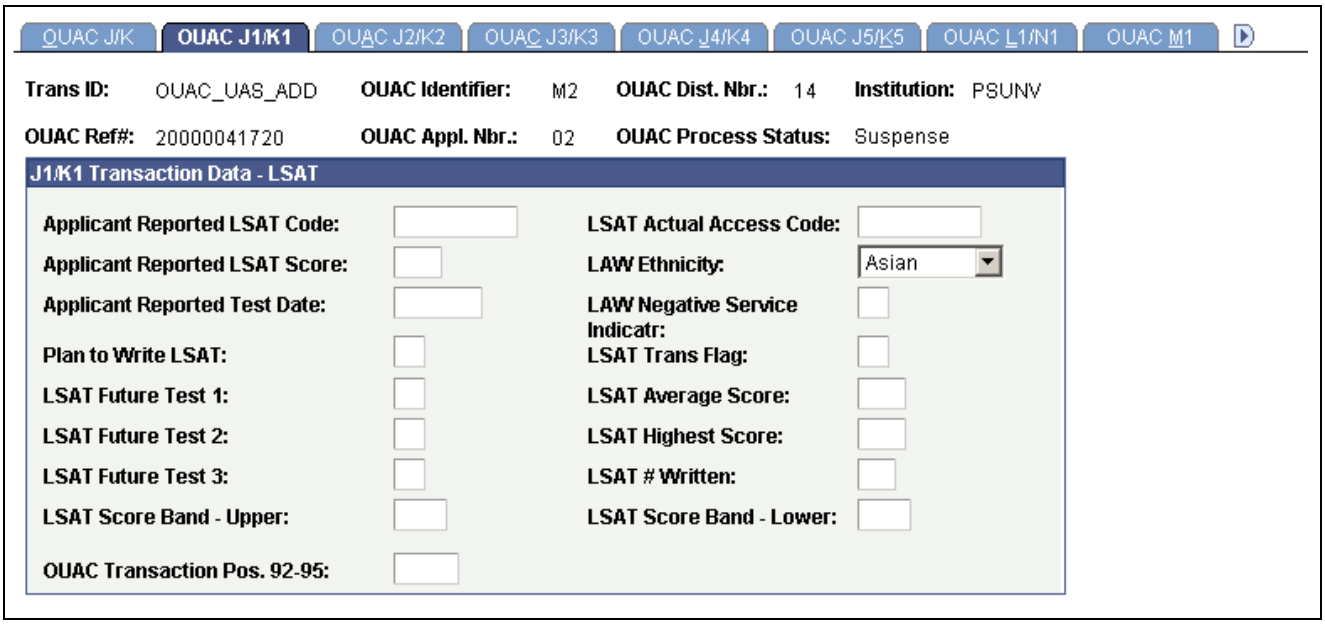
Access the OUAC J/K page.



OUAC J/K page

Reviewing OUAC Transactions J1/K1

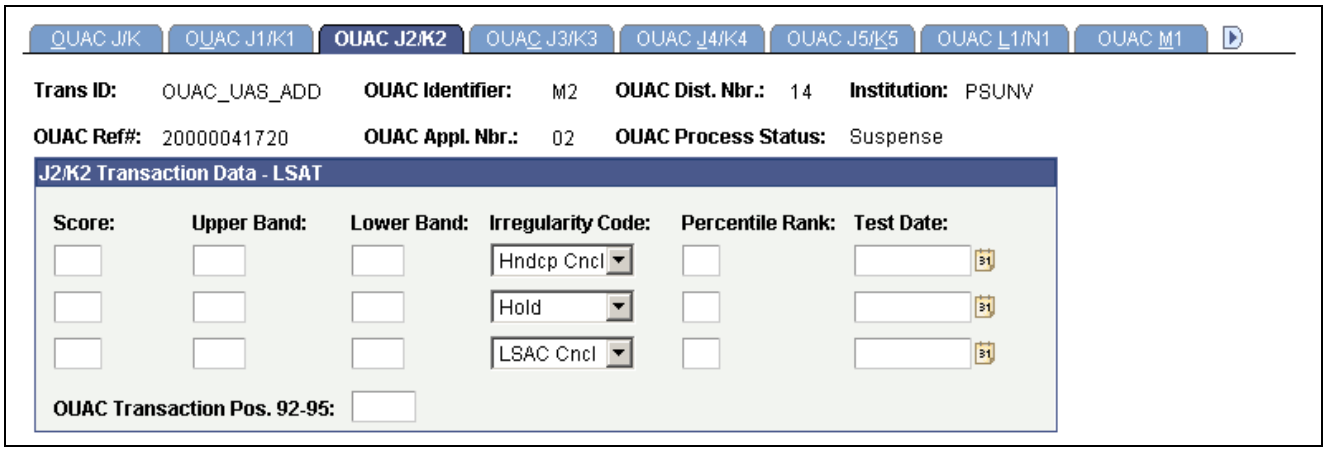
Access the OUAC J1/K1 page.



OUAC J1/K1 page

Reviewing OUAC Transactions J2/K2

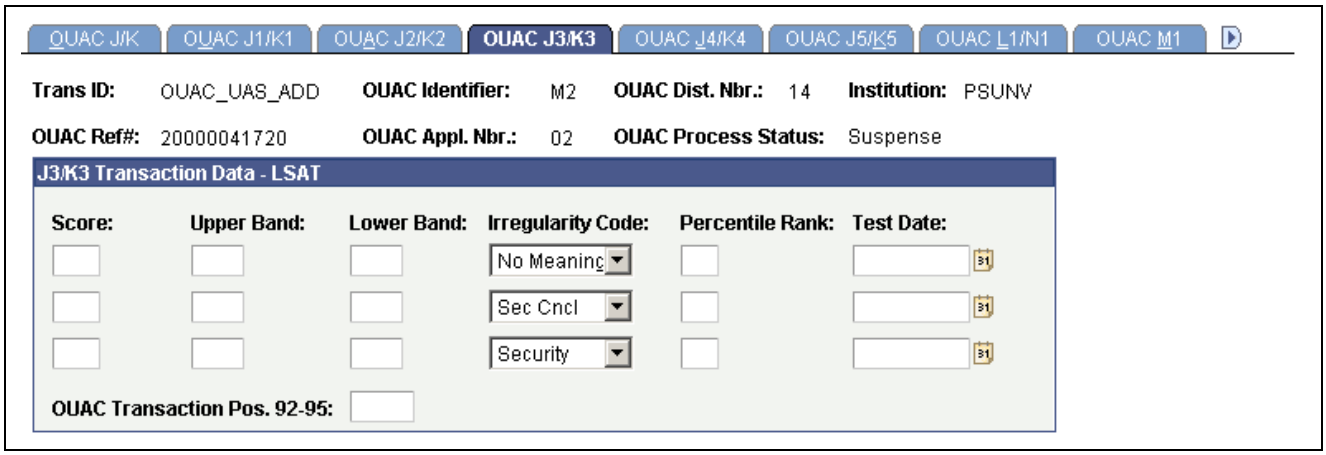
Access the OUAC J2/K2 page.



OUAC J2/K2 page

Reviewing OUAC Transactions J3/K3

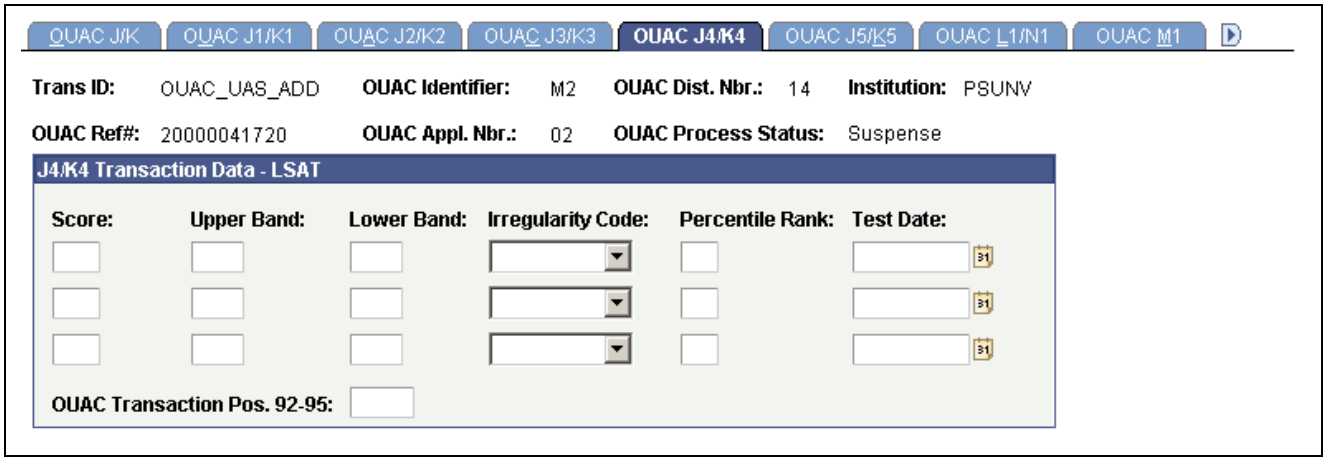
Access the OUAC J3/K3 page.



OUAC J3/K3 page

Reviewing OUAC Transactions J4/K4

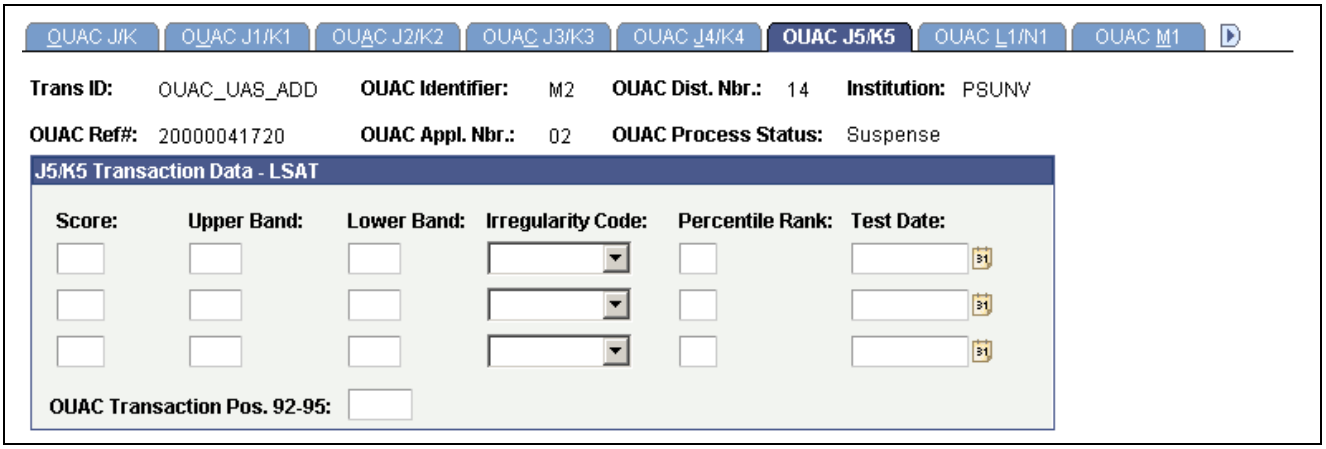
Access the OUAC J4/K4 page.



OUAC J4/K4 page

Reviewing OUAC Transactions J5/K5

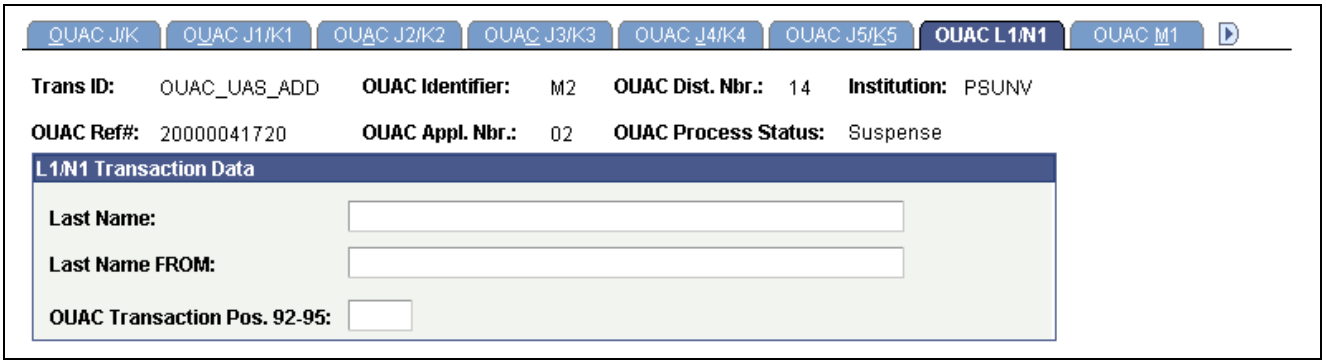
Access the OUAC J5/K5 page.



OUAC J5/K5 page

Reviewing OUAC Transactions L1/N1

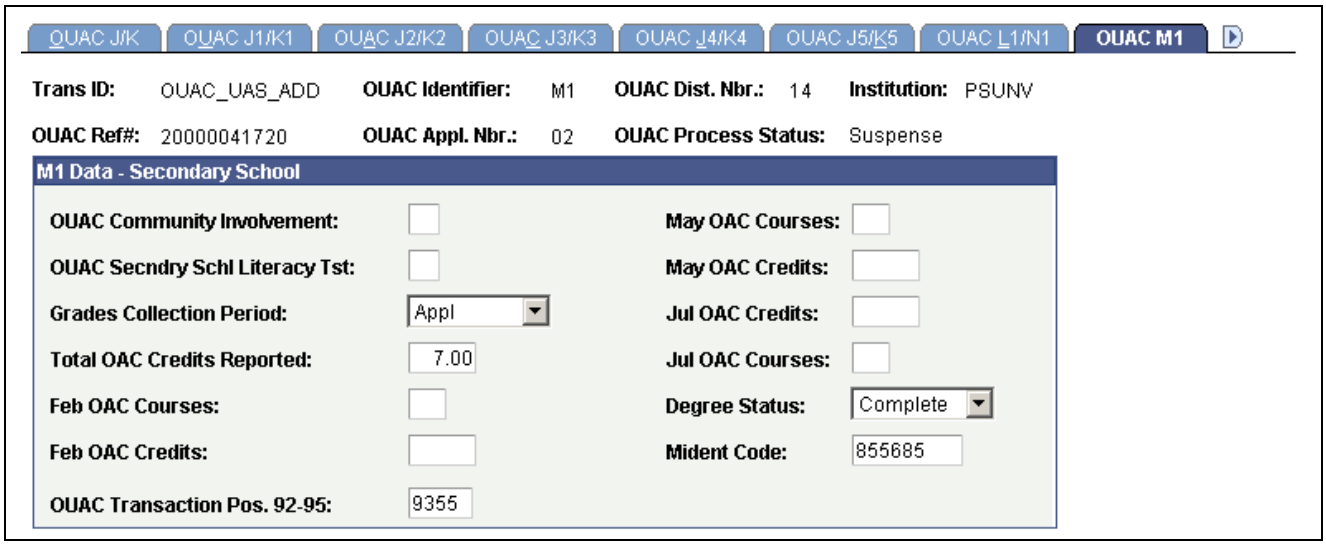
Access the OUAC L1/N1 page.



OUAC L1/N1 page

Reviewing OUAC Transactions M1

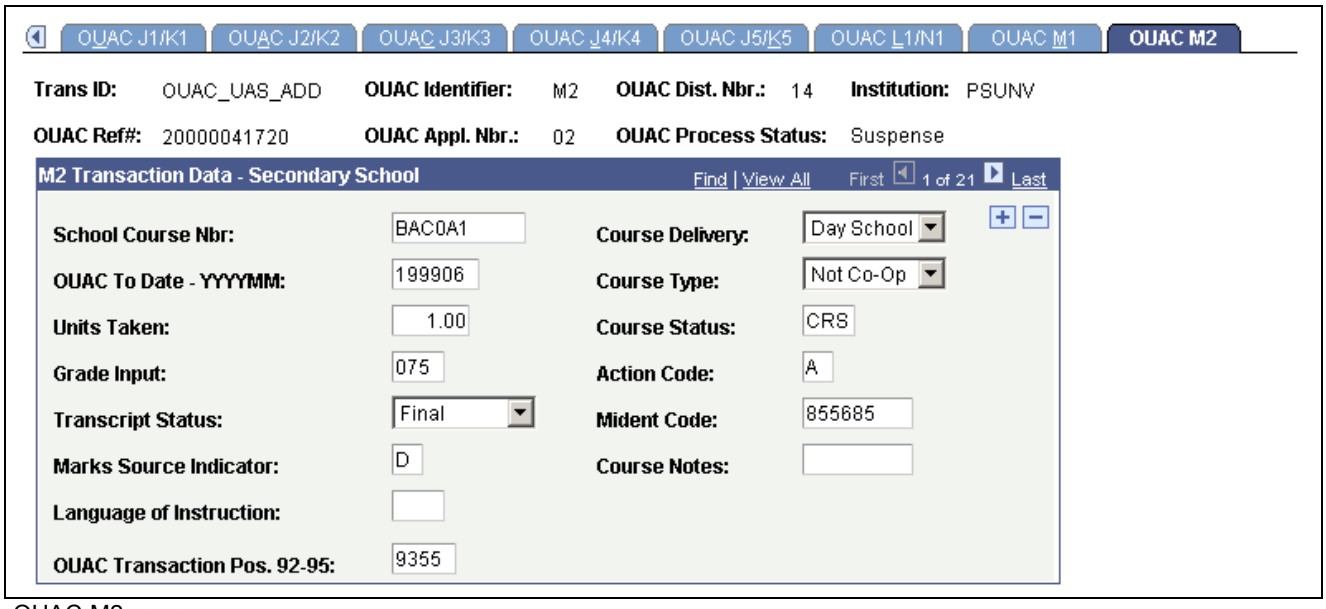
Access the OUAC M1 page.



OUAC M1 page

Reviewing OUAC Transactions M2

Access the OUAC M2 page.



OUAC M2 page

Reviewing and Editing the OUAC Transaction P-R Staging Tables

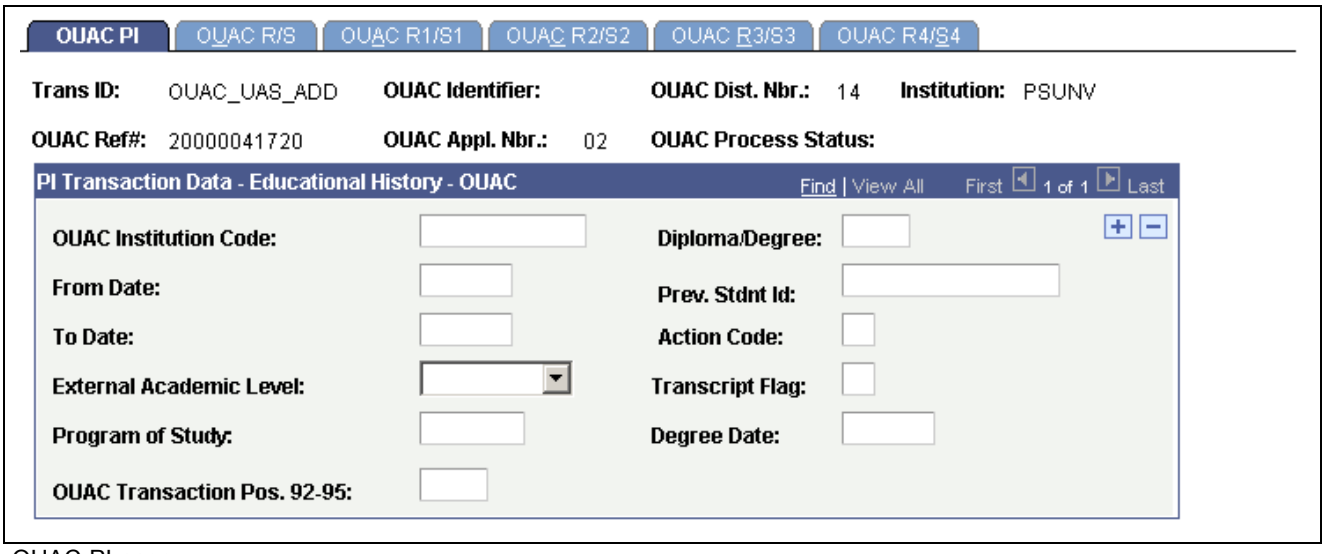
This section discusses how to use the OUAC Transactions P-R component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction P-R Staging Tables

Page Name	Object Name	Navigation	Usage
OUAC PI	OUAC_PI_PNL	Student Admissions, OUAC, Transactions, Transaction P- R	Review and edit OUAC transaction data.
OUAC R/S	OUAC_R_S_PNL	Student Admissions, OUAC, Transactions, Transaction P-R, OUAC R/S	Review and edit OUAC transaction data.
OUAC R1/S1	OUAC_R1_S1_PNL	Student Admissions, OUAC, Transactions, Transaction P-R, OUAC R1/S1	Review and edit OUAC transaction data.
OUAC R2/S2	OUAC_R2_S2_PNL	Student Admissions, OUAC, Transactions, Transaction P-R, OUAC R2/S2	Review and edit OUAC transaction data.
OUAC R3/S3	OUAC_R3_S3_PNL	Student Admissions, OUAC, Transactions, Transaction P-R, OUAC R3/S3	Review and edit OUAC transaction data.
OUAC R4/S4	OUAC_R4_S4_PNL	Student Admissions, OUAC, Transactions, Transaction P-R, OUAC R4/S4	Review and edit OUAC transaction data.

Reviewing OUAC Transactions PI

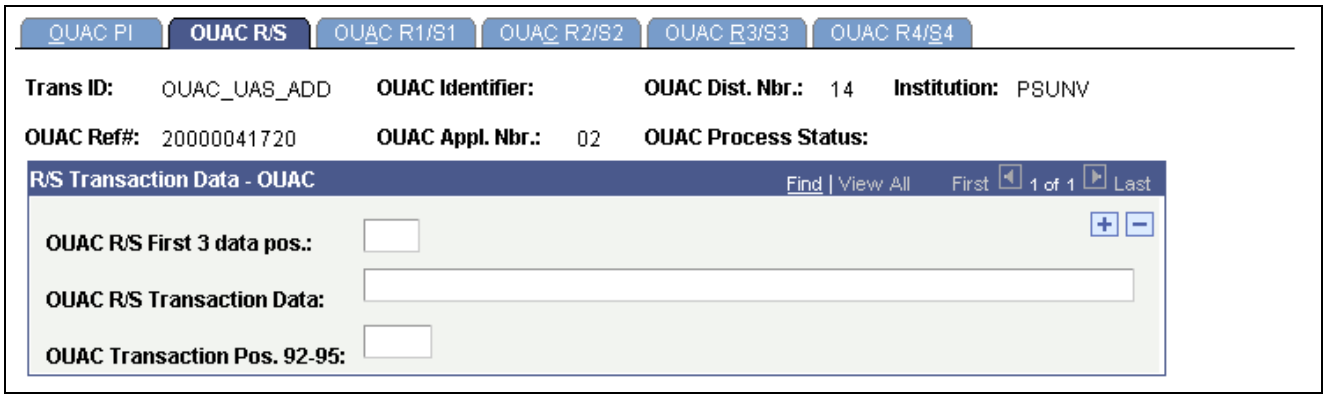
Access the OUAC PI page.



OUAC PI page

Reviewing OUAC Transactions R/S

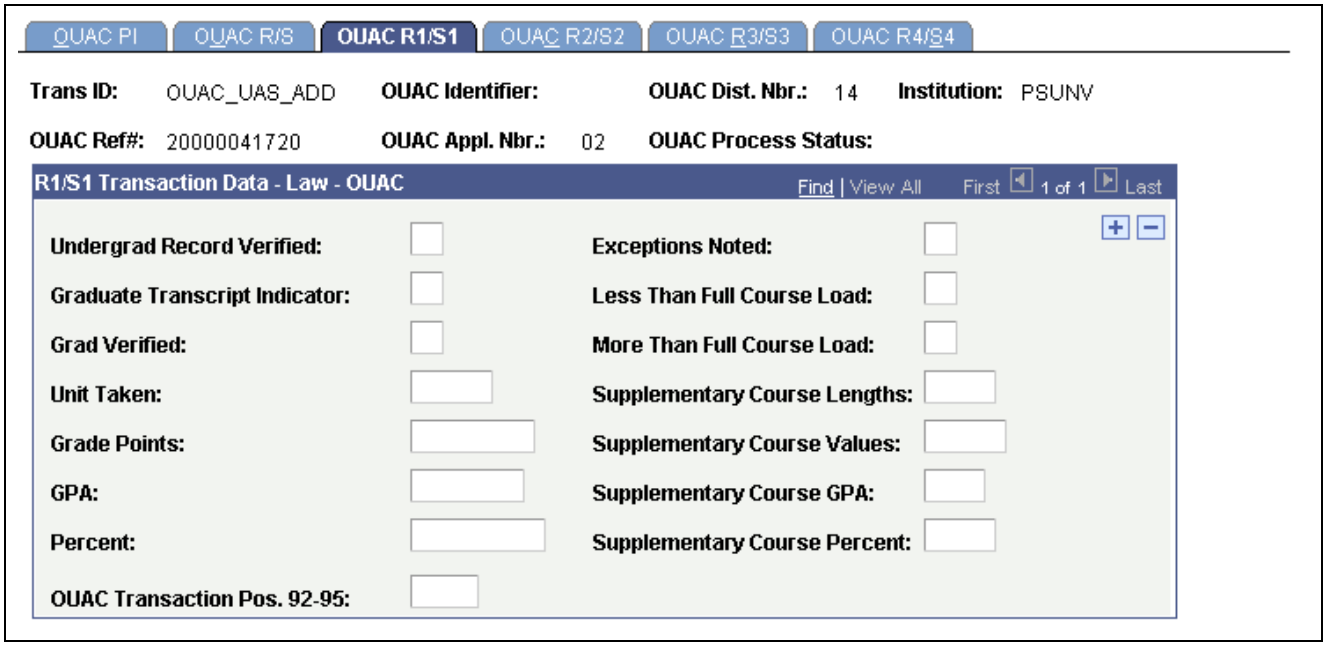
Access the OUAC R/S page.



OUAC R/S page

Reviewing OUAC Transactions R1/S1

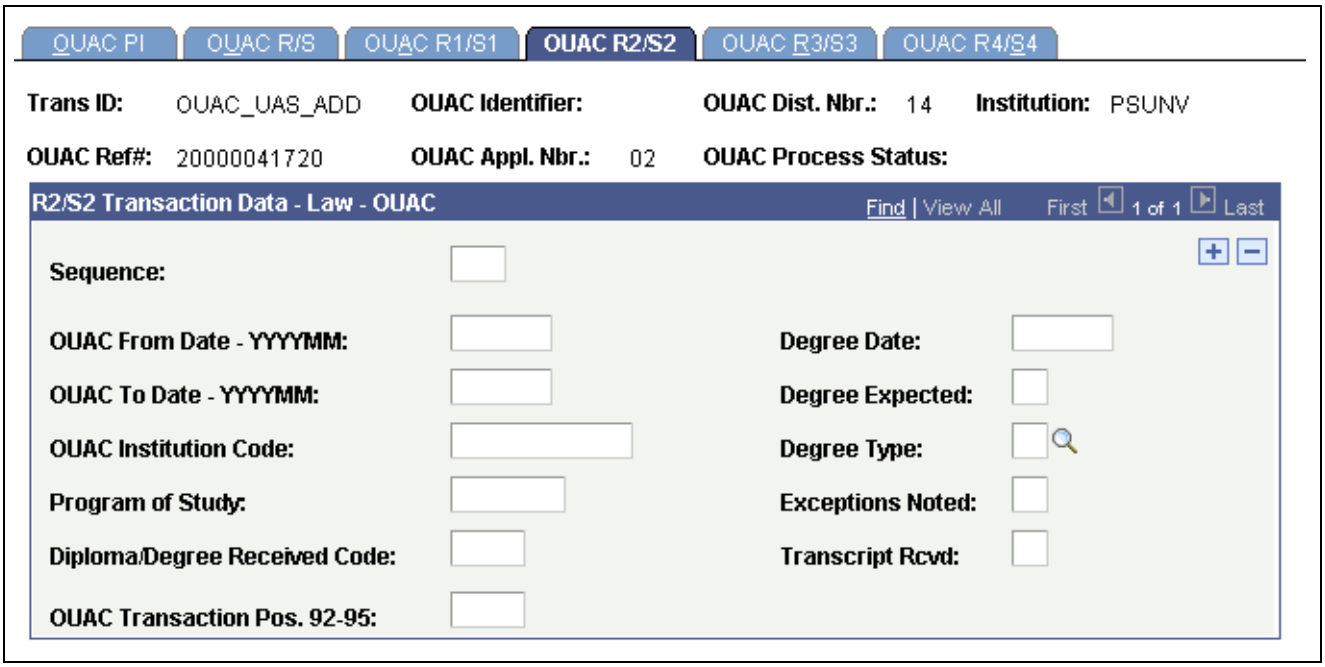
Access the OUAC R1/S1 page.



OUAC R1/S1 page

Reviewing OUAC Transactions R2/S2

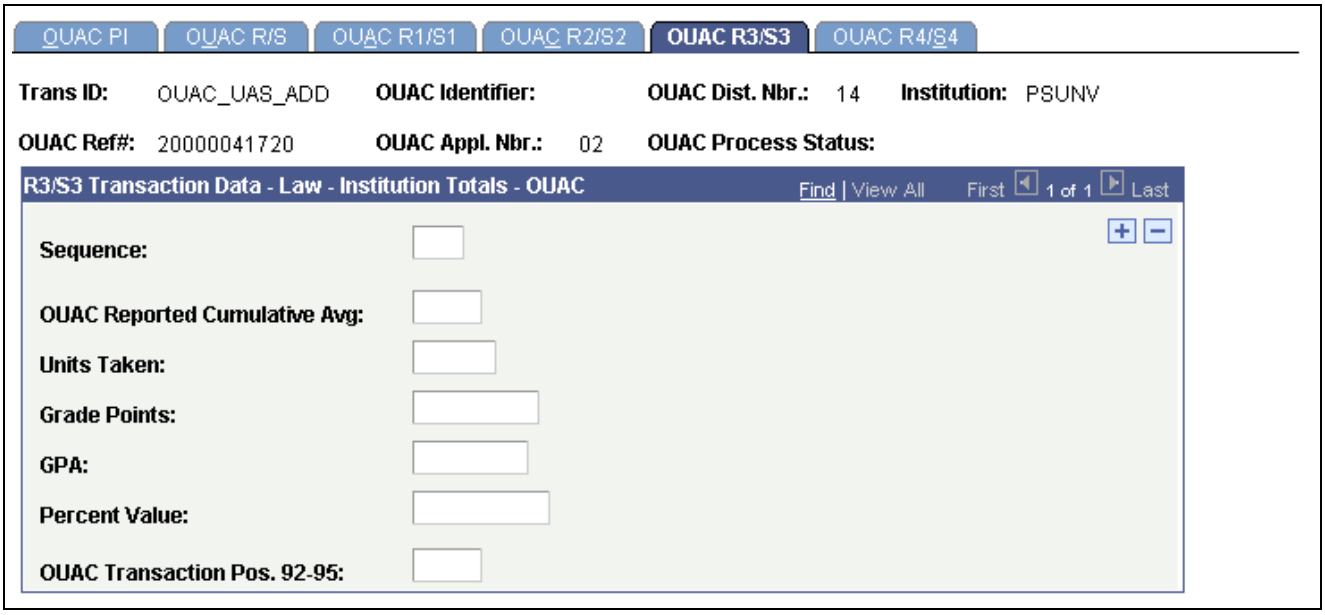
Access the OUAC R2/S2 page.



OUAC R2/S2 page

Reviewing OUAC Transactions R3/S3

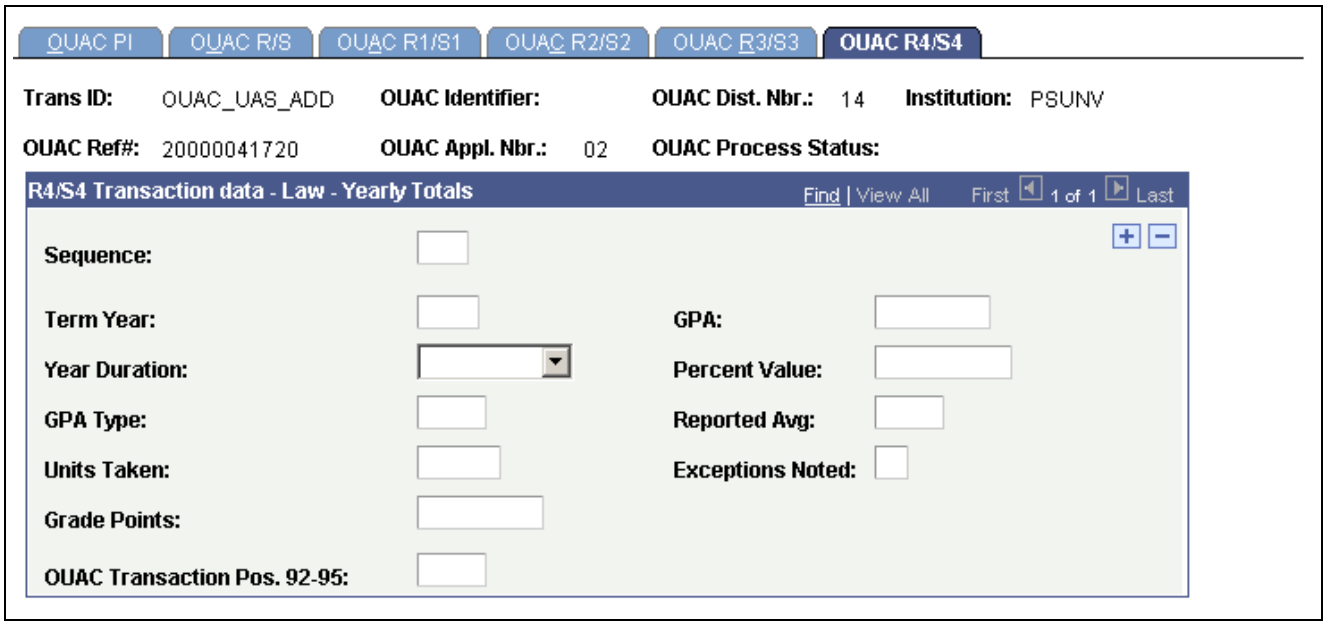
Access the OUAC R3/S3 page.



OUAC R3/S3 page

Reviewing OUAC Transactions R4/S4

Access the OUAC R4/S4 page.



OUAC R4/S4 page

Reviewing and Editing the OUAC Transaction T Staging Table

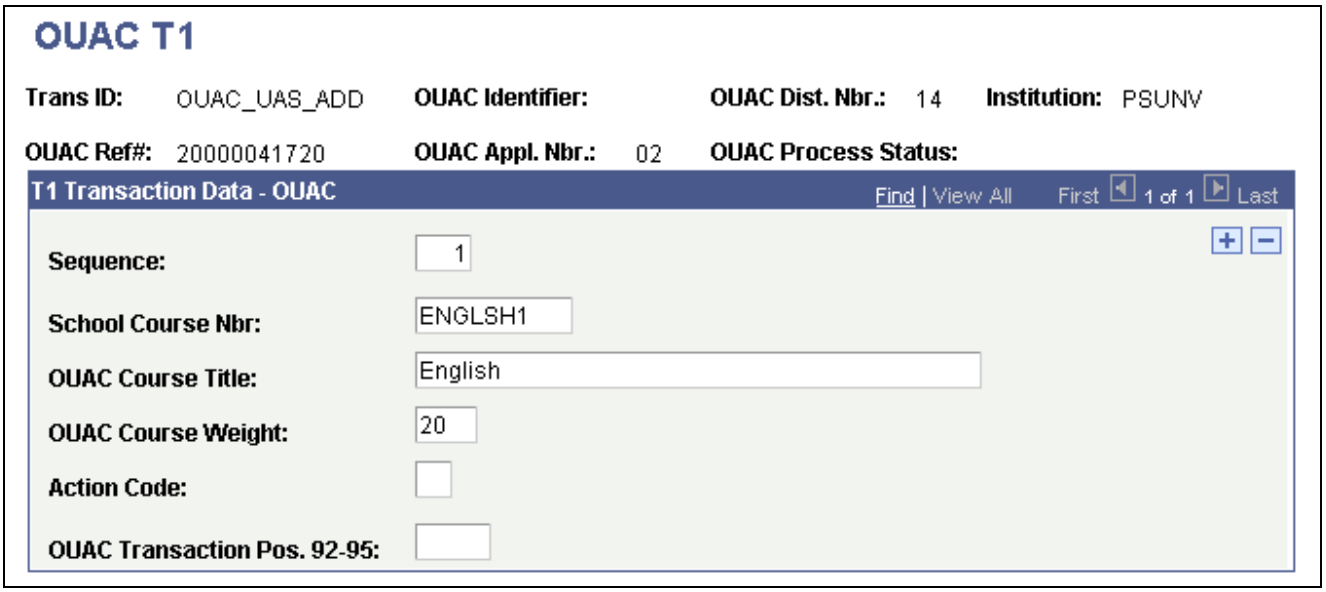
This section discusses how to use the OUAC T1 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction T Staging Table

Page Name	Object Name	Navigation	Usage
OUAC T1	OUAC_T1_PNL	Student Admissions, OUAC, Transactions, Transactions T1	Review and edit OUAC transaction data.

Using the OUAC T1 Page

Access the OUAC T1 page.



OUAC T1 page

Viewing Search/Match and OUAC Processing Statuses

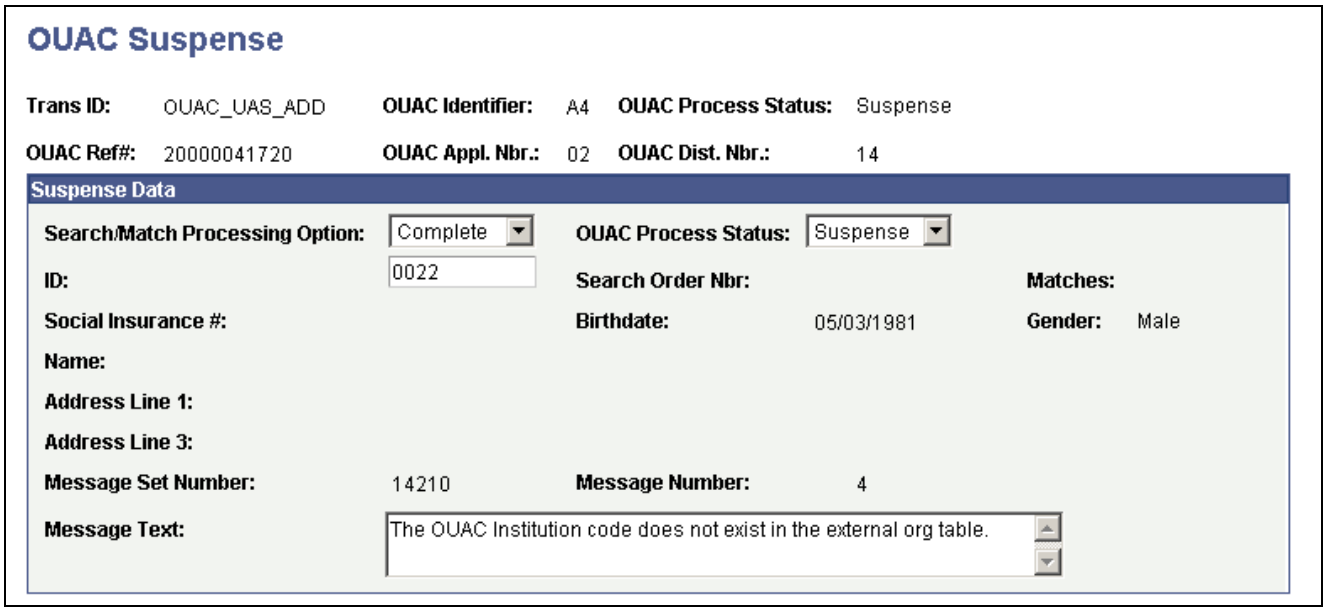
This section discusses how to use the OUAC Suspense page to view the status of an OUAC application record, and to view messages when generated by the posting process.

Page Used to View Search/Match and OUAC Processing Statuses

Page Name	Object Name	Navigation	Usage
OUAC Suspense	OUAC_SUSP_PNL	Student Admissions, OUAC, Processes, Suspense Data	View the status of an OUAC application record, and to view messages when generated by the posting process. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, if any errors were encountered during the search/match or loading processes, and so on.

Using the OUAC Suspense Page

Access the OUAC Suspense page.



OUAC Suspense page

Search/Match Processing Option Displays the status of the record after the Search/Match process.

Complete: The process was completed without errors.

Error: The process encountered errors.

Perform: The process has not run yet.

OUAC Process Status Select the status you want for this record. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The delivered values are *EDI Loaded, Loaded, Posted, Reviewed,* and Suspense. For example, you could change the status to *Loaded,* and the next time you run the post process this record would post to the database—because the post process posts any file with a status of *Loaded.* If you do not want the record to remain in suspense status and do not want to post it to the database at a later date, select *Reviewed.*

ID Select an ID to merge this record with an existing ID type. If the system suspended the record after it performed the search and discovered a match for one ID, that ID displays here.

If the system finds more than one match, the search order number appears and the number of matches appear in the Matches display-only field.

Posting OUAC Transaction Data

This process picks up all the transactions in Loaded status and posts the data to the PS Core tables. It creates separate applications for each OUAC reference number/application number that is not a 101 applicant. For 101 applicants it creates separate program numbers.

To post OUAC transaction data:

- Set search parameters for posting.
- Set OUAC post parameters.
- Set defaults for posting OUAC data.
- Set more post parameters.

Pages Used to Post OUAC Transaction Data

Page Name	Object Name	Navigation	Usage
OUAC Post Parms (OUAC post parameters)	OUAC_POST_PARMS	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parms	Define default values for admit type, application center, academic career, and campus.
OUAC Post Parms2 (OUAC post parameters2)	OUAC_POST_PARMS2	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parms2	Define application and transcript posting defaults.
OUAC Post Parms BC (OUAC post parameters BC)	OUAC_POST_PARMS_BC	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parms BC	Assign transcript status values.

Setting Search Parameters for Posting OUAC Data

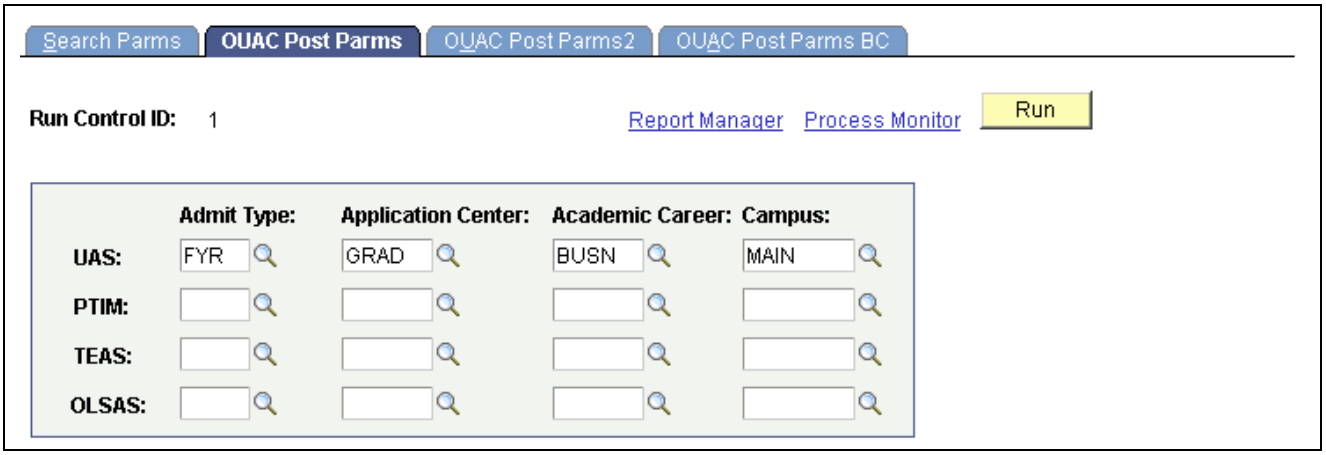
Use the Search Parms (search parameters) page to set up your search/match parameters for processing the OUAC staging tables.

See Also

Chapter 15, “Performing EDI TS130 Transcript Transactions,” Setting Up Search/Match Parameters, page 245

Setting OUAC Post Parameters

Access the OUAC Post Parms (OUAC post parameters) page.



OUAC Post Parms page

Admit Type Select the default admit type for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher’s college (TEAS), and law (OLSAS). The admit type that you enter

here is the default on the Application Data page (the ADM_APPL_DATA record). Define admit types on the Admit Types Table page.

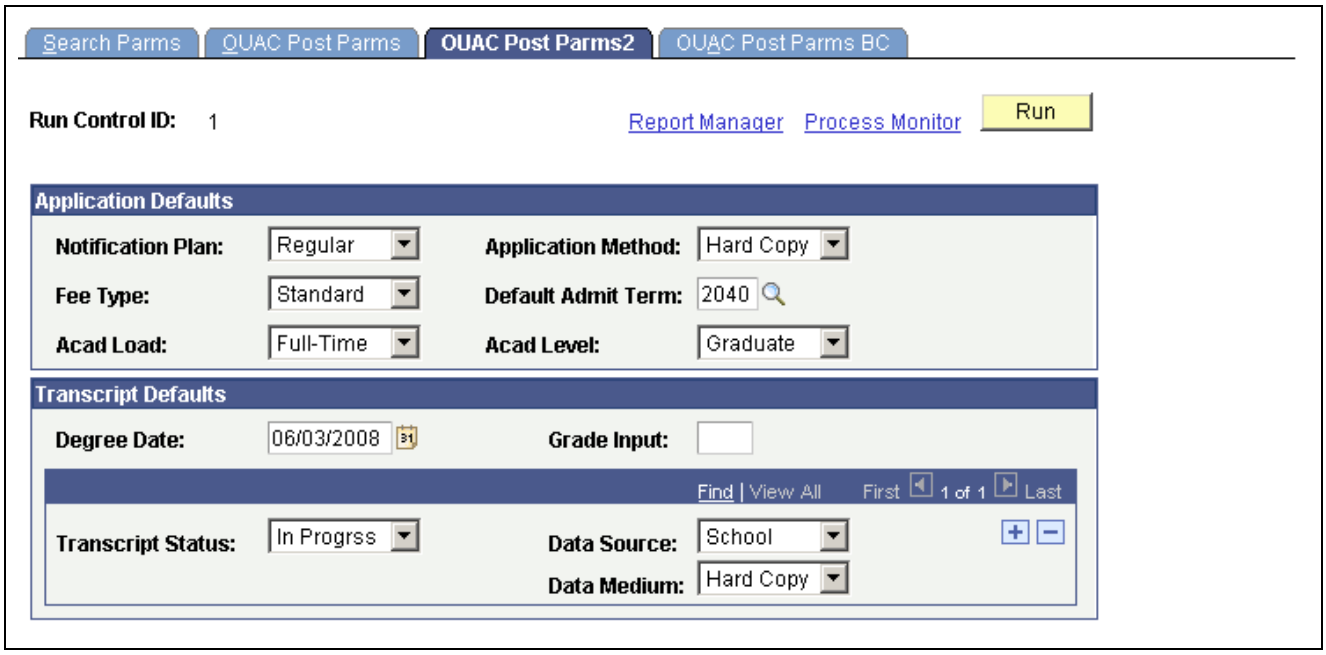
Application Center Select the default application center for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The application center that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define application centers on the Application Center Table page.

Academic Career Select the default academic career for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The academic career that you enter here is the default in the ADM_APP_CAR_SEQ record. Define academic careers on the Academic Career Table page.

Campus Select the default campus for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The campus that you enter here is the default on the Application Program page (the ADM_APPL_PROG record). If you do not select a campus here, the default is the default campus attached to the applicant's academic program. Define campuses on the Campus Table page.

Setting Defaults for Posting OUAC Data

Access the OUAC Post Parms2 (OUAC post parameters2) page.



OUAC Post Parms 2 page

Notification Plan Select the notification plan that you want entered for these applications during the posting process. A notification plan specifies whether this person should be on a regular or special notification track. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Early Admt* (early admit), *Regular,* and *Rolling.*

Application Method Select the application method you want entered for these applications during the posting process. Application methods indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Appl Serv* (application server), *Diskette, EDI* (electronic data interchange), *Hard Copy, OUAC* (Ontario Universities Application Center), *Web Appl* (web application).

Fee Type Select the fee type you want entered for these applications during the posting process. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Internatnl* (international) and *Standard.*

Default Admit Term Select a default admit term for OUAC transactions that transmit term information without a term date. Term Date is a required field in PeopleSoft applications.

Acad Load (academic load) Select the academic load you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.

Acad Level (academic level) Select the academic level you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.

Degree Date Select a default degree date for OUAC transactions that transmit degree information without a degree date. Degree Date is a required field in PeopleSoft applications.

Grade Input Enter a default grade for OUAC transactions that transmit courses without a grade. Grade is a required field in PeopleSoft applications.

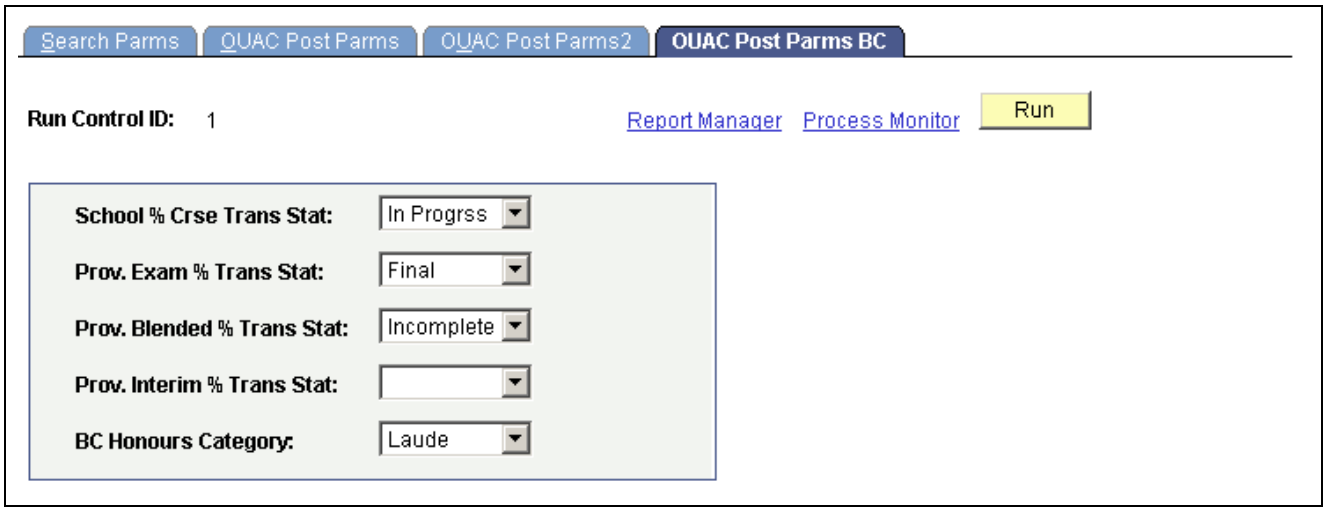
Transcript Status Select a transcript status. The data source and data medium that you select is the default for the transcript status that you select here. Insert rows to add subsequent transcript statuses.

Data Source Select a default data source for the transcript status in this row of data.

Data Medium Select a default data medium for the transcript status in this row of data.

Setting More Post Parameters

Access the OUAC Post Parms BC (OUAC post parameters BC) page.



OUAC Post Parms BC page

School % Crse Trans Stat (school % course translate status) — Assign a transcript status to the final percentage assigned by the school.

Prov. Exam % Trans Stat (province exam % translate status) — Assign a transcript status to the exam percentage assigned by the province.

Prov. Blended % Trans Stat (province blended % translate status) — Assign a transcript status to the blended percentage.

Prov Interim % Trans Stat (province interim % translate status) — Assign a transcript status to the interim percentage assigned by the school.

BC Honours Category — Enter a default for applicants who have earned honors standing. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are *Laude, Magna, None,* and *Summa.*

Note. If you assign the same transcript status to the percentage fields above, the incoming marks data does not create a new row, but, instead, overwrites the old one. Assigning a different transcript status to these fields ensures that marks are populated correctly.

Viewing OUAC Messages

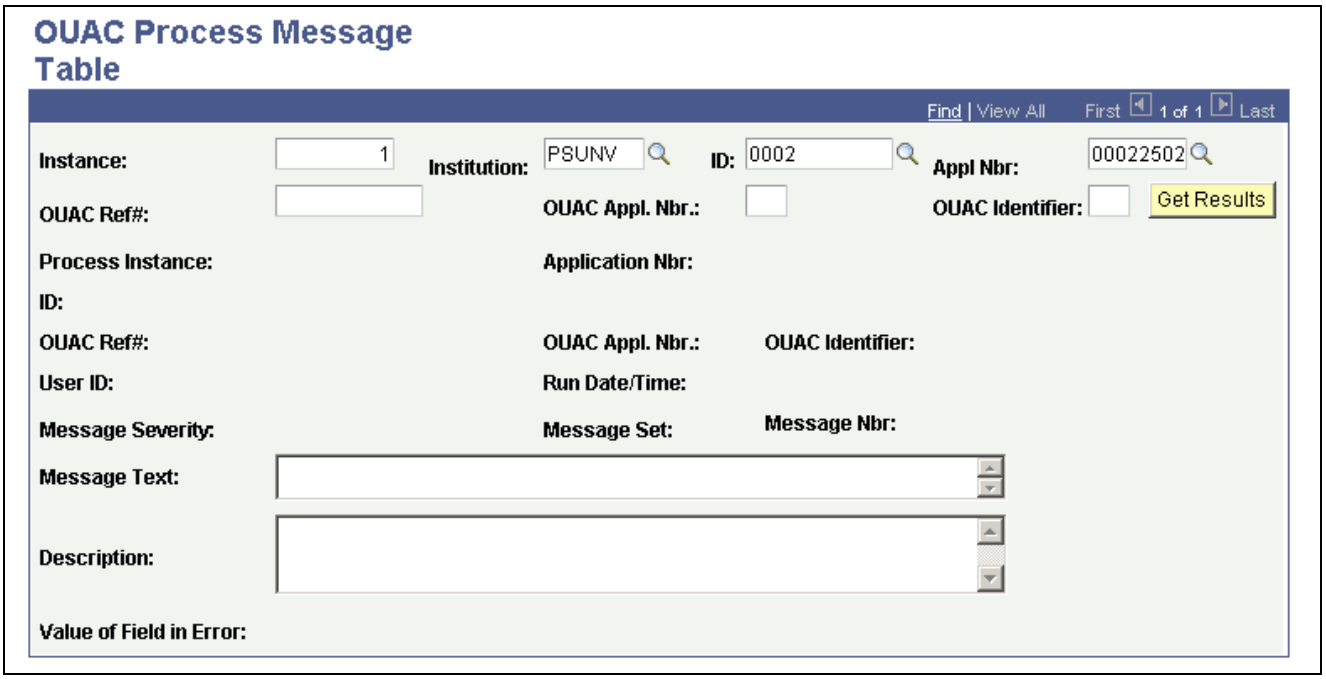
This section discusses how to view OUAC messages.

Page Used to View OUAC Messages

Page Name	Object Name	Navigation	Usage
OUAC Process Messages Table	OUAC_PRCS_MSG_TBL	Develop Enrollment, Process External Data, Inquire, OUAC Messages, OUAC Process Message Table	View errors generated during the posting process.

Using the OUAC Messages Page

Access the OUAC Process Message Table page.



OUAC Process Message Table page

Select the following criteria for which you want to search for OUAC process messages: *Instance, Institution, ID, Appl Nbr* (application number), *OUAC Ref#* (OUAC reference number) *OUAC Appl Nbr*(OUAC application number), *OUAC Identifier.*

Reviewing Overflow OUAC Application Information

Use the OUAC Application Data component to view overflow OUAC data. The data that appears in this component have no natural home in PeopleSoft core tables, which is why the data appears here. Thus, for students posted through OUAC, the OUAC Application Data component is an extension of their application.

To review overflow OUAC application information:

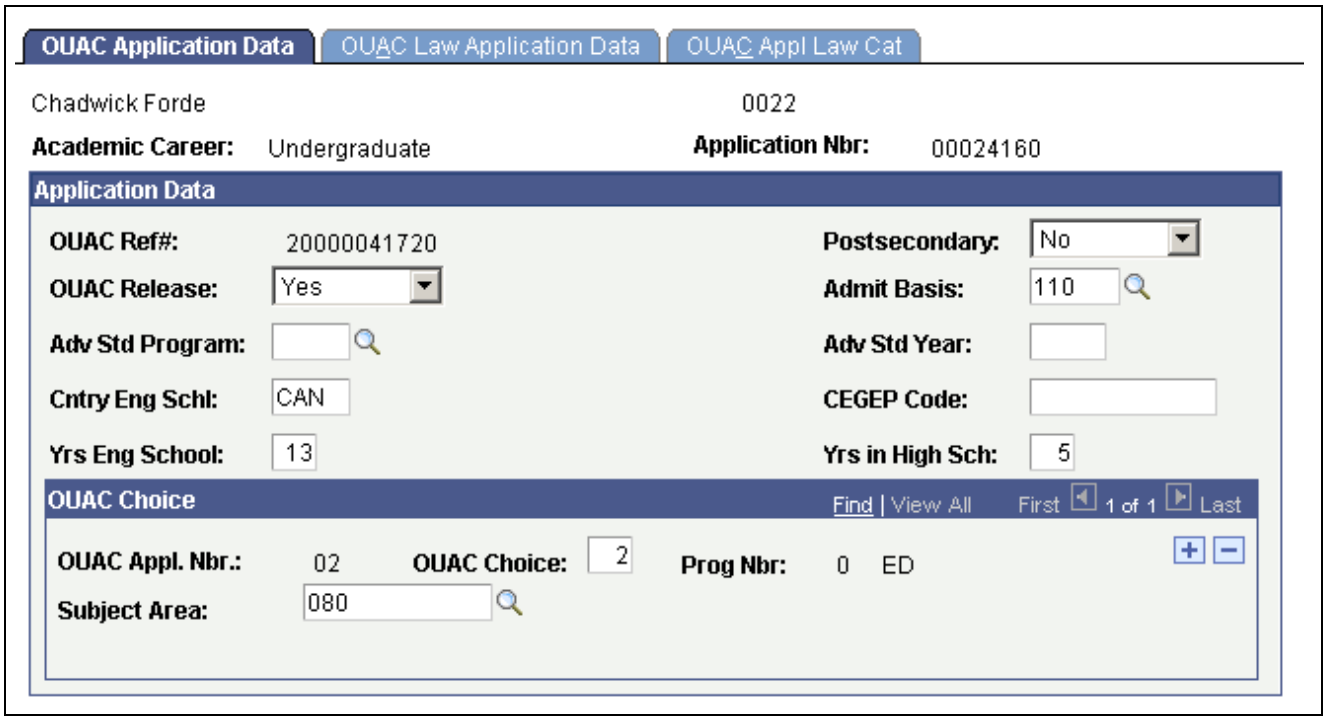
- Review general OAUC application data.
- Review OUAC law application information.
- Review OUAC law categories.

Pages Used to Review Overflow OUAC Application Information

Page Name	Object Name	Navigation	Usage
OUAC Application Data	OUAC_APPL_DATA	Student Admissions, OUAC, OUAC Application	View overflow OUAC application data.
OUAC Law Application Data	OUAC_APPL_DATA_LAW	Student Admissions, OUAC, OUAC Application, OUAC Law Application Data	Review overflow OUAC law application data.
OUAC Appl Law Cat (OUAC application law category)	OUAC_APPL_LAW_CAT	Student Admissions, OUAC, OUAC Application, OUAC Appl Law Cat	View OUAC law categories.

Reviewing General OUAC Application Data

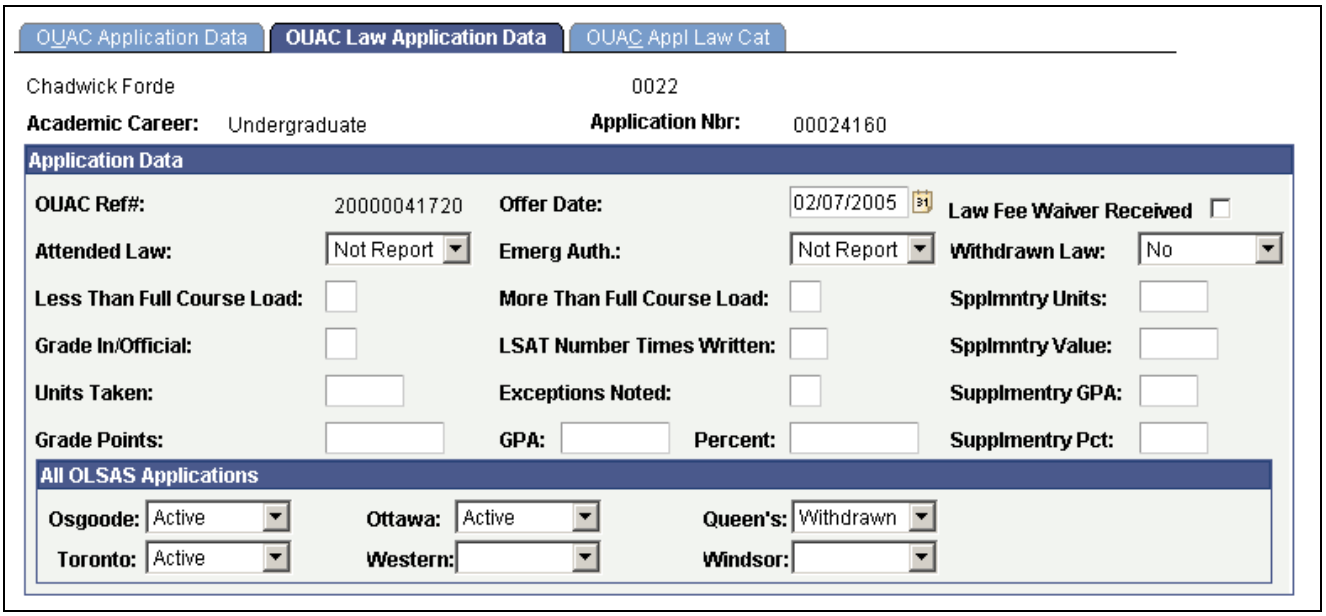
Access the OUAC Application Data page.



OUAC Application Data page

Reviewing OUAC Law Application Information

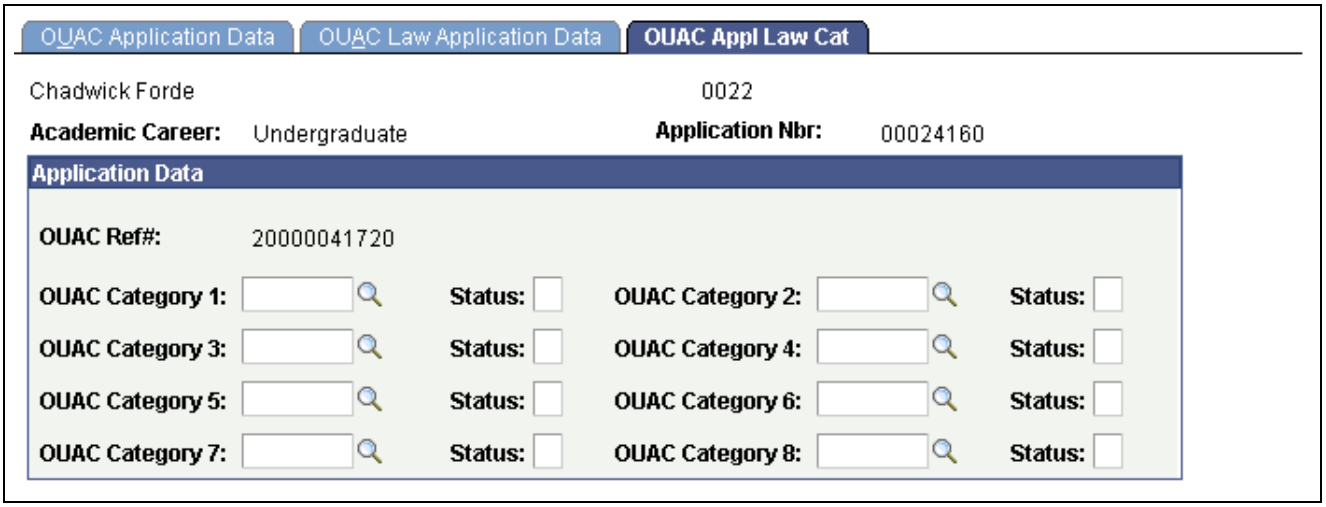
Access the OUAC Law Application Data page.



OUAC Law Application Data page

Reviewing OAUC Law Categories

Access the OUAC Appl Law Cat page.



OUAC Appl Law Cat page

CHAPTER 19

(NLD) Processing CBAP

This chapter provides an overview of CBAP (*Centraal Bureau Aanmelding en Plaatsing*) and discusses how to:

- Set up CBAP parameters.
- Maintain the CBAP suspension table.
- Load CBAP.
- Purge CBAP.
- Post CBAP.

Understanding CBAP

CBAP (*Centraal Bureau Aanmelding en Plaatsing*), the Dutch Central Bureau for Admissions and Registration, is part of IBG (*Informatie Beheer Groep*). CBAP registers admissions of all prospect first year students in Higher education or University. The CBAP utilizes the automated system RASP (Registration, Admissions, Selection and Placement) to facilitate registration. RASP registers the following information; Personal data of the prospect student, information about prior education and personal preference concerning the education institution and academic program to which he/she wishes to apply.

The CBAP procedure for admissions is based on a mandatory statutory requirement registered in the Higher Education and WHW act, the act Admissions for Higher Education, the Act Registration Mandatory Course Catalog for Higher Education and the Act on Prior Education Requirements for Higher Education.

Dutch Funded Education Institutions offering a pre-bachelor phase, in Dutch known as *propedeuse*, are obliged to partake in Central Admissions Registration procedures. This means that if a student plans to register at the *propedeuse* year of an academic program offered by a before mentioned funded Institution, he or she should register via the IBG. The CBAP (on behalf of IBG) then follows mandatory procedures as registered in the WHW act (article 7.37) and ensures that Admissions data is supplied to the Institution in question.

Students that are exempt from first year *propedeuse* registration can register directly at the Education Institution. Students can register directly at Education Institutions, which are not bound by the WHW act.

CBAP Process Steps

The CBAP Process can be divided into four different steps:

1. Load CBAP flat file into suspense table.
2. Search/match equivalent suspense data in PeopleSoft and check and correct suspense data manually.
3. Process suspense data in PeopleSoft (Posting).
4. Purge the suspense table.

Before starting the CBAP Load process, the user should indicate these items in the set up table:

- CBAP will be used as a functionality.
- External Organization.
- Checklist Item codes.
- Academic career relevant for Higher Education.

External Organization is used as a default organization code. Students for whom prior education data should be entered via the core External Academic Data table should have a parent row present in Academic History. The External Organization should be entered if the core tables are to be updated. This field can be left empty. CBAP does not actually supply External Organization information, but Prior Education information only. Prior Education will be registered in Dutch prior Education tables by the posting process. In Dutch functionality registration of external organization for prior education is optional.

Loading CBAP Flat Files Into a Suspense Table

First, the user has to place the received CBAP flat file (ASCII) in a directory at the institution's system. This directory must be known before one can read the file in the suspense table. The CBAP file will contain Personal, pre- education and info about the education program the student wants to apply to. For this an application engine based process should be created.

Institution The name of the institution should be provided.

BRINcode This code will be used only for matching/processing/purge processes. The BRINcode is available on the CBAP Load run control page and in the security set up options. Including the BRINcode on the run control record enables prompting on a BRINcode security table.

Effective Date This date is used for admissions date and withdrawal date of student applications.

Action Date The Action Date is used to track the date the application data was provided in the system. This date will update the corresponding field in the Admissions Application Maintenance pages.

Admit Term The term in which you are matriculating the student into the academic program. The admit term normally comes from the PeopleSoft Recruiting and Admissions matriculation process by default. However, because you are performing the admissions action though a data load, you must select the admit term for the primary academic program that you have specified and it will be used as the default for those applicants that are part of the CBAP Load

Admit Type Select the admit type that you want to default for those applicants that will be loaded through the CBAP Load Process.

Application Centre Select the application center to be defaulted for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.

Academic Level Select the academic level that you want to assign to the selected applicants that will be loaded from the CBAP Load.

Academic Plan Select the academic plan that you want to assign to the selected applicants that will be loaded from the CBAP Load. Use this field when no standard plan has been defined.

After providing and then performing the checking of these parameters, the application process can be started and the data will be present in the suspense table. A status field will provide information to indicate whether the process ran successfully or not. This field will be present on a separate page in an online maintenance component for the suspense data.

This status field is called ‘Edit’ and contains the following values:

Edit Value	Description
Completed	Process was able to read the data and put it in the suspense table without any problems
Error	An error has occurred after reading and /or loading the record in the suspense table.
Perform/Post	This value is manually maintained and is for information purposes only. The value is used for informational purposes at schools. During the upload process the system will allocate one of two edit values, namely Completed or Error. The process does not use the Perform/Post field value.

The following errors might occur during the upload process and are displayed on the CBAP Processing Option panel:

- Error in Country.
- Error in Campus.
- Error in Academic Program.
- Error Prior Education.
- Error in Subject code.
- Error in Academic Plan.

These errors will occur during the loading process if values are present in the CBAP Load file that are not known in the PeopleSoft tables. The functional criteria for determining whether information supplied is correct or not is based on combinations of Academic program and Campus/BRINcode combinations. Functional and technical changes in registration of Campus, Home Campus and BRINcode should be taken into account.

Using the Posting Process to Perform Search/Match

For CBAP information to be present, the suspense table has to indicate whether information is to be added as new records (new student) in PeopleSoft core tables, or whether it has to be updated or ignored. To make this possible, search / match parameters must be provided. It should also indicate whether the search/match functionality set-up used is actually the core search/match product provided by PeopleSoft. The posting process, which also performs search/match, uses this set-up to perform search/match.

For new/existing students the following options apply for the suspense data:

- Add - add the suspense information to PeopleSoft.
- Suspend - nothing will be done with the suspense record.
- Ignore - the record will be removed eventually from the suspense table, no actions will be done for PeopleSoft.

A status field will provide information and indicate whether the process ran successfully. This field will be present on a separate page in an online maintenance component for the suspense data. This status field is called ‘Search’ will provide info if the process ran successfully.

Search Value	Description
Completed	The process has been run without any problems.
Error	An error has occurred in the search/ match process of the record in the suspense table.
Perform/Post	Process has not been run yet for this record. This option is not evaluated the posting process and will not be used by it. The process uses the post field only when finished.

The process has to be based on application engine technology.

Process Suspense Data

Before a suspense record can be processed, the read process and match process must have been run successfully for the student concerned. This will result in the status fields ‘ Edit’ and ‘ Search’ both being set to complete. The status field ‘ Process’ will provide the status of the suspense record. The values described below can be maintained manually in an online maintenance component, although some will be set automatically by the search /match process.

Value Process	Description	Set By
Error	An error has occurred during the process.	The system during the process
New ID Add	The system was not able to find a similar record/match in the PeopleSoft database and will add a new student ID when you run the search/match/post process When set manually, it means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	The system during the search / match process, when no match was found in the PeopleSoft database. It can be set manually.
No Action	Manually entered. Search/match/post will ignore this option and the record will not be processed and purged from the suspense table.	Manual
Purge	This value means that the suspense record will be purged during the purge process (described in the purge section)	By the system when the search/match/post process if the record has been completed successfully

Value Process	Description	Set By
Update ID	The search/match/post process has found a matching ID in the PeopleSoft database. The process will update the matching records with the suspense record data When set manually, this indicates that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	By the system during the search/match process if a match was found in the PeopleSoft database and if your search parameters define that an update action should occur in this situation (only when you run search/match and post at different times). Set manually.
Wait Srch	This suspense record is waiting to be processed by the search/match/post process,	The system during the CBAP load process.

Setting Up CBAP Parameters

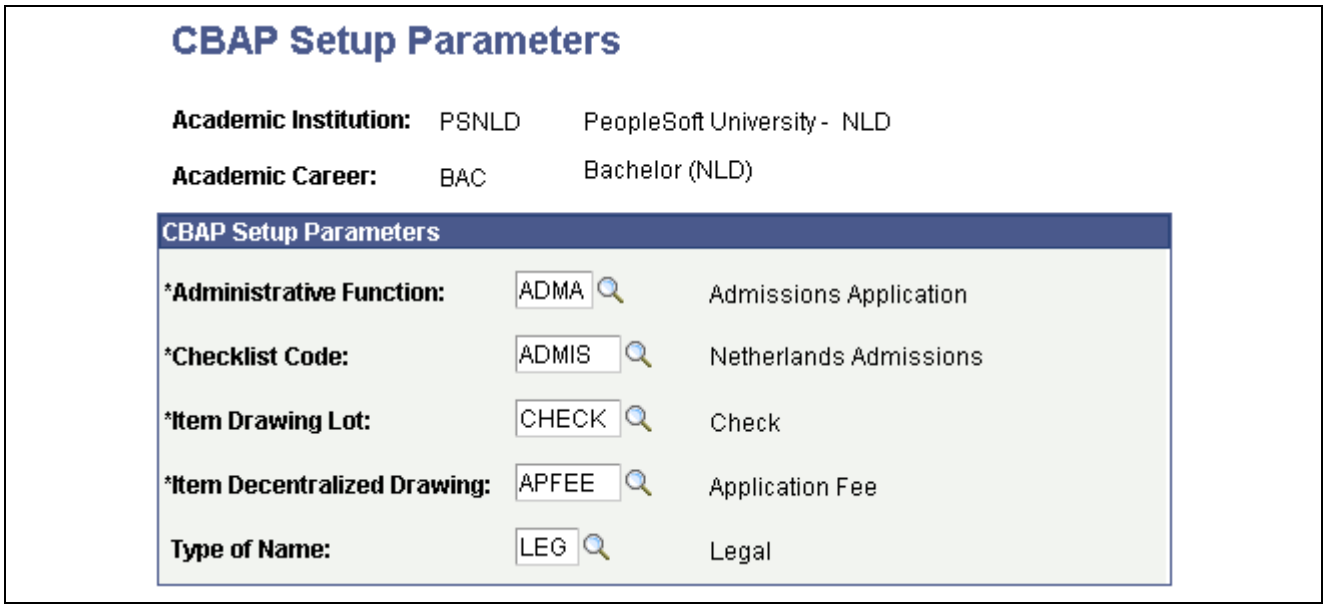
This section discusses how to set up CBAP parameters.

Page Used to Set Up CBAP Parameters

Page Name	Object Name	Navigation	Usage
CBAP Setup Parameters	SAD_CBSYST_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Setup Parameters	For CBAP there is only a setup for the institution and academic career. Security should prevent usage of CBAP as only key users will be able to use this functionality. After inserting a new setup record with the relevant institution and academic career, a few values have to be entered: Admin function is required for checklist determination in the CBAP process. Checklist code is required for the checklist which will be used for the CBAP process for the CBAP codes 0, 8, D and 9. The checklist items must be provided for usage within the CBAP process. This information is needed for determination in the CBAP process which item must be added to the earlier mentioned checklist for the relevant student if a code 8, 9 or D is used.

Setting Up CBAP Parameters

Access the CBAP Setup Parameters page.



CBAP Setup Parameters page

Administrative Function The Administrative Function Table stores the codes for the core functional areas in Student Administration that process Communication, Checklists, and Comments. It also stores the key data that should be populated as variable data on the Communication, Checklist, and Comments records.

Checklist Code Select the code that will create a checklist item once the Posting Process is executed.

Item Drawing Lot This is a specific item for usage at CBAP codes 8 and 9. It will be added to the checklist in the posting process for the CBAP codes 8 and 9 as a drawing lot checklist item for the student.

Item Decentralized Drawing A specific item for usage at CBAP code D. It will be added to the checklist in the posting process for the CBAP D code as a decentralized drawing checklist item for the student.

Type of Name Indicate a usage of the student's name by entering a name type in the setup (usage of LEG is usually applied).

Maintaining the CBAP Suspension Table

This section discusses how to maintain the CBAP suspension table.

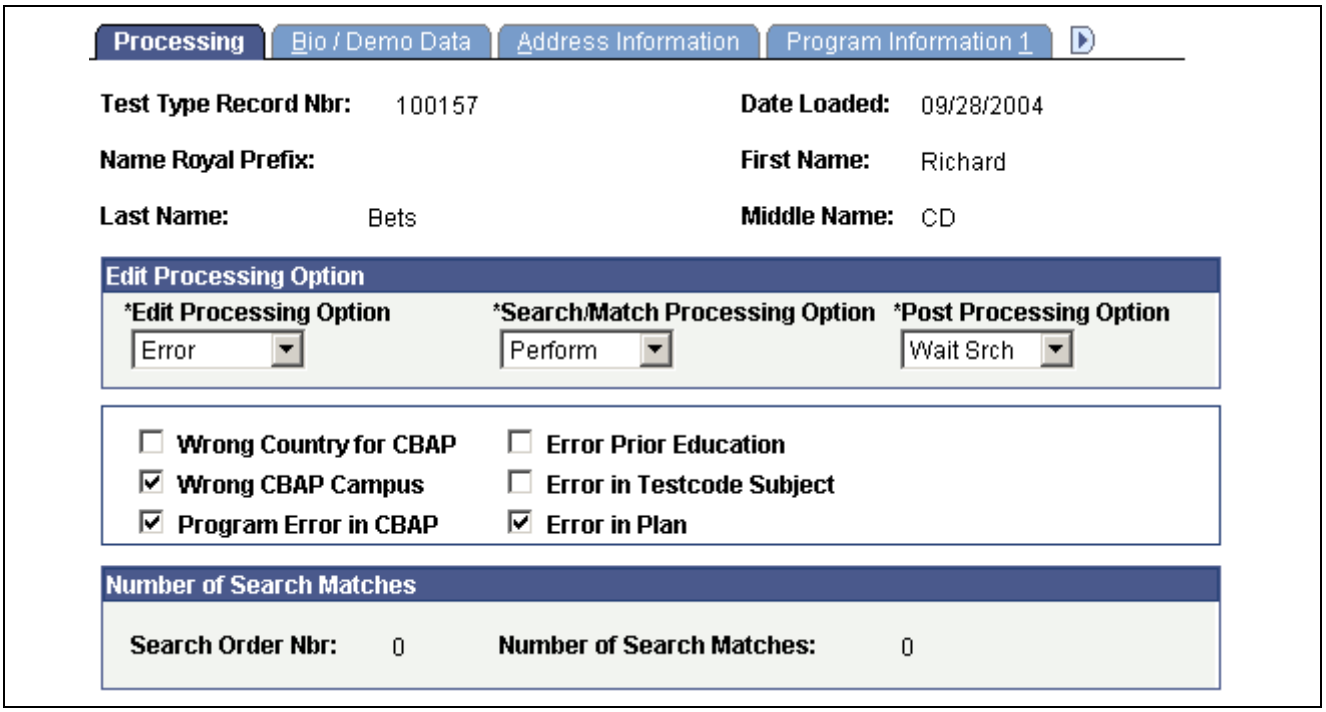
Pages Used to Maintain the CBAP Suspension Table

Page Name	Object Name	Navigation	Usage
Processing	SAD_CBPROC_OPT_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table	Set and define processing options used in the CBAP Load process. The data contained in this component provides information, actions and status based on the CBAP Load process. This page also provides details regarding the search/match execution during the Post Process. You can determine if a record is waiting to be processed, a record created a new person to be added to the database, and any errors were encountered during the search/match or load process, etc.
Bio/Demo Data	SAD_CBBIO_DEMO_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Bio/Demo Data	Enter or select biographical and demographic information about the student.

Page Name	Object Name	Navigation	Usage
Address Information	SAD_CBADDR_INF_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Address Information	Enter the student's address information.
Program Information 1	SAD_CBACD_INF1_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 1	The data on the Program Information 1 page is a result of both the load process, which is from the CBAP flat file, as well as data contained in the PeopleSoft Setup tables used to process the CBAP Load. Data can be added or changed which will be used in the CBAP Post Process.
Program Information 2	SAD_CBACD_INF2_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 1	The data on the Program Information 2 page is a result of both the data read from the CBAP flat file as well as data contained in the PeopleSoft Setup tables used to process the CBAP Load. Data can be added or changed which will be used in the CBAP Post Process.
Subject Information	SAD_CBACD_INF2_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Subject Information	The data on the Subject Information page is a result of the CBAP data load. Data can be added or changed which will be used in the CBAP Post Process.
Messages	SAD_CBMESGS_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Messages	The data contained in the Messages page is a result of data that errors based on the load. The information contained provides specific reasons as to why certain data elements erred during the load process.

Editing Process Options

Access the Processing page.



Processing page

This page indicates the status of a CBAP data record after the search/match process runs. You can determine if a data record is ready to be processed (posted). The page indicates whether a new person is added to the database. Errors are shown that occurred during search/match.

Test Type Record Nbr (test type record number) With each student in the flat file being loaded to the application, the number increases. The number is unique to each row in each CBAP file.

Date Loaded The date that the CBAP file was loaded to the application. It is the system date.

Name Royal Prefix The term used to designate the student's degree of sovereignty, nobility, or honor.

Edit Processing Option

If an error appears in any of the Processing Options fields, the Error Indicator group box displays in which area an error occurred. You should correct the errors before you proceed. Once you make a change to any of the fields in this page, click the save button at the bottom of the page

Edit Processing Option The field shows the status of this record as updated by the upload process:

- Complete: The program was able to process this record without errors.
- Error: An error has occurred processing of this record.
- Perform: This value should be set manually only and serves informative purpose only.

Search/Match Processing Option This field shows the status of the search/match process:

- Complete: Search/match executed without errors.
- Error: Error occurred during search/match.
- Perform: Search/match has not yet been executed.

Post Processing Option The post (verwerk) field shows the status of the record after posting has taken place. These values can be entered manually although some will be filled automatically after processes have run:

- Error: An error has occurred during the posting process.
- New ID Add: The system was not able to find an equivalent record in the database and will add a new student ID during posting.
- No Action: This value was appointed manually. The posting process will ignore this record.
- Purge: This value indicates that the record has been processed and should be purged from the suspense table.
- Update ID: The system has found a matching ID in the database. The existing ID should be updated with CBAP suspense file data during posting.
- Wait Srch: This record is stored in the suspense table and waiting further processing by search/match.

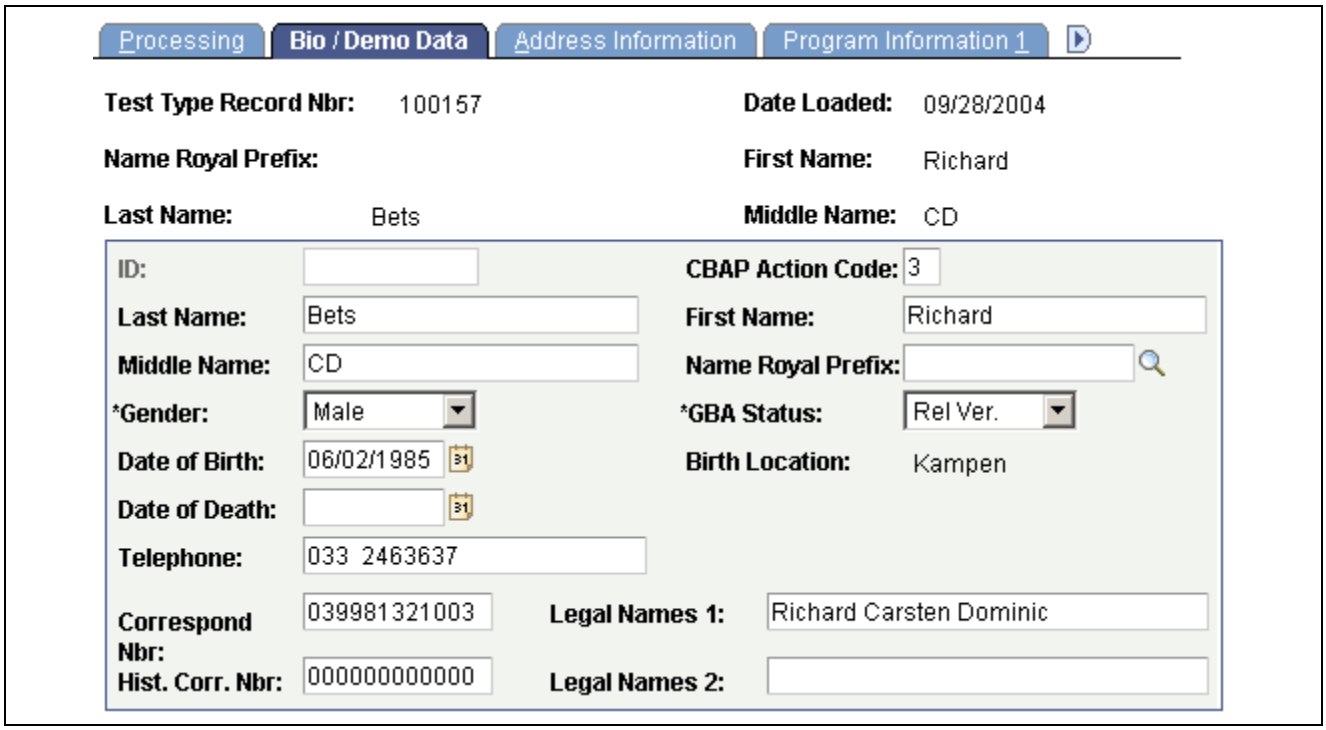
Number of Search Matches

Search Order Nbr (search order number) The search number of the search level used to find a match for the person shown.

Number of Search Matches The number of "hits" for this particular person.

Entering Bio/Demo Data

Access the Bio/Demo Data page.



Bio/Demo Data page

This page contains all biographical and demographic data loaded into the suspense table when a new record is posted. If a matching data record is found in the database, and the option is chosen to update database data with CBAP suspense data, these personal data elements will not overwrite the existing personal data elements.

ID After running the upload process the ID field is set to display only and is empty. After the search/match process has run, this field will be open for editing and should contain the ID of the student found in the database if an equivalent is found based on the search/match criteria. The field will contain the value NEW for all new admissions students unknown to the system.

GBA Status (Gemeentelijke Basis Adminstratie status) The student's *Gemeentelijke Basis Adminstratie* (GBA) status as assigned by the GBA to the person. The data is loaded from the CBAP file into the system.

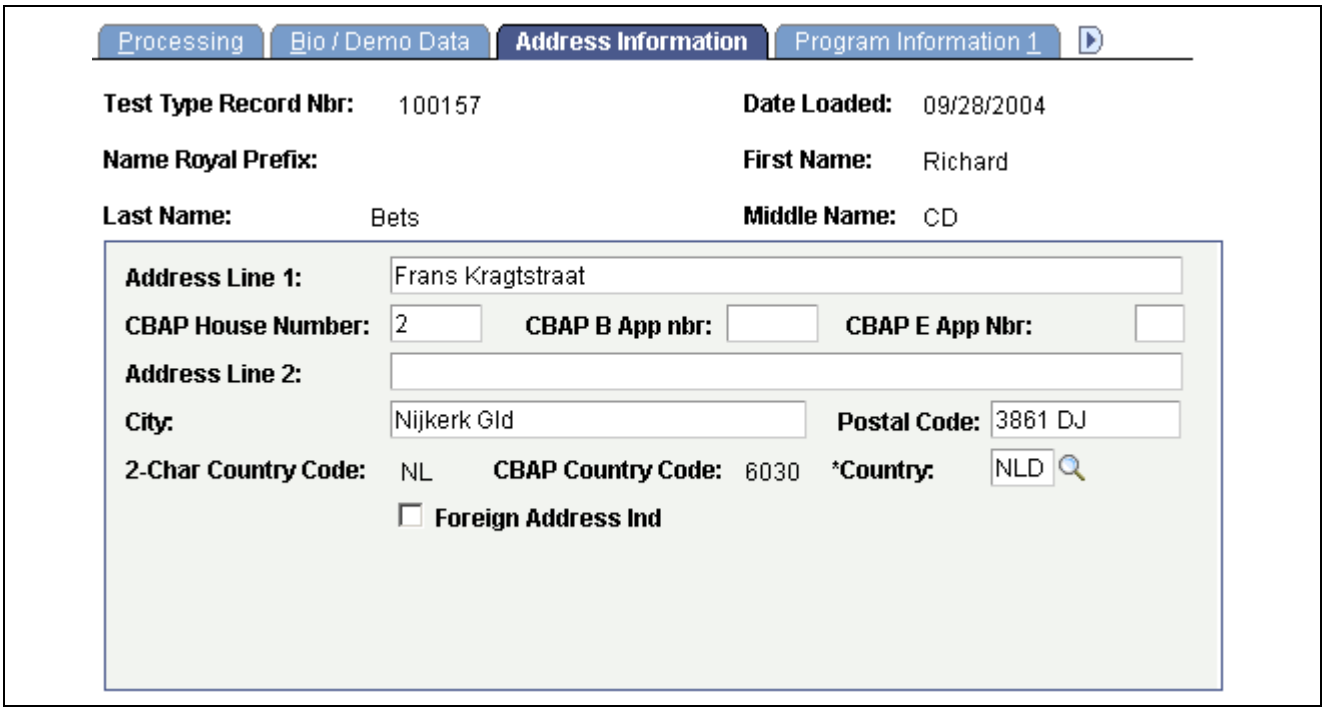
Correspond Nbr (corresponding number) The student's Gemeentelijke Basis Adminstratie (GBA) status as assigned by the GBA to the person. The data is loaded from the CBAP file into the system.

Hist. Corr. Nbr (historical correspondence number) The person's historical correspondence number. This value is loaded from the CBAP file.

Legal Names 1and **Legal Names 2** These fields will be populated with the full name of the student, received from the CBAP suspense file. First, the Legal Names 1 field is populated, and, if needed, then the Legal Names 2. When the name type is filled at the CBAP setup parameter, these names will be eventually entered in the system at the name type provided in the parameter setup.

Entering Address Information

Access the Address Information page.



Address Information page

This page contains demographic information from the CBAP Load file. This page should be used to view and or alter address data before posting.

CBAP House Number The house number that CBAP has on file for this student.

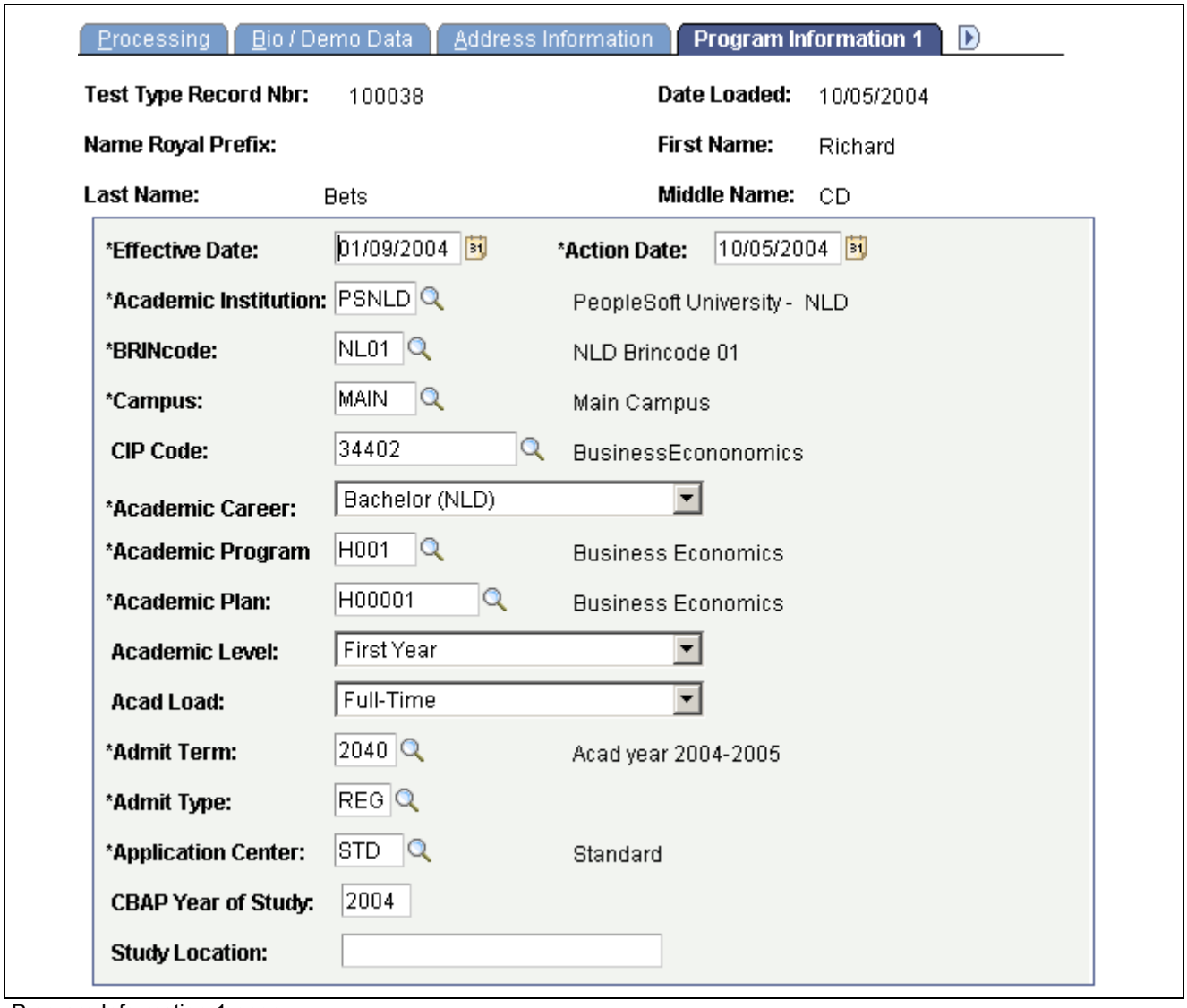
CBAP B App Nbr The student's beginning apartment number.

CBAP E App Nbr The student's ending apartment number.

Foreign Address Ind The foreign address indicator is used when the country is not equal to NLD (Netherlands). The address row displays and must be entered accordingly.

Entering Academic Program Data

Access the Program Information 1 page.



Program Information 1 page

Effective Date The system displays the Effective Date for the status of the applicant. This value defaults from the corresponding field on the CBAP Load Parameters page. The CBAP Load process uses the effective date field for Admissions and Student Records adds and withdrawals. The process writes to the application

program data record. For personal data changes, the CBAP load process uses the current system date to update the relevant record.

Action Date The system displays the Action Date for the status of the applicant. This value defaults from the corresponding field on the CBAP Load Parameters page. The system records and displays the action date to track the date the information was actually updated. The CBAP Load process will write this value to all records containing the Action Date field for this applicant.

Academic Institution This field displays the Academic Institution for which you want to load data from the CBAP file into the suspense file. The CBAP process places the institution value you select into different records as defined by the process itself. This value defaults from the corresponding field on the CBAP Load Parameters page.

BRINcode This is a code that is assigned to all Dutch Institutions by the Dutch Ministry of Education and is mandatory that this code be used in all official communications with the Ministry.

Campus The Campus being applied to with this application. Campus values are defined on the Campus Table page.

CIP Code The appropriate VREBO Code for the Academic Plan as found on the CBAP file. CREBO Codes are defined on the Crebo Codes in the Netherlands Academic Structure Setup component.

Academic Career The Academic Career being applied to with this application. Academic Career values are defined on the Academic Career Table.

Academic Program The Academic Program being applied to with this application. Academic Program values are defined on the Academic Program Table.

Academic Plan The Academic Plan within the Academic Program being applied to with this application. This value defaults from the corresponding field on the CBAP Load Parameters. Academic Plan values are defined on the Academic Plan table.

Academic Level The CBAP Load process maps the academic level to the academic level field in CRI-HO. This level will be used later in the process of sending information to the Central Register of Higher Education in the Netherlands. When the system is checking to see if an applicant is allowed to be withdrawn, it will not allow the withdrawal if the applicant's academic level is different then the one entered on this page. This value defaults to the CBAP Suspense file and can be changed once in the CBAP Suspense pages. The values for the academic level fields are delivered with the system as translate values.

Acad Load (academic load) This field displays the applicant's selected academic load for the program to which she or he is applying as found on the CBAP file.

Admit Term The Admit Term will be displayed for the term to which the applicant applies. The CBAP Load process will write this admit term value in every record with the Admit Term field in it. This value defaults to the CBAP Suspense file, where it can be later changed in the CBAP Suspense page

Admit Type Type for this applicant regarding this application. For example, you may have a value such as "First-Year and Transfer". The CBAP Load process writes the admit type to every application record found in the CBAP file. Values for this field are defined on the Admit Type table. This is an user default

field. This value defaults to the CBAP Suspense file, where it can later be changed in the CBAP Suspense pages.

Application Center Enter the Application Center where this application will be processed. This information helps you track what office is handling specific applications. Values for this field are defined on the Application Center table. This is an user default field. The value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense component.

CBAP Year of Study The CBAP Load process displays the academic year for which the applicant wants to start.

Study Location The CBAP Load process displays the location of the applicant's prior education. This value defaults from the corresponding External Organization field on the CBAP Load Edit Parameters page.

BRINcode

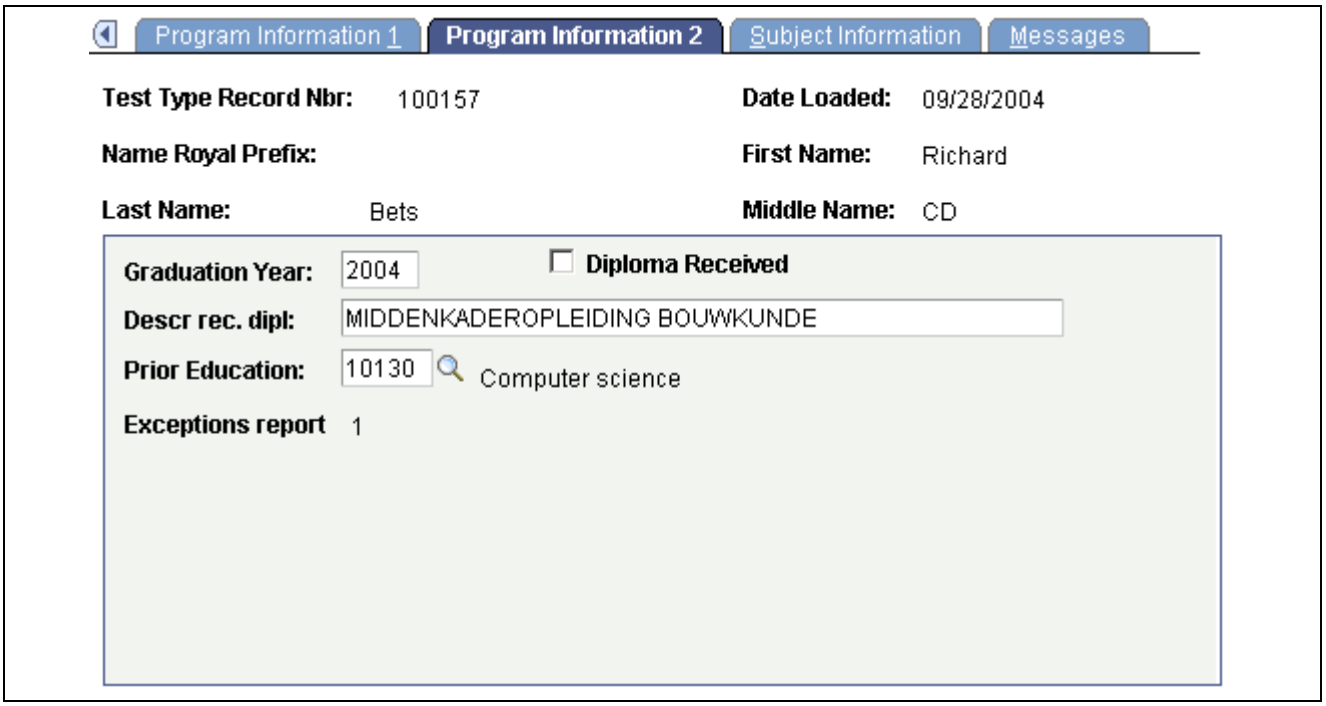
BRIN is short for Basic Registration for Institutions (*Basisregistratie instellingen*). The Dutch Ministry of Education only is authorized to appoint BRINcodes to all institutions. It is mandatory that this code be used in all official communications with the Ministry. This is why the BRINcode is relevant for communications concerning Admissions and Registrations. Therefore, the functionality that should be built for CBAP, is affected by this Ministerial requisite. The BRINcode is a four-digit number, supplemented with a two-digit location code, which distinguishes one institution from another. This connection with locations in addition to Institutions implies that the BRINcode does not have a one on one relationship with the institution. Multiple BRINcodes may exist within one Institution. As the Dutch Ministry of Education appoints BRINcodes, they should be considered semi-dynamic. BRINcodes will only change if the organizational structure of an Institution changes in a way that has impact on legal company structures or responsibility structures concerning requirements as set by the Ministry of Education or if the Ministry decides that new BRINcodes should be issued. BRINcodes are usually only issued for new institutions. It follows that registration of BRINcode should be effective-dated. Registration of BRINcode should be possible in combination with Academic Programs, Campus and Academic Organization. Multiple Academic Programs and Campus combinations may be in operation within one specific BRINcode.

CIP Code and HEGIS Code

For Academic Programs all qualifications on MBO level (*Middelbaar Beroepsonderwijs*), which offer Adult Education and Professional Education, are registered as CREBO codes (*Centraal Register BeroepsOnderwijs*). CREBO roughly translates as Central Registry for Professional Education. The Academic Programs are actually derivatives of the CREBO codes. The Dutch Ministry of Education, via the IBG, appoints CREBO codes. The CREBO code is registered in the HEGIS Code Table. The CIP code (ISAT code) is a means to register qualifications and Academic Programs for Higher Education. The ISAT code is also appointed by the IBG. As the CIP code and the HEGIS code are not mutually exclusive, two separate tables are necessary to register these codes. The CIP code is registered in the CIP Code Table. Both codes are considered dynamic and therefore should be registered in effective-dated tables. A clear and apparent connection should exist between the CIP codes and Academic Programs and Plans. The same relationship applies for HEGIS Codes and Academic Programs and Plans.

Entering Prior Graduation Information

Access the Program Information 2 page.



Program Information 2 page

Graduation Year The year the applicant graduated or will graduate from the prior education.

Diploma Received This field displays whether the applicant already received a diploma from the prior education.

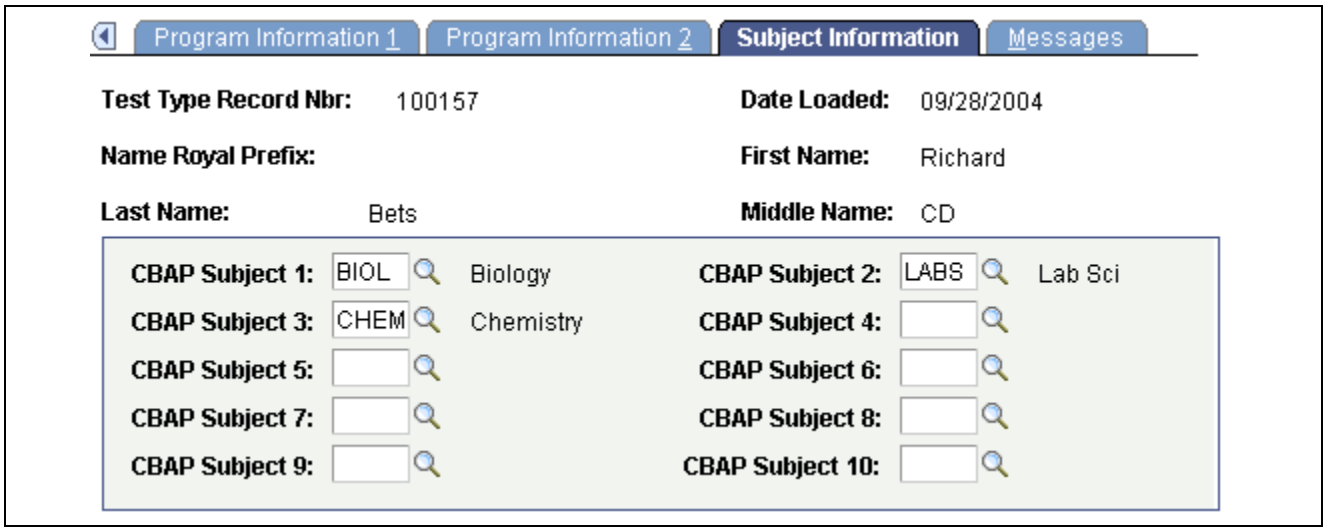
Descr rec. dipl (description recent diploma) The Institution at which the prior diploma was awarded.

Prior Education The applicant's prior education before applying to your institution.

Exceptions report Indicates when an institution can expect information from CBAP about the applicant's 'bewijs van toelating'. This is a letter of acceptance from the IBG.

Entering Subject Information

Access the Subject Information page.

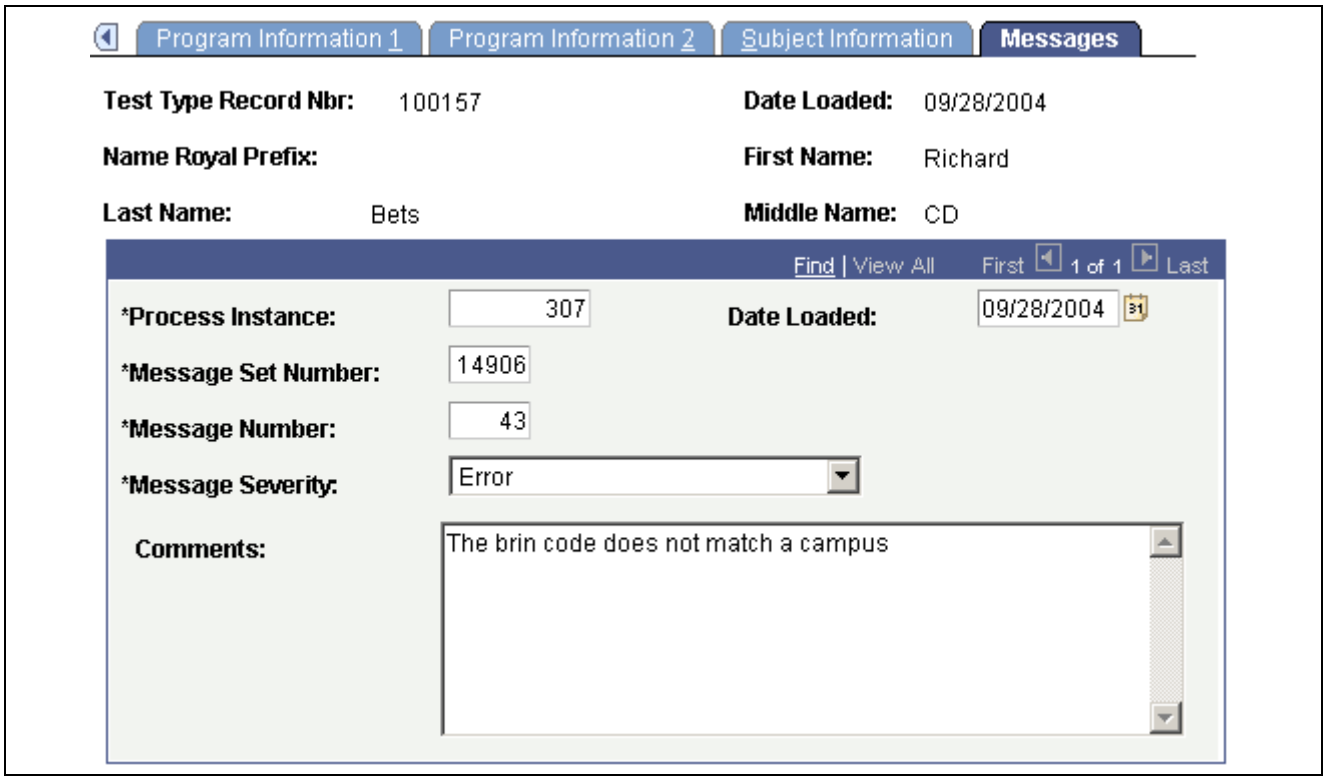


Subject Information page

CBAP Subject (1 - 10) Subject data comes from the CBAP Load process and is loaded in the students external subjects.

Entering Messages

Access the Messages page.



Messages page

Process Instance The field displays the process number of the last process run for this record. This number is generated by the Process Scheduler.

Date Loaded The date the CBAP file was loaded into the suspense file.

Message Set Number The message set number is copied from the message catalog that has been defined in the system data definitions database.

Message Number The message number is a subset from the Message Set Number and has been defined in the system data definitions.

Message Severity This field displays the severity of the message, such as Message or Error

Comments The results or other additional information about the message.

Loading CBAP

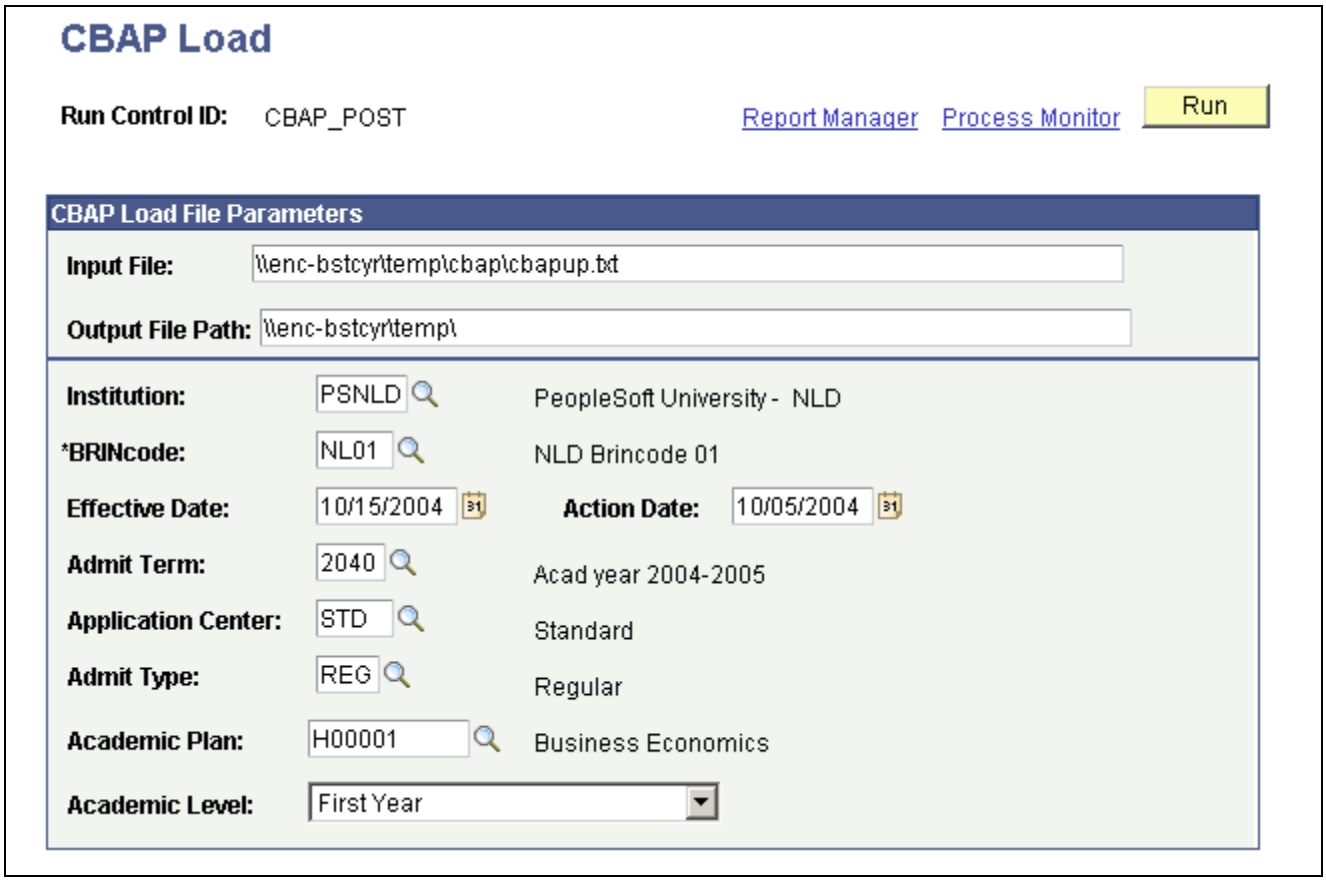
This section discusses how to load CBAP.

Page Used to Load CBAP

Page Name	Object Name	Navigation	Usage
CBAP Load	SAD_CBLOAD_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Load	Use the CBAP Load/Edit parameters to define parameters required for loading data from a CBAP data load, as well as to designate the location of the CBAP file you will be loading. It is recommended that you complete the full loading, search/match and posting before loading a new set of CBAP data.

Loading CBAP

Access the CBAP Load page



CBAP Load page

Store the CBAP suspense file in an accessible network or local directory. The CBSP file contains personal data; data about prior education, information about the school; academic program and location to which the student wishes to apply for admission.

Warning! The loading, search/match and posting cycle needs to be completed for one file before loading the next file.

Input File Indicate the location (directory path) and file name where the CBAP file resides. After the location has been entered the file can be loaded using the Load Process.

Output File Path Indicate the location (directory path) where any output that may be generated will be logged.

Institution Enter the Academic Institution for which you want to load data from the CBAP file into the suspense tables. The CBAP Load process places the institution value you select into a different records as defined by the process itself. This value defaults to the CBAP Suspense tables, where you can then edit it in the CBAP Suspense page. Institution values are defined on the Academic Institution Component. The institution should match the institution for the BRINcode in the upload file delivered.

BRINcode The posting process will use this code only. The CBAP Load will match the external subject defined, with the Campus/Brincode setup which has been

tied to the Academic Institution. Brincodes are setup in the Netherlands Academic Structure component group.

Effective Date The effective date or date from will be used as the effective date for applications and withdrawals in admissions and enrollment records. For the update of personal data, names and addresses the process will use the system date as the effective date. If the process tries to enter a withdrawal and finds an effective date, which is a date after the effective date used on this page, the interface will use the date found in the system and not the date entered here.

Action Date The system records and displays the Action Date to track the date the information was actually updated. The CBAP Load process will write this value to all records containing the Action date field for this applicant. This value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense page.

Admit Term The Admit Term will be displayed for the term the applicant applies for. The CBAP Load process will write this admit term value in every record with the Admit Term field in it. This value defaults to the CBAP Suspense file, where it can be later changed in the CBAP Suspense page.

Application Center Enter the Application Center where this application will be processed. This information helps you track what office is handling specific applications. Values for this filed are defined on the Application Center Table. This is an user default field. The value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense panel group.

Admit Type Enter the Admit Type for this applicant regarding this application. For example, you may have values such as “First-Year and Transfer”. The CBAP Load process will write the admit type to every application record found in the CBAP file. Values for this field are defined on the Admit Type Table. This is an user default field. This value defaults to the CBAP Suspense file, where it can later be changed in the CBAP Suspense pages.

Academic Plan The academic plan will be entered in the plan data for this student if no standard plan is used or defined by the system. An Academic Plan can be any area of study, such as English, Math, Physics, or Undeclared. Values for this field are defined on the Academic Plan Table. This is an user default field. This value defaults to the CBAP Suspense file, where it can later be changed in the CBAP Suspense pages.

Academic Level The CBAP Load process maps the academic level to the academic level field in CRI-HO. This level will be used later in the process of sending information to the Central Register of Higher Education in the Netherlands. When the system is checking to see if an applicant is allowed to be withdrawn, it will not allow the withdrawal if the applicant’s academic level is different then the one entered on this page. This value defaults to the CBAP Suspense file and can be changed once in the CBAP Suspense pages. The values for the academic level fields are delivered with the system as translate values.

Purging CBAP

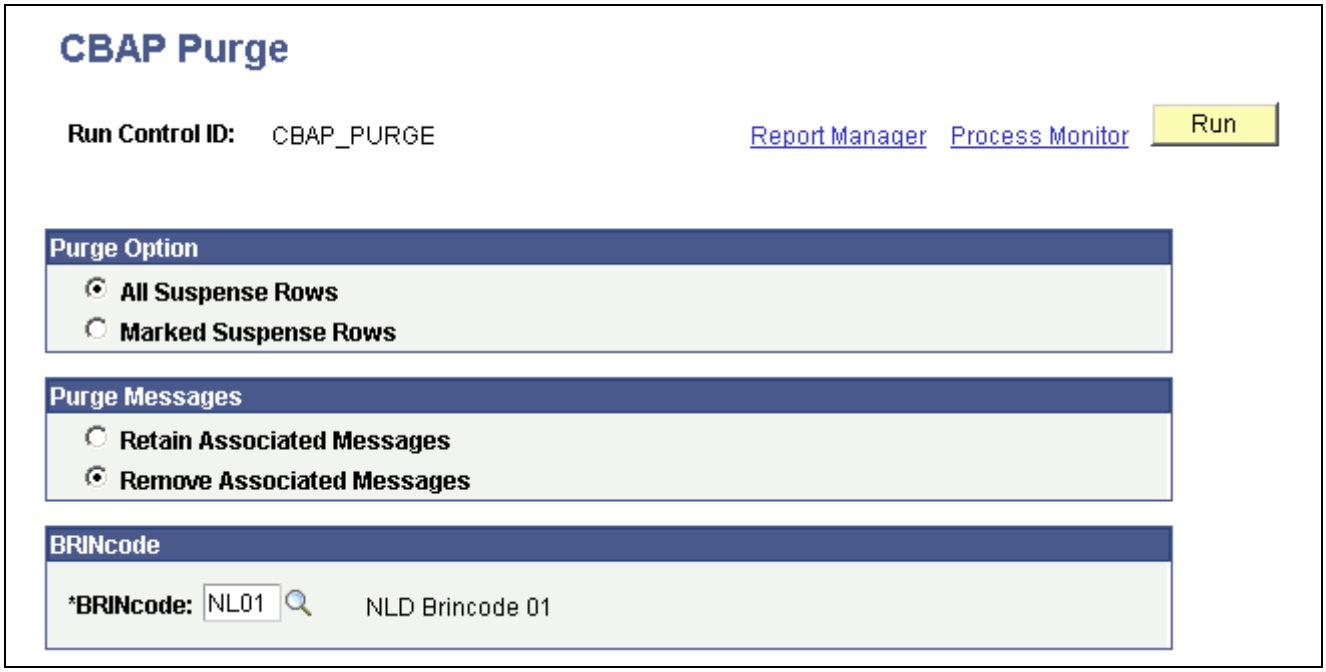
This section discusses how to purge CBAP.

Page Used to Purge CBAP

Page Name	Object Name	Navigation	Usage
CBAP Purge	SAD_CBPURG_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Purge	Use the CBAP Purge process to purge CBAP Suspense file records and their associated processing messages from your database baed on the processing parameters you define on this page.

Purging CBAP

Access the Purge CBAP page.



CBAP Purge page

Purge Option

All Suspense Rows Select this option to purge all data in the suspense file. Use this criteria if you do not plan to go through your CBAP Suspense records. You can purge these records whether or not you have errors and regardless of the value selected for the Post field on the Processing Options page.

Marked Suspense Rows Select this option when all records marked “clean/purge” should be purged from the suspense table.

Purge Messages

Retain Associated Messages Select this option if the error messages should be saved. The messages are related to the CBAP suspense rows you have selected to purge.

Remove Associated Messages Select this option to purge the CBAP error message files.

Brin Code

A code that is assigned to all Dutch Institutions by the Dutch Ministry of Education, and it is mandatory that this code be used in all official communications with the Ministry.

Posting CBAP

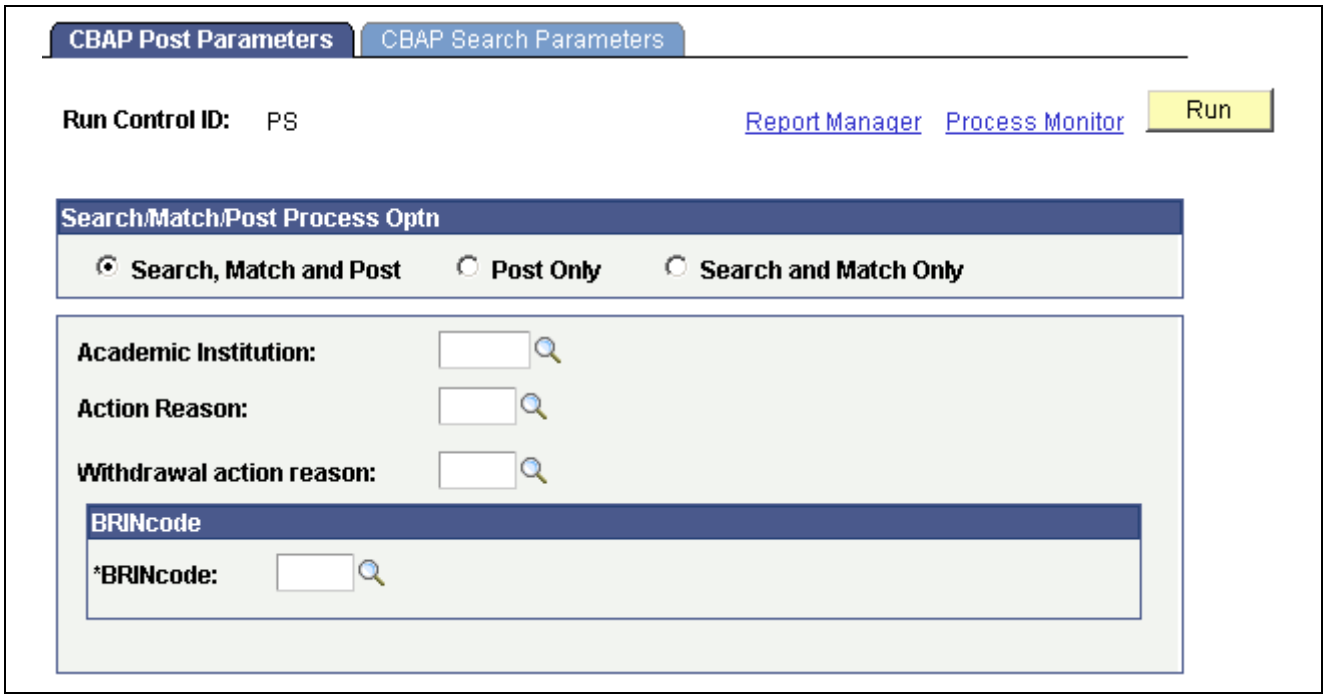
This section discusses how to post CBAP.

Pages Used to Post CBAP

Page Name	Object Name	Navigation	Usage
CBAP Post Parameters	SAD_CBPOST_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Post	Use the CPAB Post parameters to post CBAP external data. You need to set up the search/match/post parameters in order for the CBAP Post process to function.
CBAP Search Parameters	SEARCH_PARMS	Student Admissions, Processing Admissions NLD, CBAP Post, CBAP Search Parameters	For this page, the search match criteria must be setup for CBAP. The standard search match method, which contains a set of search match rules, is selected by the user. The settings can then be selected in order to indicate which action will be taken in the instance of one or more student actions for the found rule. **Note.** The standard search match rules are used as are provided in standard PeopleSoft HR (SOA). This means that next to the provided set of search match rules, new ones can be created in standard PeopleSoft for usage at CBAP as well.

Establishing CBAP Post Parameters

Access the CBAP Post Parameters page.



CBAP Post Parameters page

Search/Match/Post Process Optn

Search, Match and Post Select this option to upload the suspense table and post the suspense table content.

Post Only Select this option to directly post only.

Search and Match Only Select this option to only execute search/match using the suspense table. These actions will not process/post the suspense data.

Academic Institution Use the CPAB Post parameters to post CBAP external data. You need to set up the search/match/post parameters in order for the CBAP Post process to function.

Action Reason Select the action reason that should be used to add an admissions row to the database.

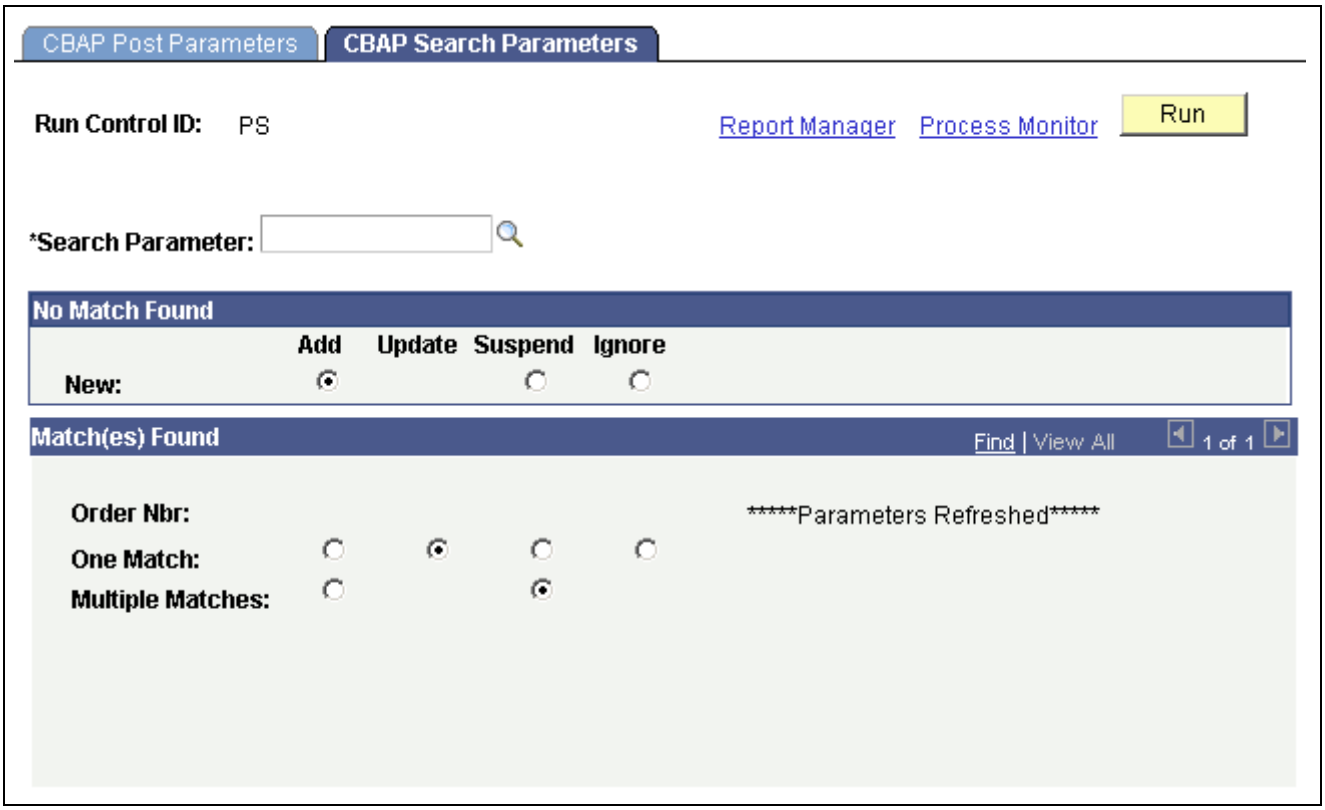
Withdrawal action reason Select the withdrawal action reason that should be used to add a withdrawal row to the database.

BRINcode

Select the BRINcode, indicate for which BRINcode the suspense data should be processed. This is a code that is assigned to all Dutch Institutions by the Dutch Ministry of Education and is mandatory that this code be used in all official communications with the Ministry.

Establishing CBAP Search Parameters

Access the CBAP Search Parameters page.



CBAP Search Parameters page

Search Parameter Select the search parameter code that includes the search fields you need to use to perform the search. The search parameter prompt only allows you to select the search parameters you have been giving access to.

Search/Match Functionality

When CBAP data has been loaded into the suspense table, the user must enter the right search/match criteria in the CBAP search/match criteria panel. These settings will indicate when a new record should be added or if data in the suspense table should be used to update existing data. The settings also determine which data should be ignored for processing. After the search/match settings have been chosen, the same parameters can be used to post the CBAP data. Both processes can be run simultaneously (search/match and immediate posting). The user can also chose to first run a search/match and then run the posting process afterwards.

The search/match process will first process all CBAP suspense data with action code zero. All other action codes (such as withdrawal, change, cancel) update current applicants by adding new effective-dated rows to their existing records. Action codes are found on the CBAP file itself and loaded into the suspense file through the CBAP Load process. The search/match process should not fail if no effective-dated row is found for an action code other than zero. It should always find someone with the same information in the CBAP file. The process will affect an order by on the correspondence number. It will do so in order to determine which students are present in the suspense table with multiple action codes. That is, if the same correspondence number appears more than once in the CBAP file, it means that there is more than one row for this applicant, therefore more than one action for this applicant. If the search/match process finds an action of 0 plus an additional action, it will perform both actions.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Searching for Records and Using Search/Match," Understanding the Difference Between Search Box Search and Search/Match.

No Match Found

Search/Match Parameters	Add	Update	Suspend	Ignore
When the data is posted and the search/match process does not find an equivalent record, please select one of the options under heading new.	Add the record to the database, including personal data.		Add the data to the suspense table only.	Ignore the CBAP data completely and delete this record. Do not add to suspense table or core tables.
In the component with uploaded data, select each sequence number (one record in suspense table) for which an equivalent data element can be found in the core tables, and indicate which action should be taken. The following action can be chosen.	Add a new record to the core tables using the CBAP suspense record	Update the existing record in the core tables using the CBAP suspense record.	Postpone the equivalent CBAP suspense record; it will only be added to the suspense table.	Ignore the CBAP suspense record, it will be removed and not processed to the suspense table or the core tables.
Select the sequence number for which the system has found more potential matches in the core tables. The following action can be chosen.	Add a new data record to the core tables using the CBAP suspense record.		Postpone the equivalent CBAP suspense record; it will only be added to the suspense table.	Ignore the CBAP suspense record, it will be removed and not processed to the suspense table or the core tables.

Match(es) Found

When a match is found, the suspense records is processed for all CBAP codes, if the found search match rule is set to action update (search match parameters). All relevant data related to the provided CBAP action code will be updated. If it was manually set to add, or if the search match rule has been set to add, a new record will be created only for CBAP action codes 0, 8, or D. Otherwise the suspense record will not be processed, but will be suspended for manual correction.

CHAPTER 20

Evaluating Applicants

After you have entered all the necessary information for an applicant, you are ready to evaluate the applicant and related application materials.

This chapter provides an overview of the evaluating applicants business process and discusses how to:

- Create general evaluations.
- Enter and update general evaluator ratings.
- Create application evaluations.
- Enter and update evaluator ratings for an application.

Understanding the Evaluating Applicants Business Process

This section lists prerequisites and discusses the evaluating applicants business process.

Prerequisites

Before you begin evaluating applicants, applications must be fully entered into your system. Depending on your office procedures, you will add evaluations at different times during the year. Although not all of the following information is required to run evaluations, the following list can serve as an overview of the pertinent data that can be entered, and thus considered, for an application:

- Applicant demographics.
- Applicant address.
- Application program data.
- Application data.
- Application recruiting data.
- External education data.
- Test results.
- General materials.
- Application materials.
- Early financial aid offer information.

Evaluating Applicants Business Process

There are many ways you can use your system to evaluate applicants. PeopleSoft Recruiting and Admissions provides SQR processes that enable you to automate much of your business process. You can also use PeopleSoft Recruiting and Admissions to evaluate applicants manually. In fact, many combinations of manual and automated processes can work. Therefore, before evaluating applicants, decide how you want to use your system to evaluate applicants.

Regardless of whether you choose to evaluate applicants manually, through SQR processes, or through a combination of manual and automated processing, you must define rating schemes and the rating components that make up rating schemes. You must also define:

- Evaluation codes.
- Evaluation committees (if applicable to your evaluation business process).
- Evaluation status codes.

After you have set up the process for evaluating applicants, you are ready to perform the evaluations. This is where you have the most options regarding manual processing versus automatic processing. Performing applicant evaluations involves:

- Assigning evaluation codes to applicants.
- Linking materials (such as recommendations, essays, portfolios, and so forth) to applications.
- Assigning committees (which consist of the evaluators who physically evaluate the applicants).
- Entering evaluator ratings.
- Retrieving and evaluating objective ratings (such as test scores and GPA) from the applications.

After you have defined rating schemes, evaluation codes, committees, and evaluation statuses, you are ready to evaluate the applicants. Depending on the evaluation code/rating scheme structure that your institution uses, there are many ways to evaluate applicants. This book limits the discussion to the tools that you can use to fulfill your specific needs. These tools include:

- General evaluations and general evaluator ratings.
- Application evaluations and application evaluation ratings.
- An automated method for assigning evaluation components.
- An SQR process for linking application materials to applications.
- An SQR process for entering rating values.
- An SQR process for evaluating applicants based on rating values, and for updating application evaluation statuses.
- A COBOL process for calculating enrollment deposits.
- A COBOL process for activating applicants as students.

Use these tools to assign evaluation codes to applications, to enter and retrieve rating component values, to enter or have the system calculate overall rating values, to evaluate the applicant based on those overall rating values, and to update the applicant's program status.

Automatic Versus Manual Processing

The following table presents the steps that can be performed manually or automatically:

Task	To execute automatically	To execute manually
Assign evaluation codes.	Evaluation Code Assignment process ADEVALCD.SQR	General Evaluations component or Application Evaluations component.
Link application materials.	Application Materials Extract process ADMTEXT.SQR	Application Materials page.
Enter rating values for rating schemes and rating components.	For objective rating components: Evaluation Calculation process ADMTLRTG.SQR	For subjective rating components: General Evaluator Ratings component or Application Evaluator Ratings component.
Evaluate applicants based on rating values, and update application evaluation statuses.	Application Status Update ADMTLPGS.SQR	General Evaluations component or Application Evaluations component.
Calculate enrollment deposits.	When you update application evaluation statuses in batch: SFPBADEP (COBOL SQL)	Calculate Deposit Fees link on the Application Program Data page.
Activate applicants as students.	When you update application evaluation statuses in batch: ADPCPPRC (COBOL SQL)	Application Program Data page in the Application Maintenance component.

Your institution can rename the processes listed in the above table. You can also add to or edit the SQCs for the SQRs listed above. Check with your system administrator for more information about the specific SQRs and SQCs used by your institution.

General Versus Application Evaluations

To assign evaluation codes manually, you must create an evaluation for each applicant. There are two sets of components that you can use to create evaluations for an applicant.

- Use the General Evaluations and General Evaluator Ratings components to create *general* evaluations.

  General evaluations are *not* tied to a career, program, or application number. Therefore, use general evaluations to evaluate applicants on general criteria that are not required by a particular career or program (such as a statement of purpose that the institution requires, regardless of the career or program the person is applying to). In addition, because general evaluations are not tied to application numbers, you can use general evaluations to evaluate individuals (such as prospects) without having to enter an application.

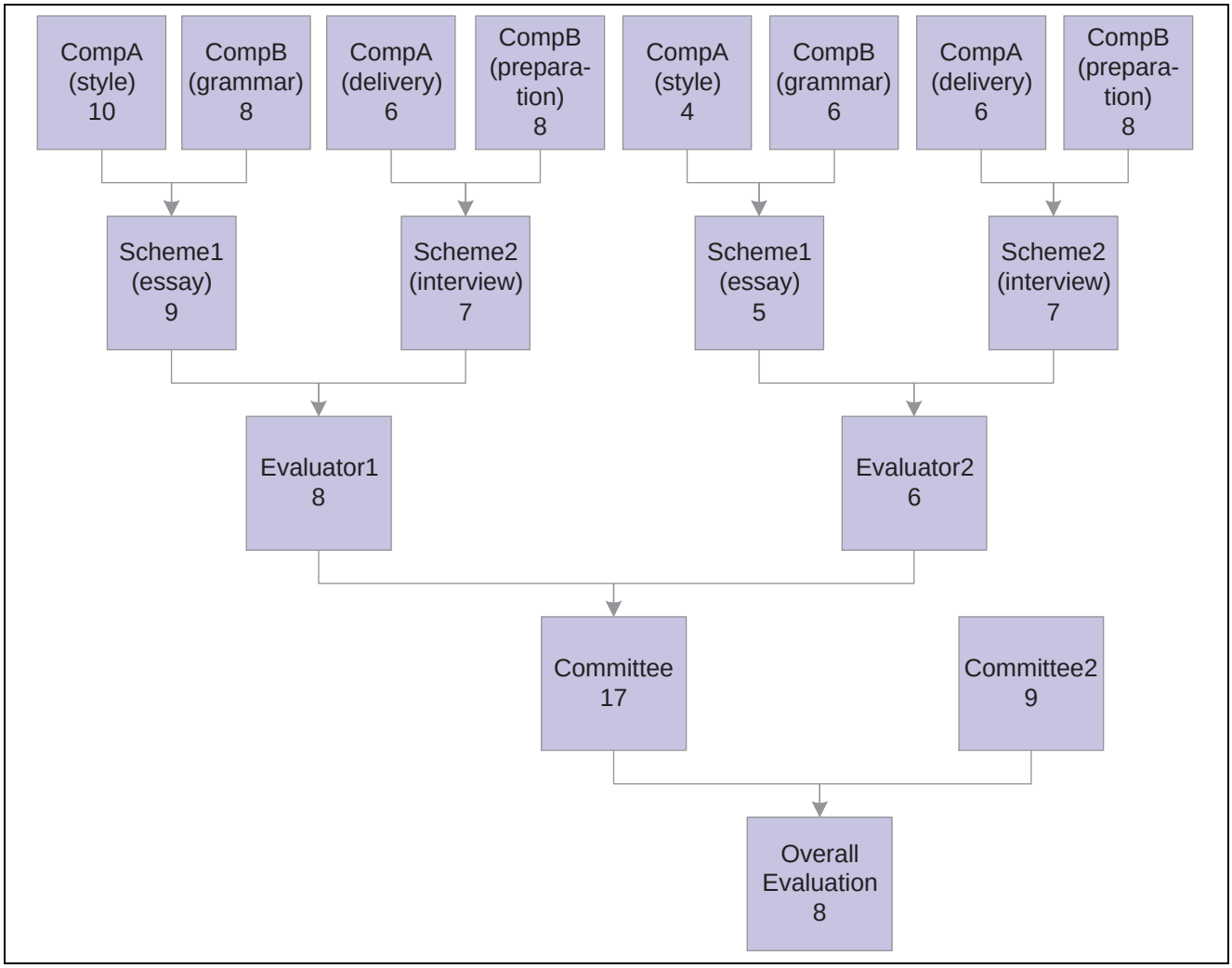
- Use the Application Evaluations and Application Evaluator Ratings components to create *application* evaluations.

  Application evaluations are tied to a career, program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the career and program to which they are applying.

You can evaluate an applicant using both of these sets of components if you desire. You would also use these components to enter ratings. You can enter the ratings manually, or you can use the Application Evaluation process to retrieve and evaluate objective scores, and then enter rating values. If you enter ratings manually, you would use the Application Evaluator Ratings or the General Evaluator Ratings page. If the Application Evaluation process retrieves the ratings, they would appear on the Overall Ratings page in the Application Evaluation component.

Understanding Automatic Overall Rating Calculation

Your PeopleSoft Recruiting and Admissions application is equipped with a background process that averages evaluator ratings and overall ratings. Therefore, you only have to manually enter rating values at the rating component level. The system averages those ratings and populates overall ratings at the next higher level. The system continues to average overall ratings until you have an overall rating for the application. The following chart illustrates the hierarchical structure of this background process:



Illustrating the hierarchical structure

You must first enter rating component rating values. The system then calculates the overall rating value for the scheme. After all of the overall rating values for the scheme have been calculated, the system calculates the overall rating value for the evaluator, and so on.

For example, suppose you assigned two committees to evaluate an applicant. One committee is to evaluate essays and interviews, and the second committee is to evaluate other materials (for simplicity we will not look at the details of the second committee). The first committee consists of two committee members (or evaluators). Each evaluator evaluates two schemes: the undergraduate essay and the undergraduate interview. The evaluators evaluate the style and grammar components of the undergraduate essay scheme, and they evaluate the delivery and preparation components of the undergraduate interview scheme.

1. First, the evaluator enters ratings for each *component* in each scheme.

   In the example in the diagram above, the first evaluator entered 10 for style and 8 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. The second evaluator entered 4 for style and 6 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. For the system to calculate the averages, you must enter values at this level first.

2. When the evaluators saved the pages, the system calculates the averages for each *scheme* and populates the Overall Rating fields on the General Evaluator Rating page or the Application Evaluator Rating page, depending on the type of evaluation.

   In our example, the overall rating for the first scheme for Evaluator1 is 9 (the average of 10 and 8), and the overall rating for the second scheme for Evaluator1 is 7 (the average of 6 and 8). The overall rating for the first scheme for Evaluator2 is 5 (the average of 4 and 6), and the overall rating for the second scheme for Evaluator2 is 7 (the average of 6 and 8).

3. After each scheme has an overall rating value, the system populates the overall rating for the *evaluator* (after you save the page) and populates the Overall Rating field on the Evaluator Ratings page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

   In our example, the overall rating for Evaluator1 is 8 (the average of 9 and 7), and the overall rating for Evaluator2 is 6 (the average of 5 and 7).

4. After each evaluator has an overall rating value, the system populates the overall rating for the *committee* (after you save the page) and populates the Overall Rating field on the Evaluation Committee page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

   In our example, the overall rating for Committee1 is 7 (the average of 8 and 6), and let's say that the overall rating for Committee2 is 9.

5. After each committee has an overall rating value, the system populates the overall rating for the application (after you save the page) and populates the Overall Rating field on the General Evaluation or Application Evaluation page, depending on the type of evaluation.

   In our example, the overall rating for the application is 8 (the average of 7 and 9).

Remember that you must start at the first step. If you manually enter overall ratings for a scheme, for instance, without entering components, you will break the chain and the system will not calculate averages at any level. In other words, the system only calculates overall ratings at any given level if it had calculated the overall ratings at every level below that one.

Creating General Evaluations

This section discusses how to:

- Assign an evaluation code to a general evaluation.
- Link general materials to an application.
- Assign a committee to a general evaluation.

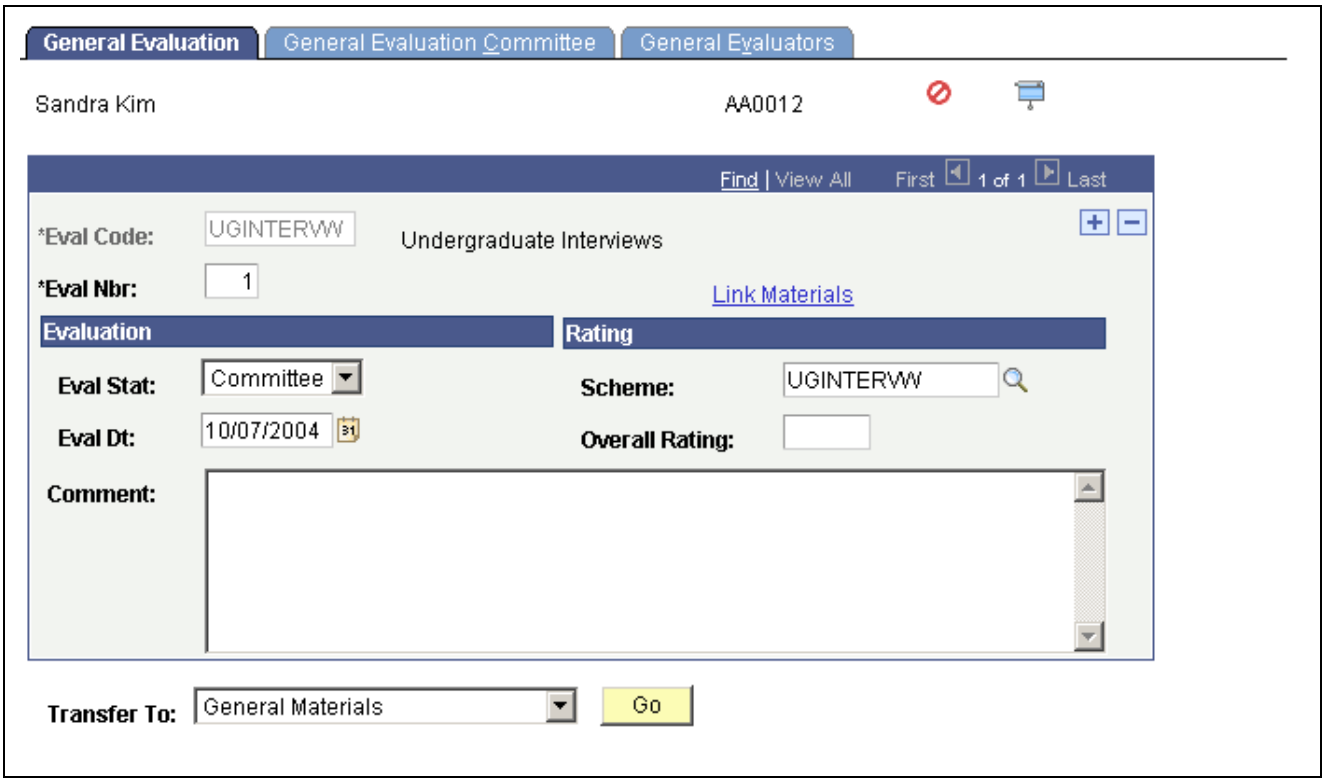
- Assign evaluators to a general evaluation.

Pages Used to Create General Evaluations

Page Name	Object Name	Navigation	Usage
General Evaluation	GENL_EVAL1	• Student Recruiting, Evaluate Prospects, General Evaluations • Student Recruiting, Evaluate Prospects, Student Admissions, Application Evaluation, General Evaluations	Assign evaluation codes and to enter high level, general information about a person. The evaluation code populates various fields in this component with default information (such as rating schemes and committees). You can also link general materials to an evaluation from this page.
Select General Materials	GENL_MATL_POPUP	Click the Link Materials link on the General Evaluation page.	Link general materials to a general evaluation.
View Assigned Materials	MATL_EVAL_POPUP	Click the appropriate Detail button on the Select General Materials page.	View details about a Material Type.
General Evaluation Committee	GENL_EVAL2	• Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluation Committee • Student Admissions, Application Evaluation, General Evaluations, General Evaluation Committee	Assign general evaluation committees to a general evaluation. The overall ratings of the committees you assign are also stored on this page.
General Evaluators	GENL_EVAL3	• Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluators • Student Admissions, Application Evaluation, General Evaluations, General Evaluators	Assign evaluators to a general evaluation, and to record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to a General Evaluation

Access the General Evaluation page.



General Evaluation page

Eval Code (evaluation code) Select the evaluation code to be used to evaluate this person. Other fields on this page (such as Scheme) populate according to the evaluation code you select. This is where you assign evaluation codes to evaluations manually. Define evaluation codes on the Evaluation Table page.

Eval Nbr (evaluation number) The evaluation number default is *1* for the first general evaluation you enter, *2* for the second, and so on.

Eval Stat (evaluation status) Select the current evaluation status of this general evaluation. Define evaluation status codes on the Evaluation Status Table page.

Eval Dt (evaluation date) The default for the evaluation date is your system date.

Scheme Select the rating scheme you want to use for this general evaluation. If the evaluation code entered on this page is linked to a committee rating ID scheme, that scheme appears automatically. Define rating schemes on the Rating Scheme Table page.

Overall Rating If you are using rating schemes, and if you entered all the evaluator ratings for every committee linked to this person, this value appears automatically. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each committee are stored on the General Evaluation Committee page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate prospects and applicants, you can enter an overall rating manually.

See Chapter 20, "Evaluating Applicants," Evaluating Applicants Business Process, page 378.

Note. This value does not include rating values that were retrieved and calculated by the Evaluation Calculation process.

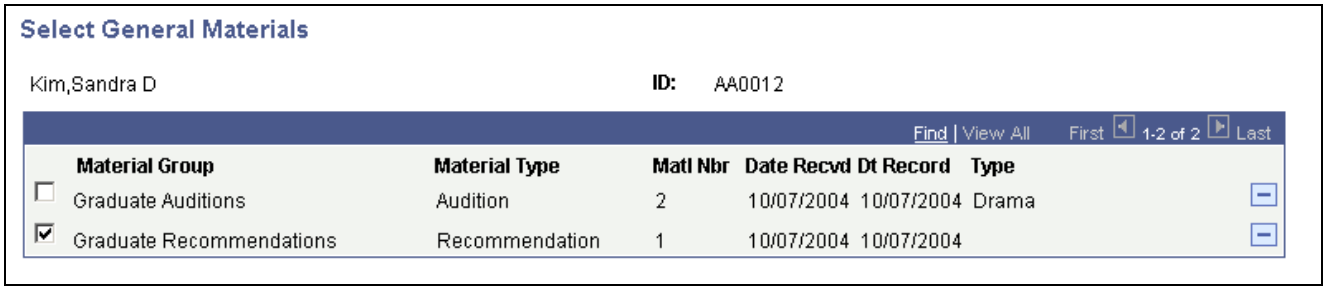
Link Materials Click this link to link general materials to this general evaluation. This link is available only after you save the page, provided there are general materials stored for this person. You can only choose from the general materials that are linked to this person. The Select General Materials Page appears.

View Materials Click this link to view the general materials that are linked to this general evaluation. This link is available after you save the page, provided that you have linked materials to this general evaluation on the Select General Materials page. The View Assigned Materials Page appears.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Linking General Materials to a General Evaluation

Access the Select General Materials page.

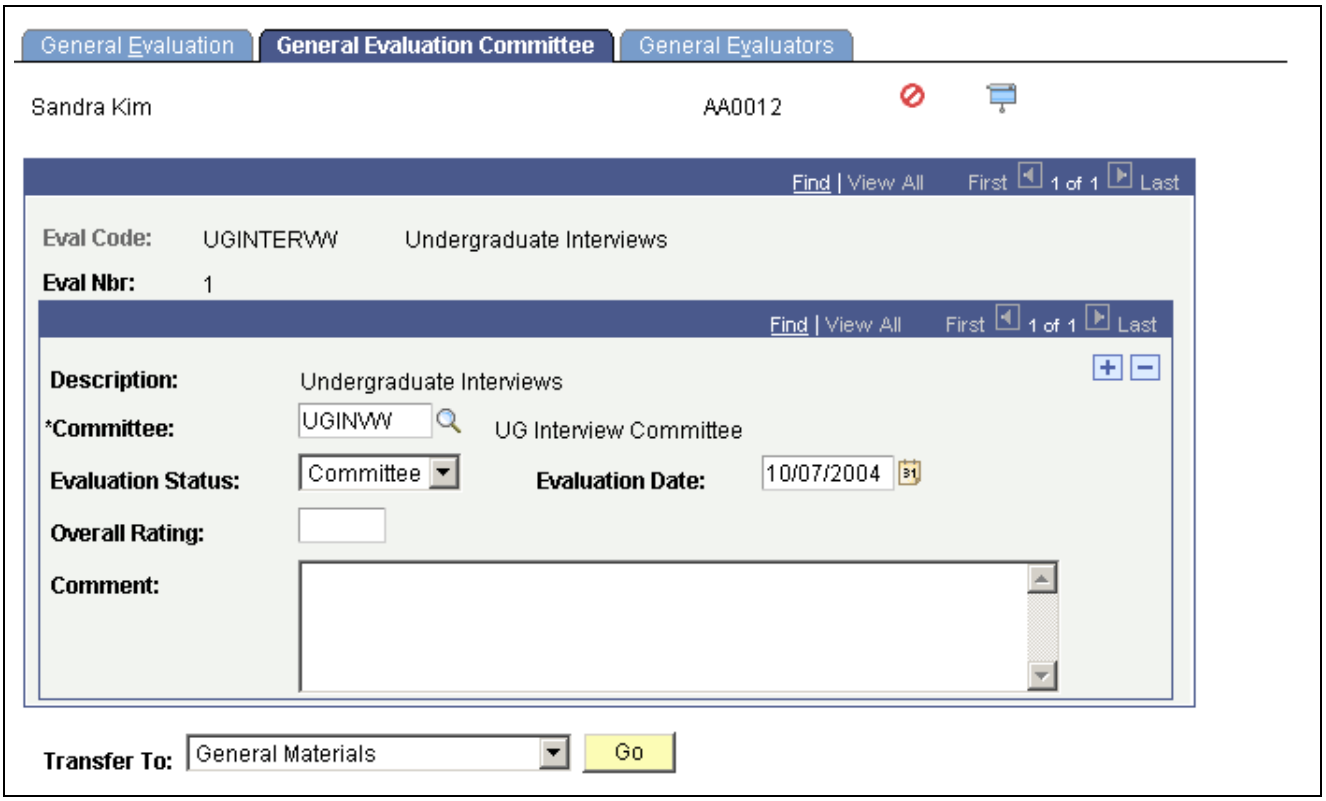


Select General Materials page

Material Type Select the material type you want to link to this evaluation.

Assigning a Committee to a General Evaluation

Access the General Evaluation Committee page.



General Evaluation Committee page

Committee The system populates the committee if the evaluation code for this general evaluation has an evaluation committee assigned to it. You can add committees if desired.

Note. To create general evaluations, you must assign an evaluation committee. However, an evaluation committee can be made up of only one person.

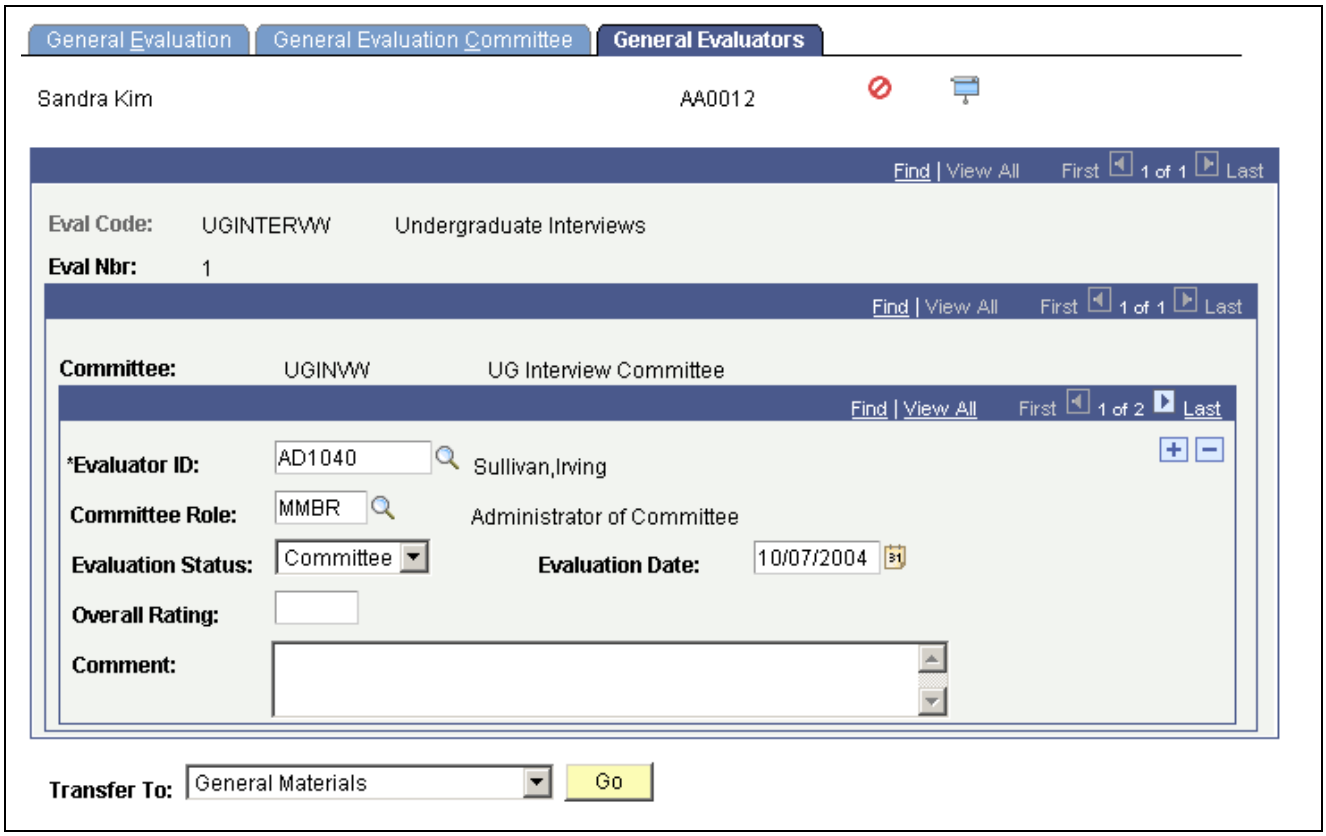
Evaluation Status Select the evaluation status reflecting the current status of this committee's evaluation. Define evaluation status codes on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is the system date.

Overall Rating The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator in this committee assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applicants, you can enter an overall rating manually.

Assigning Evaluators to a General Evaluation

Access the General Evaluators page.



General Evaluators page

Evaluator ID Select an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the General Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.

Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the General Evaluation Committee page.

Committee Role Select the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.

Evaluation Status Select the evaluation status reflecting the current status of this evaluator's evaluation. You set up evaluation status codes on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is your system date.

Overall Rating The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the General Evaluator Rating page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applicants or prospects, you can enter an overall rating manually.

See Also

Performing the Evaluating Applicants Business Process

Entering and Updating General Evaluator Ratings

Use the General Evaluator Ratings component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applicants based on rating schemes.

This section discusses how to:

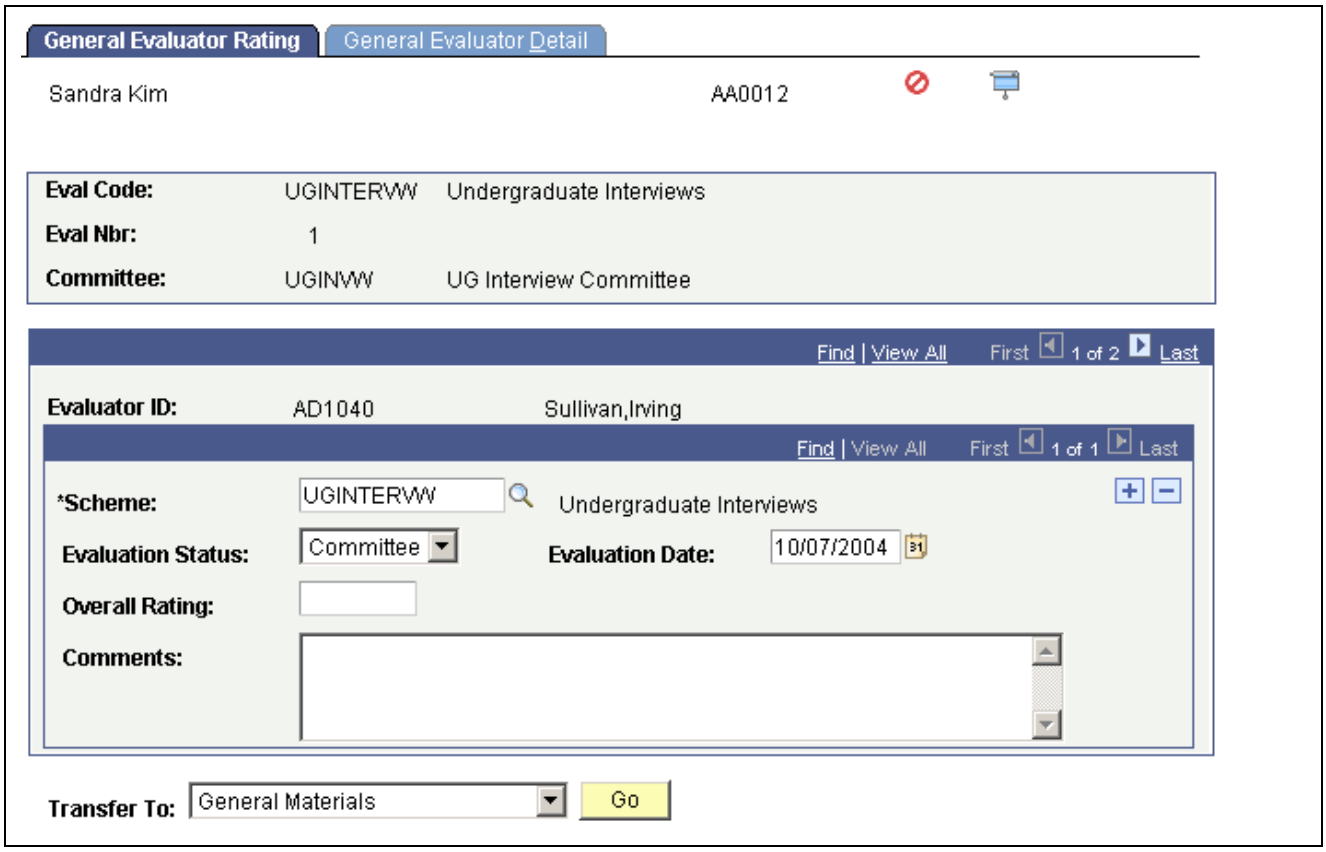
- Enter and update general evaluator overall ratings.
- Enter and update general evaluator ratings of rating components.

Pages Used to Enter and Update General Evaluator Ratings

Page Name	Object Name	Navigation	Usage
General Evaluator Rating	GENL_RATING1	• Student Recruiting, Evaluate Prospects, General Evaluator Rating • Student Admissions, Application Evaluation, General Evaluator Rating	Enter general evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.) You have to first set up an applicant evaluation based on an evaluation code in the General Evaluations component.
General Evaluator Detail	GENL_RATING2	• Student Recruiting, Evaluate Prospects, General Evaluator Rating, General Evaluator Detail • Student Admissions, Application Evaluation, General Evaluator Rating, General Evaluator Detail	Enter an evaluator's ratings of the components for a rating scheme. The system averages and displays the ratings entered here on the General Evaluator Rating page. You must first complete the General Evaluator Rating page.

Entering and Updating General Evaluator Overall Ratings

Access the General Evaluator Rating page.



General Evaluator Rating page

Scheme The system populates the rating scheme according to the rating scheme entered on the General Evaluation page for this evaluation code and for this person. You can add more than one rating scheme for an evaluator.

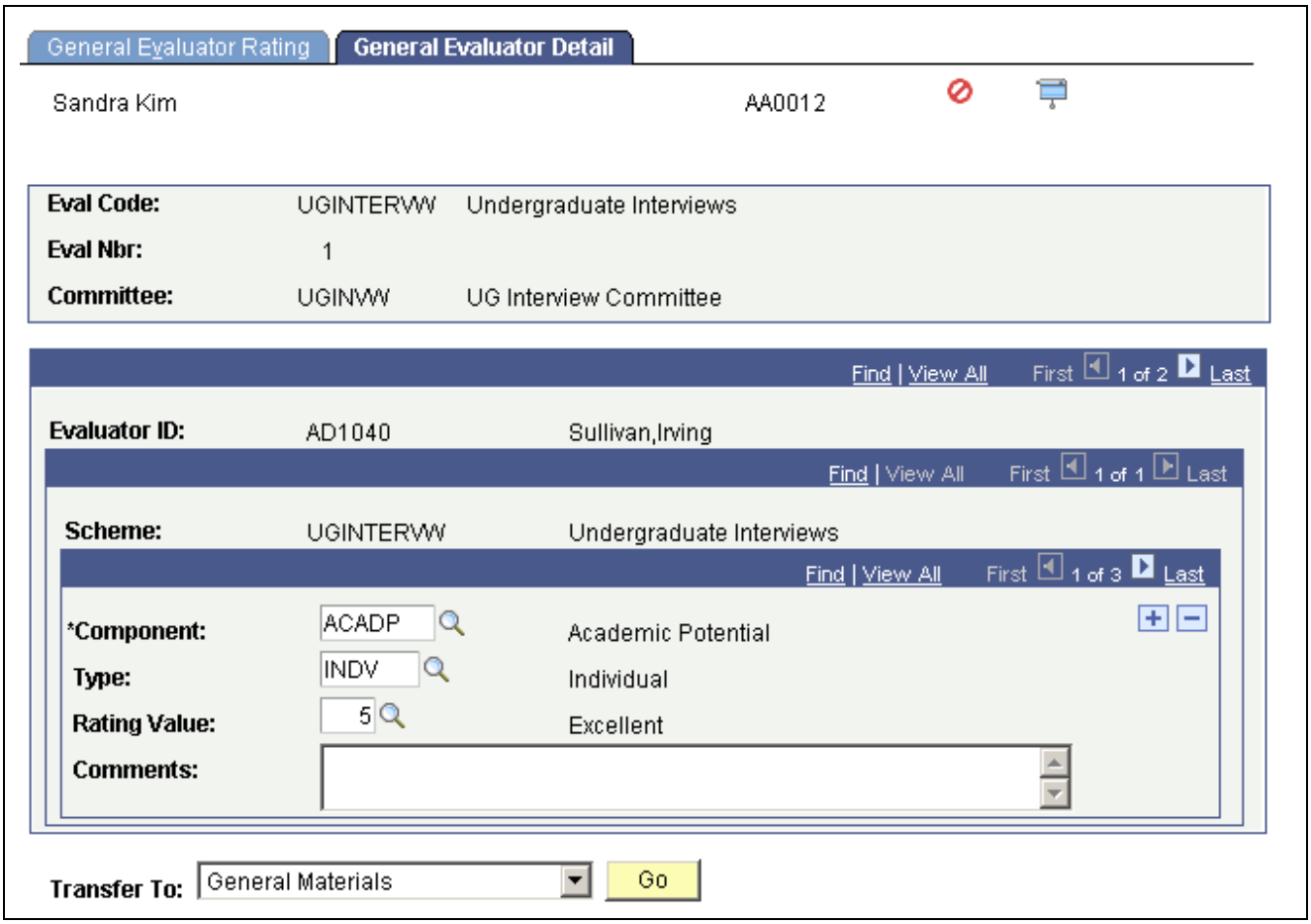
Evaluation Status Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is your system date.

Overall Rating The system automatically calculates the overall rating based on the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the General Evaluator Detail page. You can override this calculation if desired.

Entering and Updating General Evaluator Ratings of Rating Components

Access the General Evaluator Detail page.



General Evaluator Detail page

Component and **Type** The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types if desired.

Rating Value Select a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the General Evaluator Rating page. You must enter ratings on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

Creating Application Evaluations

Use the Application Evaluations component to create *application* evaluations. Application evaluations are tied to an academic career, academic program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the academic career and program that they are applying to.

Use this component to record subjective rating values (such as a rating given by a committee) and objective rating values (such as a test score). If you are using the Automatic Evaluation process to retrieve objective rating values from applications, those rating values appear on the Overall Rating page in this component.

After creating the application evaluation, use the Application Evaluator Ratings component to enter actual evaluator rating values. However, if you are not using rating schemes, you can manually enter overall ratings in the General Evaluations component.

This section discusses how to:

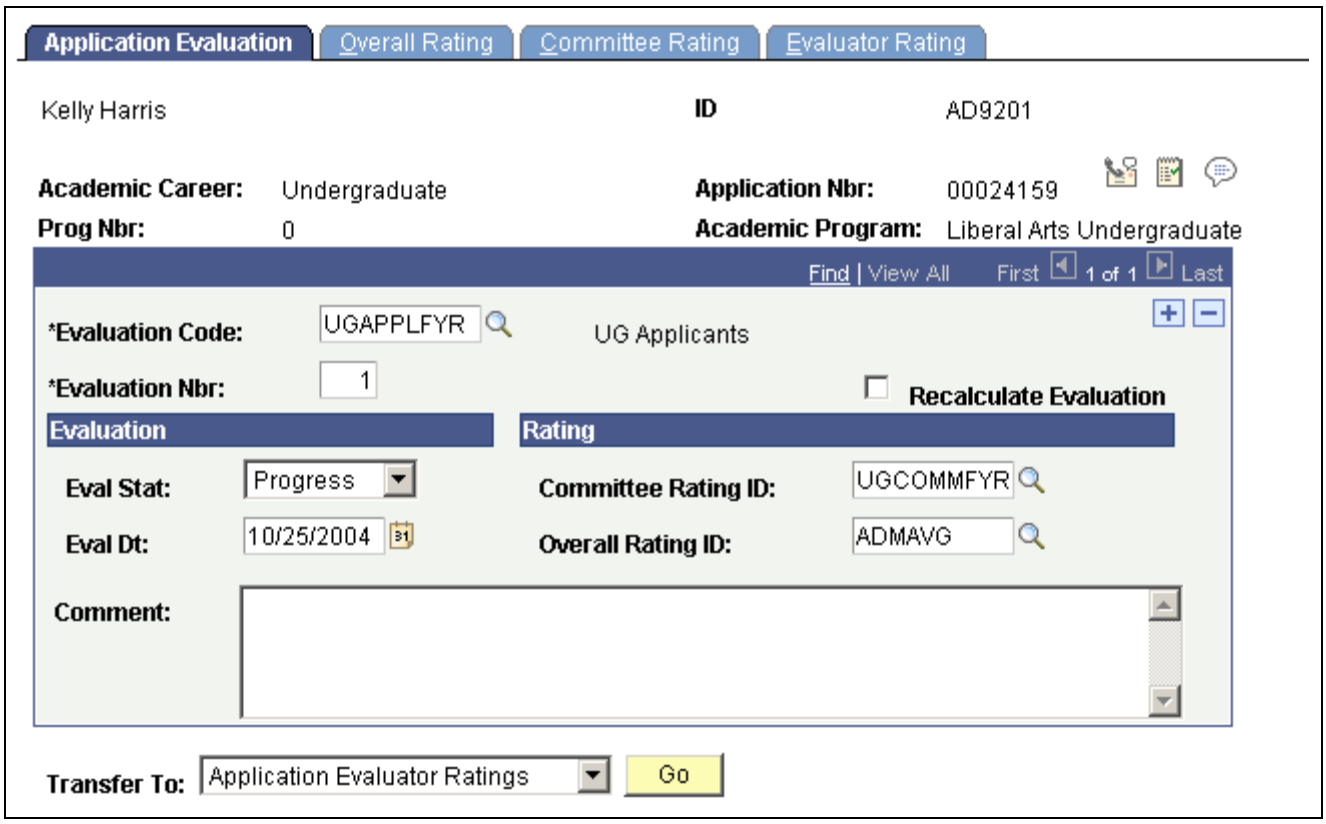
- Assign an evaluation code to an application.
- Enter overall component ratings for an application.
- Assign a committee to an application evaluation.
- Assign evaluators to an application evaluation.

Pages Used to Create Application Evaluations

Page Name	Object Name	Navigation	Usage
Application Evaluation	ADM_EVAL1	Student Admissions, Application Evaluation, Application Evaluation	Assign evaluation codes and to enter high level, general information about an applicant. The evaluation code populates various fields in this component with default information (such as rating schemes and committees).
Overall Rating	ADM_OVERALL_RATING	Student Admissions, Application Evaluation, Application Evaluation, Overall Rating	Manually enter or edit overall rating information for an application evaluation. The Overall Rating page stores objective overall rating information for an application evaluation. Rating values for a rating scheme's components are stored on this page for an application evaluation. Because it is unnecessary for each committee member to evaluate objective information (such as a test score), you can store objective rating values for each application in one place. You can enter the rating values manually, or you can use the Evaluation Calculation process to determine the values.
Committee Rating	ADM_EVAL2	Student Admissions, Application Evaluation, Application Evaluation, Committee Rating	Assign application evaluation committees to an application evaluation. The overall ratings of the committees you assign are also stored on this page.
Evaluator Rating	ADM_EVAL3	Student Admissions, Application Evaluation, Application Evaluation, Evaluator Rating	Assign evaluators to an application evaluation, and record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to an Application

Access the Application Evaluation page.



Application Evaluation page

Evaluation Code Select an evaluation code to be used to evaluate this applicant. Evaluation codes are set up on the Evaluation Table page. This is where you assign evaluation codes to evaluations manually. Evaluation codes can also be assigned automatically using the evaluation code assignment process.

See Chapter 21, "Evaluating Applicants Using Automatic Processing," Assigning Evaluation Codes to Applications in Batch, page 402.

Evaluation Nbr (number) The evaluation number automatically populates as *1* for the first application evaluation you enter, *2* for the second, and so on.

Eval Stat (evaluation status) Select the evaluation status reflecting the current status of this application evaluation. Define evaluation status codes on the Evaluation Status Table page.

Eval Dt (evaluation date) The default evaluation date is your system date. Edit the date if desired.

Committee Rating ID The committee rating ID automatically appears if the evaluation code was defined with a committee rating ID. A committee rating ID is a rating scheme with a type equal to *Committee.* Such schemes evaluate subjective information about an application. If you only want to evaluate objective data, enter an overall rating ID only. You can change the committee rating ID if desired.

Overall Rating ID The overall rating ID automatically appears if the evaluation code was defined with an overall rating ID. An overall rating ID is a rating scheme with a type equal to *Overall.* Such rating schemes evaluate objective information about an

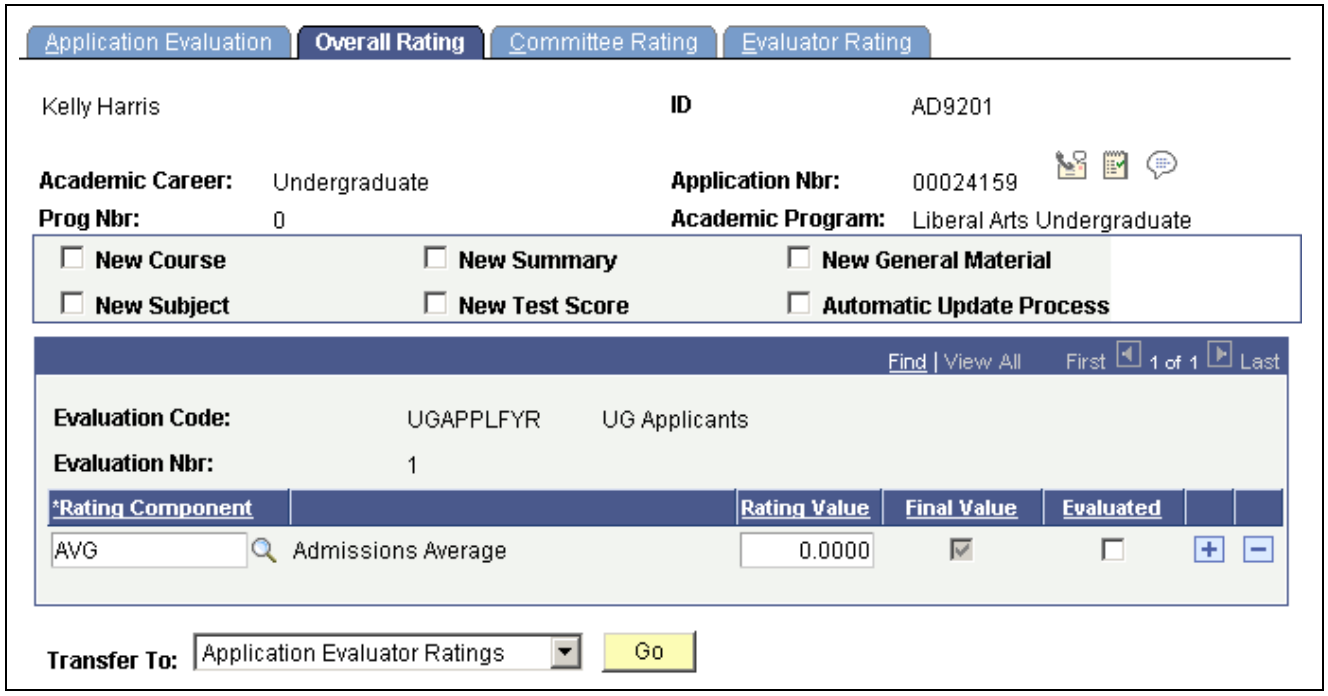
application. If you only want to evaluate subjective data, enter a committee rating ID only. You can change the overall rating ID if desired.

Recalculation Evaluation The system selects this check box if application materials were linked to this application—either manually or through the application materials extract process (ADMTEXT.SQR)—after the application status update process processed this application. This tells the system that even though this application has already gone through the application status update process, it needs to go through it again.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Entering Overall Component Ratings for an Application

Access the Overall Rating page.



Overall Rating page

New Course, New Subject, New Summary, New Test Score, and **New General Material** If a new course, subject, academic summary, test score, or general material is added to this person's record, the system automatically selects their respective check boxes. These check boxes cannot be manually selected.

Automatic Update Process The system selects this check box if one of the other choices in this group box is selected. When this check box is selected, it lets the automatic update process know that this application needs to be considered for processing when you run the application materials extract process. The system automatically sets these flags if a new transcript, test score, or general material is added for the employee ID.

Rating Component The rating components of the rating scheme that you entered in the Overall Rating ID field on the Application Evaluation page appear. You can add new rating components.

Rating Value If you are manually rating these components, enter the rating values for each component that you want to award this application. The Evaluation Calculation process will calculate these values if you are automatically rating these components.

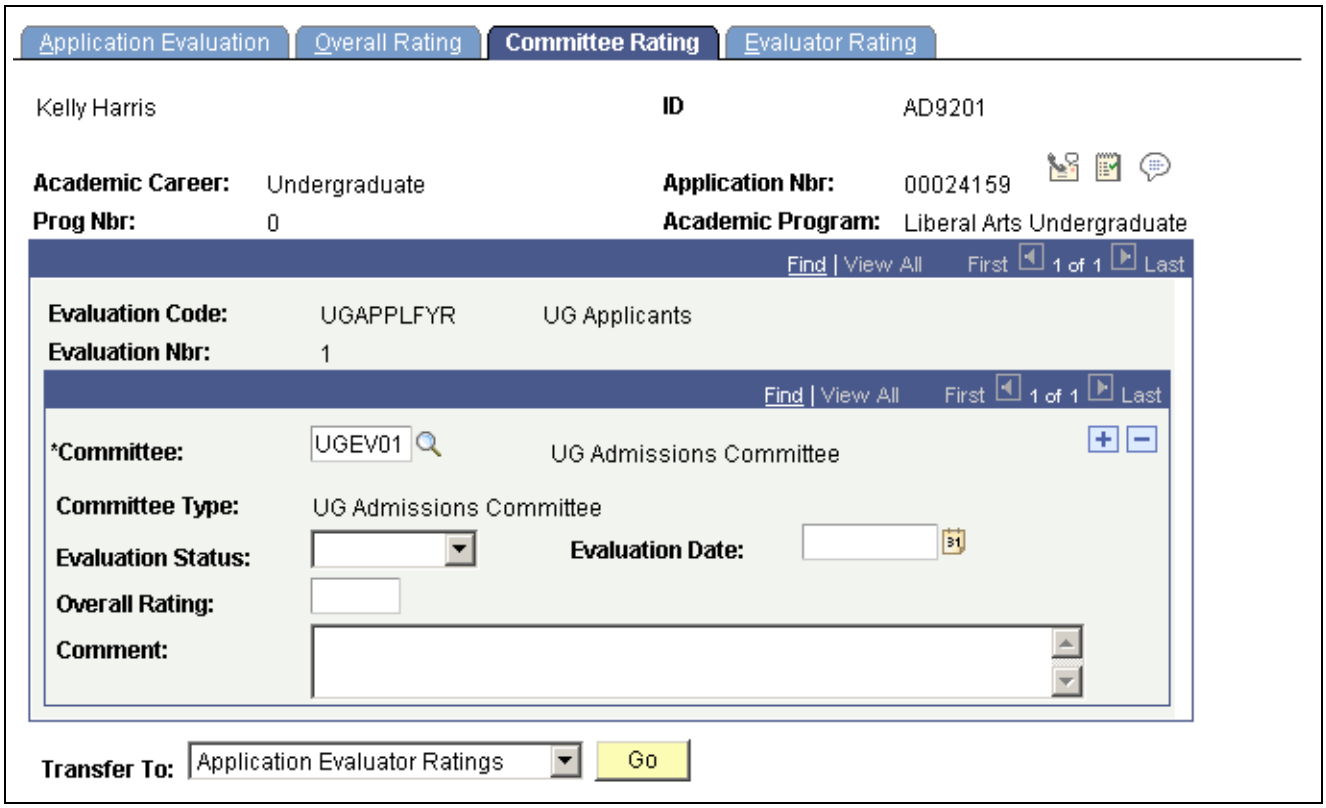
Final Value The system selects this check box if the rating component was defined as a final value component. Final value components are those that are required to be filled before the Evaluation Calculation process processes this application.

Evaluated The system selects this check box if a rating component was evaluated through the Evaluation Calculation process. If you are manually evaluating this component, select this check box after evaluating the component.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Assigning a Committee to an Application Evaluation

Access the Committee Rating page.



Committee Rating page

Committee The system populates the committee if the evaluation code for this application evaluation has an evaluation committee assigned to it. You can add committees if desired.

Committee Type The type of the committee that you select appears.

Evaluation Status Select the evaluation status reflecting the current status of this committee's evaluation. The evaluation code assignment process enters the evaluation status when you assign evaluation codes automatically. Define evaluation status codes on the Evaluation Status Table page.

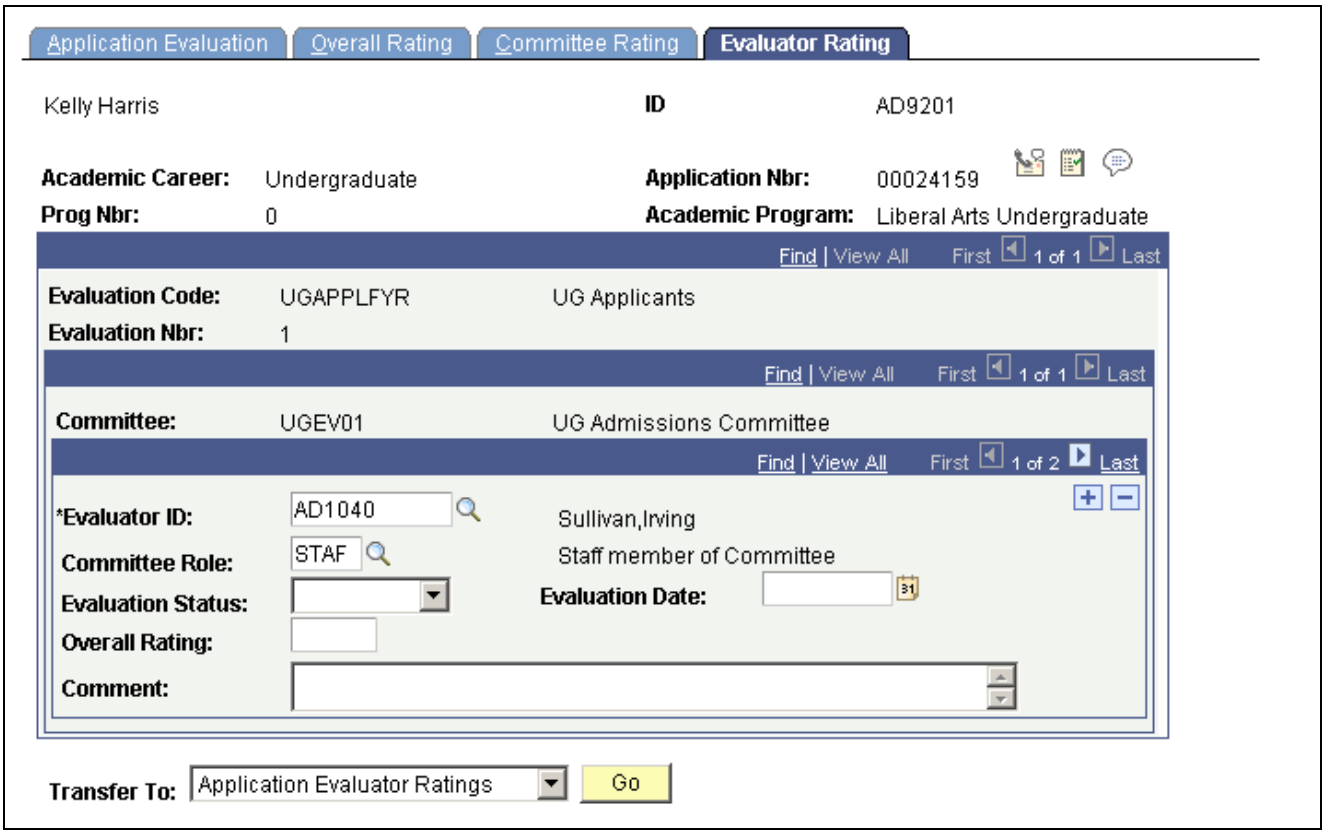
Evaluation Date The default for the evaluation date is the system date. The evaluation code assignment process enters the evaluation date when you assign evaluation codes automatically.

Overall Rating The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Go Select the component that you want to go to for this person and click the Go button. The system takes you directly to the component for this person, application, or prospect record.

Assigning Evaluators to an Application Evaluation

Access the Evaluator Rating page.



Evaluator Rating page

Evaluator ID Select an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the Application Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.

Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the Committee Rating page.

Committee Role Select the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.

Evaluation Status Select the evaluation status reflecting the current status of this evaluator's evaluation. Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is your system date.

Overall Rating The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the Application Evaluator Rating page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings for an Application

Use the Application Evaluator Rating component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applications based on rating schemes.

This section discusses how to:

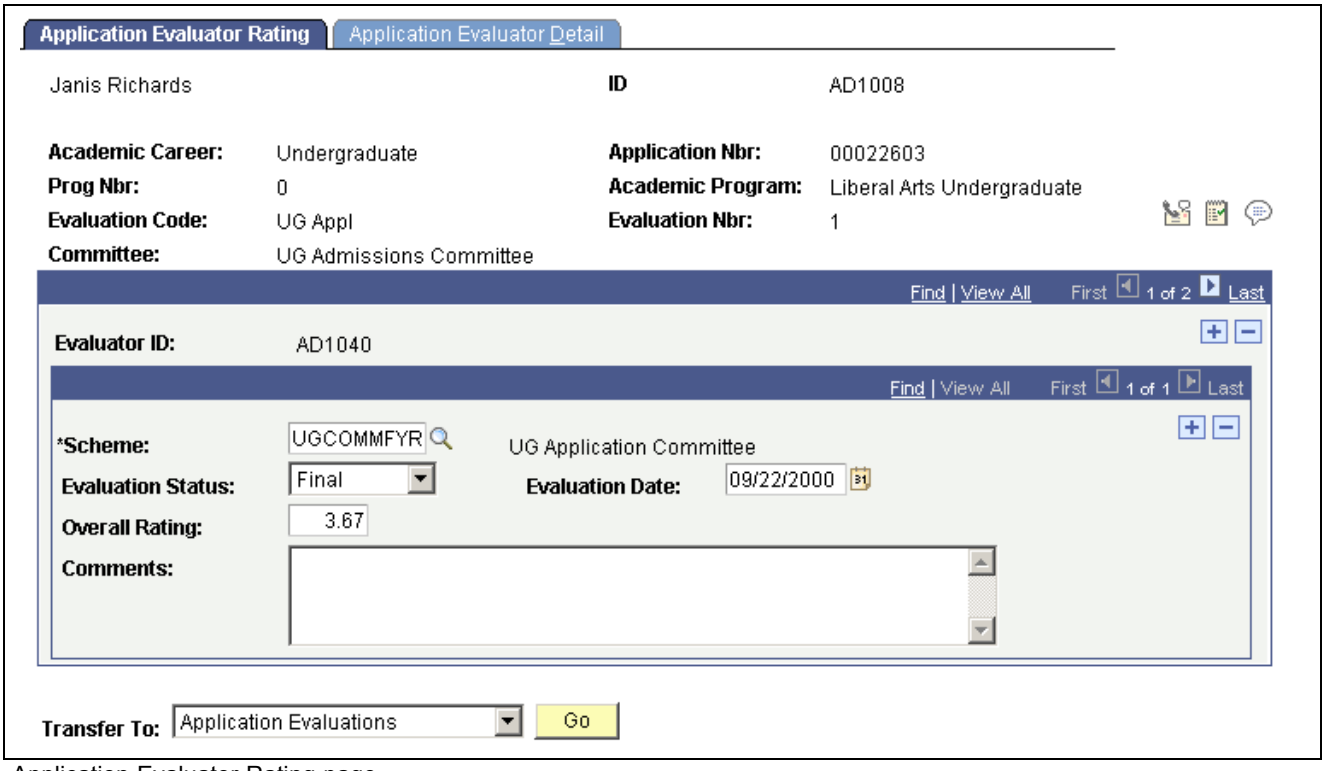
- Enter and update evaluator overall ratings for an application evaluation.
- Enter and update evaluator ratings of individual rating components.

Pages Used to Enter and Update Evaluator Ratings for an Application

Page Name	Object Name	Navigation	Usage
Application Evaluator Rating	ADM_RATING1	Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings	Enter evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)
Application Evaluator Detail	ADM_RATING2	Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings, Application Evaluator Detail	Enter an evaluator's ratings of the components of a rating scheme. The system then averages and displays these ratings on the Application Evaluator Rating page.

Entering and Updating Evaluator Overall Ratings for an Application Evaluation

Access the Application Evaluator Rating page.



Application Evaluator Rating page

Scheme The system populates the rating scheme according to the rating scheme entered on the Application Evaluation page for this evaluation code (for this person). You can add more than one rating scheme for an evaluator.

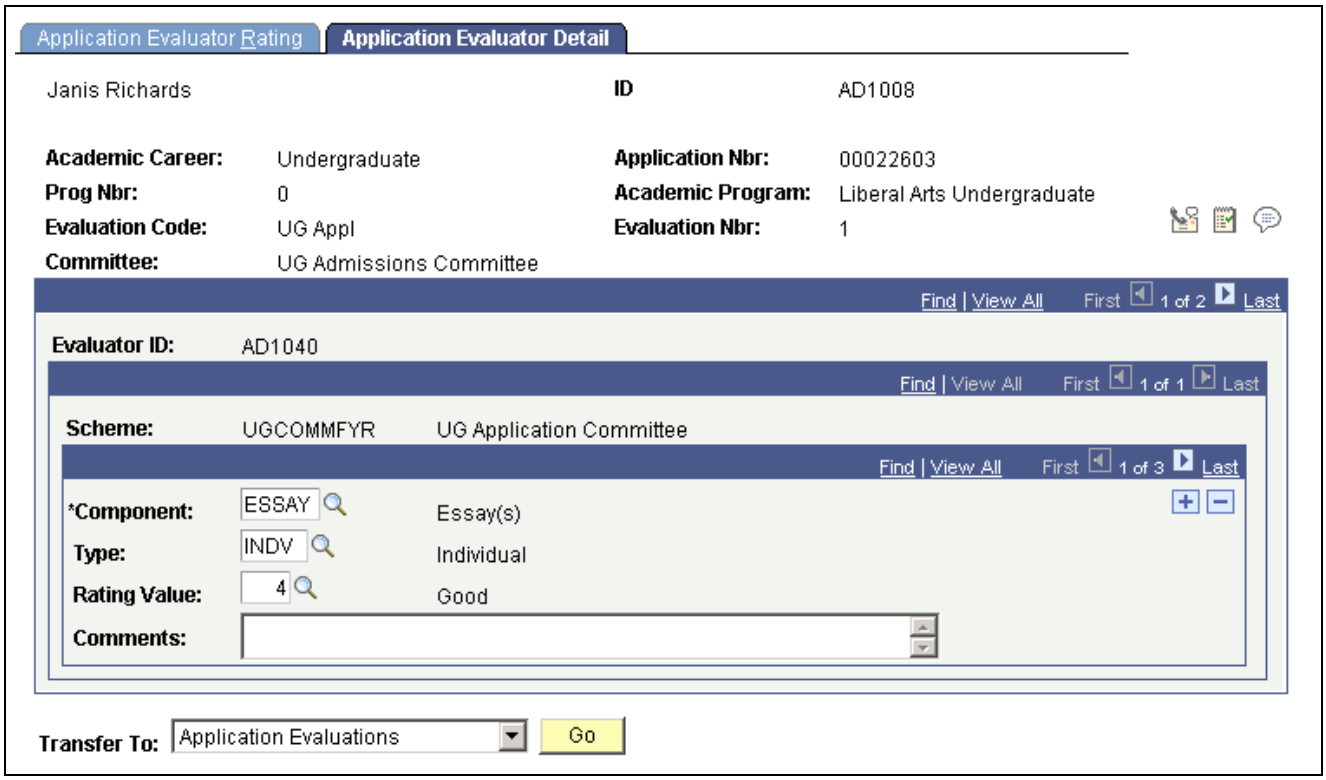
Evaluation Status Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.

Evaluation Date The default for the evaluation date is your system date.

Overall Rating The system automatically calculates the overall rating by averaging the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the Application Evaluator Detail page. You can override this calculation if desired. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings of Individual Rating Components

Access the Application Evaluator Detail page.



Application Evaluator Detail page

Component and **Type** The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types if desired.

Rating Value Select a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the Application Evaluator Rating page. You must enter ratings

on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

CHAPTER 21

Evaluating Applicants Using Automatic Processing

This chapter provides an overview of evaluating applicants using automatic processing and discusses how to:

- Assign evaluation codes to applications in batch.
- Link application materials to applications in batch.
- Calculate rating values through an automatic process.
- Automatically update application program evaluation statuses.

Understanding How to Evaluate Applicants Using Automatic Processing

PeopleSoft Recruiting and Admissions provides the following automatic processes to aid in evaluating applicants:

- Mass Change and the Assign Evaluation Codes process (ADEVALCD.SQR).

  Assigns evaluation codes to applications in batch. Evaluation codes contain default data required for evaluating applicants (such as the rating scheme, evaluation status, and so on).

- Extract data for Adm Appl Matl (extract data for admissions application materials) process (ADMTLEXT.SQR).

  Assigns application materials to applications in batch. Application materials are used to evaluate applications.

- Assign Adm Applicant Rating (assign admissions applicant rating) process (ADMTLRTG.SQR).

  Retrieves objective scores (such as test scores) and evaluates them based on rules that you define in your own SQCs. Then, the process populates rating values on the Overall Rating page in the Application Evaluation component. Rating values are used to evaluate applicants.

- Program Stack Update process (ADMTLPGS.SQR).

  Checks to see that all of the rating components have been entered, then sums all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values. Finally, updates the application evaluation status based on the rules in your SQCs.

- Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process (SFPBADEP).

  Calculates enrollment deposits in batch on applications on which you've run the Program Stack Update process.

- Activate Applications process (ADPCPPRC).

Matriculates applicants in batch who were evaluated using the Program Stack Update process.

Note. PeopleSoft delivers sample SQRs to help you with a variety of tasks. However, your institution can modify these SQRs to fit their specific needs. For this reason, your SQRs might be named differently, and they might behave slightly differently than described.

See Also

Chapter 20, "Evaluating Applicants," page 377

Assigning Evaluation Codes to Applications in Batch

Before you can run the application materials extract process or an evaluation calculation for a group of applications, you must assign them an evaluation code. Evaluation codes contain important default information and helps with selecting the appropriate group for extract and evaluation processing.

First you must select the applications that you want to assign the evaluation codes to. Use the Mass Change feature to do this. Then run the Assign Evaluation Codes process to assign the evaluation codes to the applications that the mass change process selected.

To access the Mass Change Definition component, select Student Admissions, Processing Applications, Mass Change, Mass Change Definition.

See *PeopleSoft Data Management*

To assign evaluation codes with mass change:

1. Select the appropriate mass change definition to define which applications need to be assigned which evaluation code.

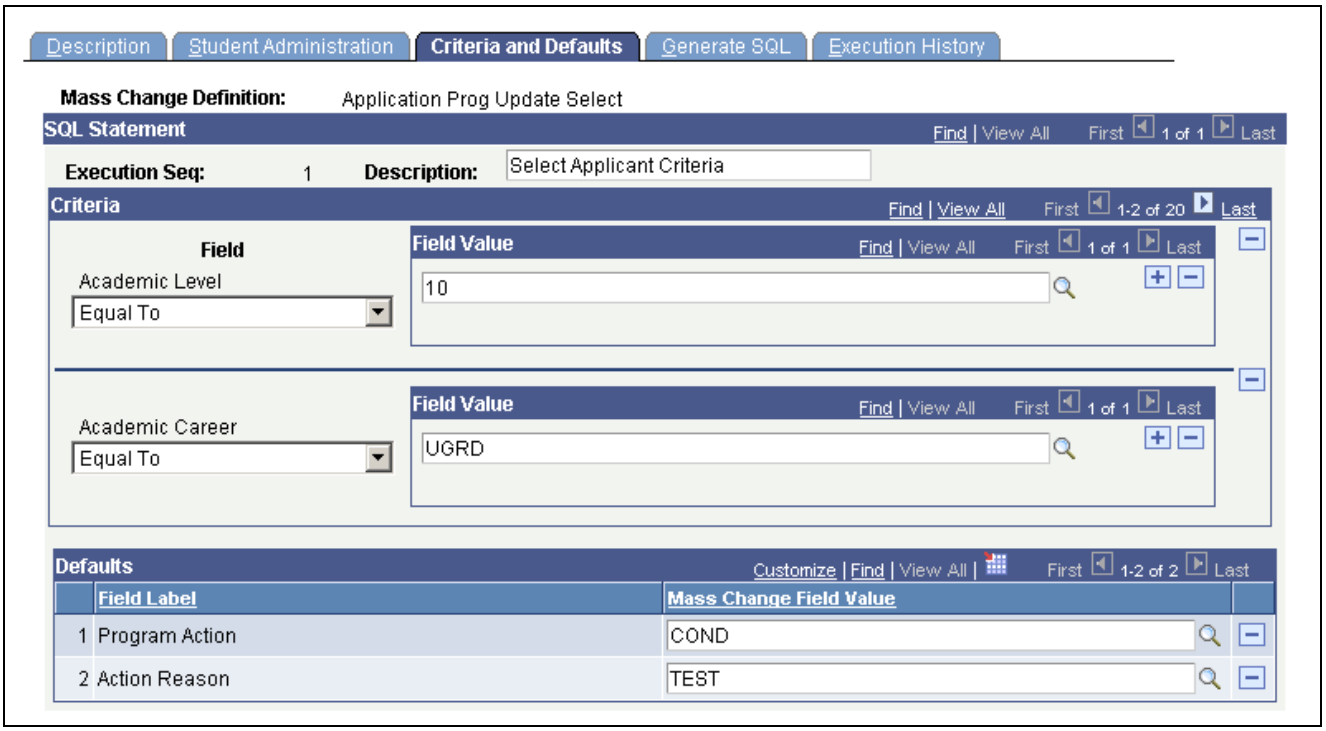
   Use the Mass Change Definition - Description page to enter the mass change definition that defines the criteria by which you select applications. The delivered mass change definition for assigning evaluation codes is *Evaluation Assignment Select.* However, your institution can define its own mass change definition for assigning evaluation codes, but use the delivered mass change definition as a template.

2. Enter criteria for determining which applications to assign the evaluation code, and enter the evaluation code you want assigned to those applications.

   Use the Criteria and Defaults page to enter criteria for determining which applications to assign the evaluation code, and to enter the evaluation code you want assigned to those applications.

   The first execution sequence of the SQL statement in the delivered mass change definition is *Delete Tmp5 Table*. This program clears the temporary table that stores the records of those applications selected the last time you ran this process.

   The second execution sequence of the SQL statement in the delivered mass change definition is *Select Applicant Criteria.* The following page shot shows an example of the criteria that can be used in the selection process.



Criteria and Defaults page

Use the Criteria group box to enter the criteria by which the mass change process will select applications to assign the evaluation code you select. In the delivered Evaluation Assignment Select mass change definition, there are 27 fields you can use to select applicants (such as academic level, academic career, program status, recruiter ID, and many others). In our example in the previous page shot, the applicant must have an academic level of *10* and must be an undergraduate. However, there could be many more fields selected as search criteria in subsequent rows.

Use the Defaults group box to select the evaluation code that you want the mass change process to assign to the applications that you selected. In the example in the previous page shot, the evaluation code the mass change process will assign is *UGAPPLFYR* (first year undergraduate applicants).

1. Generate the SQL for this mass change definition.

   Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition.

   Remember to click the Clear SQL button if an SQL statement already exists in the text box.

2. Set up a mass change group to define in what order you want the mass change definitions to run.

   Use the Mass Change Group component to set up mass change groups. To access the Mass Change Group component select Student Admissions, Processing Applications, Mass Change, Mass Change Group. Create a mass change group to group the steps that it takes to process the applications you selected. Create a group by entering related mass change definitions that you must run to complete a particular task (such as assigning evaluation codes), and the order in which they should be run.

   On the Mass Change Group page, select *SA* (student administration) in the PS Owner field.

   Next, select the mass change definitions. In the previous example, you would run the *Evaluation Assignment Select* mass change definition first. This definition selects all the records chosen by the SQL statement that you generated earlier. Second, you would run the *Evaluation Duplicate Check* mass change definition, which removes any applicants who matched your selection criteria, but were already assigned the evaluation code.

3. Process the mass change group to select the applications to be assigned the evaluation code.

   Use the Run Mass Change page to execute the mass change definitions in the mass change group. The mass change definitions in this group choose your final list of applications that should be assigned a code during the evaluation code assignment process. To access this page select Student Admissions, Processing Applications, Mass Change, Run Mass Change.

   On the Run Mass Change page, select the Execute Mass Change Group option. Then select the mass change group ID that you defined on the Mass Change Group page.

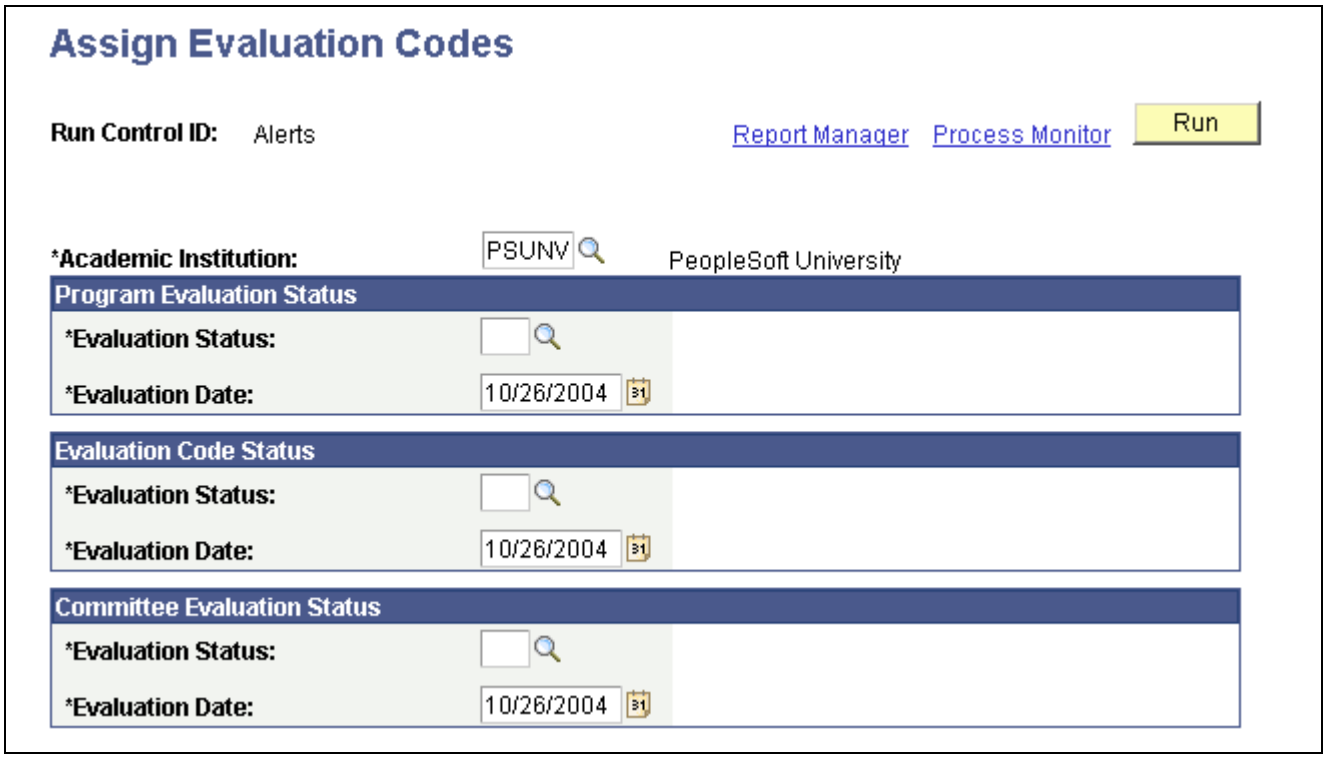
4. Run the Evaluation Code Assignment process (discussed in the following section).

Page Used to Assign Evaluation Codes to Applications in Batch

Page Name	Object Name	Navigation	Usage
Evaluation Code Assignment	RUNCTL_EVALCODE	Student Admissions, Processing Applications, Evaluations, Assign Evaluation Codes	Assign the evaluation code to the applications that you selected through the mass change process. **Note.** PeopleSoft delivers a sample SQR for assigning evaluation codes, ADEVALCD.SQR. Your institution can modify this SQR to fit its specific needs.

Running the Evaluation Code Assignment Process

Access the Evaluation Code Assignment page.



Assign Evaluation Codes page

Program Evaluation Status

Evaluation Status and **Evaluation Date** — Enter the evaluation status and date that you want entered on the Evaluation subpage of the Application Program Data page. Define evaluation statuses on the Evaluation Status Table page.

Evaluation Code Status

Evaluation Status and **Evaluation Date** — Enter the evaluation status and date that you want entered on the Application Evaluation page. Define evaluation statuses on the Evaluation Status Table page.

Committee Evaluation Status

Evaluation Status and **Evaluation Date** — Enter the evaluation status and date that you want entered on the Committee Rating and Evaluator Rating pages. Define evaluation statuses on the Evaluation Status Table page.

Click the Run button to run the Assign Evaluation Codes process at user-defined intervals.

Linking Application Materials to Applications in Batch

This section discusses how to link application materials to applications in batch.

Page Used to Link Application Materials to Applications in Batch

Page Name	Object Name	Navigation	Usage
Application Materials Extract	RUNCTL_APPEVAL1	Student Admissions, Processing Applications, Evaluations, Application Materials Extract	Assign application materials to applications in batch. Application materials are used to evaluate applicants. **Note.** PeopleSoft delivers a sample SQR for extracting application materials, ADMTLEXT. Your institution can add to or edit the SQCs for this SQR.

Linking Application Materials to Applications in Batch

In order for an application to be considered during the application materials extract process, the application must have an evaluation code assigned on the Application Evaluation page, and the Automatic Update Process check box must be selected on the Overall Rating page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, which must have material extract SQCs defined for it. The Application Materials Extract process uses those SQCs to assign the appropriate materials to the selected applications. Define rating schemes and their material extracts on the Rating Scheme Table page.

Evaluation Code Select an evaluation code. The process only extracts application materials for applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Admit Term Select an admit term. The process only extracts application materials for applications with the admit term that you select. Define admit terms on the Term Values Table page.

Evaluation Status Select an evaluation status. The process only extracts application materials for applications with the evaluation status that you select. The process looks at the Evaluation Status field on the Application Program Data page.

Institution Select an Academic Institution. The process only extracts application materials for applications for the institution you select.

Click the Run button to run the Extract data for Adm Appl Matl (extract data for admissions application materials) process at user-defined intervals.

To view the results of this extract process, use the Application Materials Summary pages under Student Admissions, Applicant Summaries.

Calculating Rating Values through an Automatic Process

The section discusses how to calculate rating values through an automatic process.

Page Used to Calculate Rating Values through an Automatic Process

Page Name	Object Name	Navigation	Usage
Evaluation Calculation	RUNCTL_APPEVAL2	Student Admissions, Processing Applications, Evaluations, Evaluation Calculation	Run the evaluation calculation.

Calculating Rating Values Through an Automatic Process

Access the Evaluation Calculation page.

Evaluation Calculation page

The application must first be assigned an evaluation code on the Application Evaluation page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, and the rating scheme must have rating components assigned to it. Each rating component in the rating scheme has a defined sequence and formula ID. The formula ID defines which SQC should be run for the rating component. The evaluation calculation looks to those components to come up with rating values that will be inserted on the Overall Rating page for the application. Application materials must have been assigned manually or automatically.

The Evaluation Calculation process looks for applications that meet the criteria you enter here which have never been calculated or which were previously calculated, but have had materials linked to the application after the last calculation was run. If new materials have been added since the last calculation, the system selects the Recalculate Evaluation check box on the Application Evaluation page.

When the Evaluation Calculation process finds an application that meets its criteria, it retrieves the values that your SQCs tell it to retrieve, evaluates the values based on the rules in your SQC, and populates the result on the Overall Rating page in the Application Evaluation component. For example, suppose you determine that an SAT score of over 1450 is worth a rating value of 10. Suppose further that you run the process and it retrieves an SAT score of 1462. The process would evaluate based on your rules and populate the rating value (10) in the Rating Value field for the test score component.

Note. PeopleSoft delivers a sample SQR for evaluating applications, ADMTLRTG. Your institution must define its own SQCs for this SQR, which define the rules by which applications should be evaluated.

Evaluation Code Select an evaluation code. The process only evaluates applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.

Admit Term Select an admit term. The process only evaluates applications that have the admit term you select. Define admit terms on the Term Values Table page.

Institution Select an institution. The process only evaluates applications for this institution.

From The process only evaluates applications that have the evaluation status you select. This is the evaluation status listed on the Application Evaluation page.

To	Select the evaluation status that you want the process to *add* to the application evaluations.

Click the Run button to run the Assign Adm Applicant Rating (assign admissions applicant rating) process at user-defined intervals.

Automatically Updating Application Program Evaluation Statuses

Use the Application Status Update process to automatically update the program evaluation status of multiple applications.

This process looks to the parameters you define to choose the applications to be considered for the status update. The program looks to the Overall Rating page to verify that all rating components designated as final value have been evaluated. The program then determines if any of these applications have a future dated row on the Application Program Data page. Any records with a future dated row are *not* included in this process.

The next step in the process is to sum all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values.

For each application evaluated, the Application Program Data page is updated as follows:

- The process updates the program evaluation status.
- The process inserts a new program data row with an effective date equal to your system date, or, if the most recent row has the same effective date as the current date, the sequence number is incremented.

  The new row contains the same data as the previous row, with the following exceptions: program action, action date and program status, which the process updates. The action reason is also updated if you have defined for it to do so in your SQC.

The values the process inserts are determined by the rules of the SQCs that your institution defines.

When you update application program data via the Application Status Update process, you’re unable to manually calculate enrollment deposits or activate applicants as students. Therefore, you must calculate enrollment deposits and activate applicants as students via two COBOL processes: the Calculate Deposits process and the Activating Applications process.

This section discusses how to:

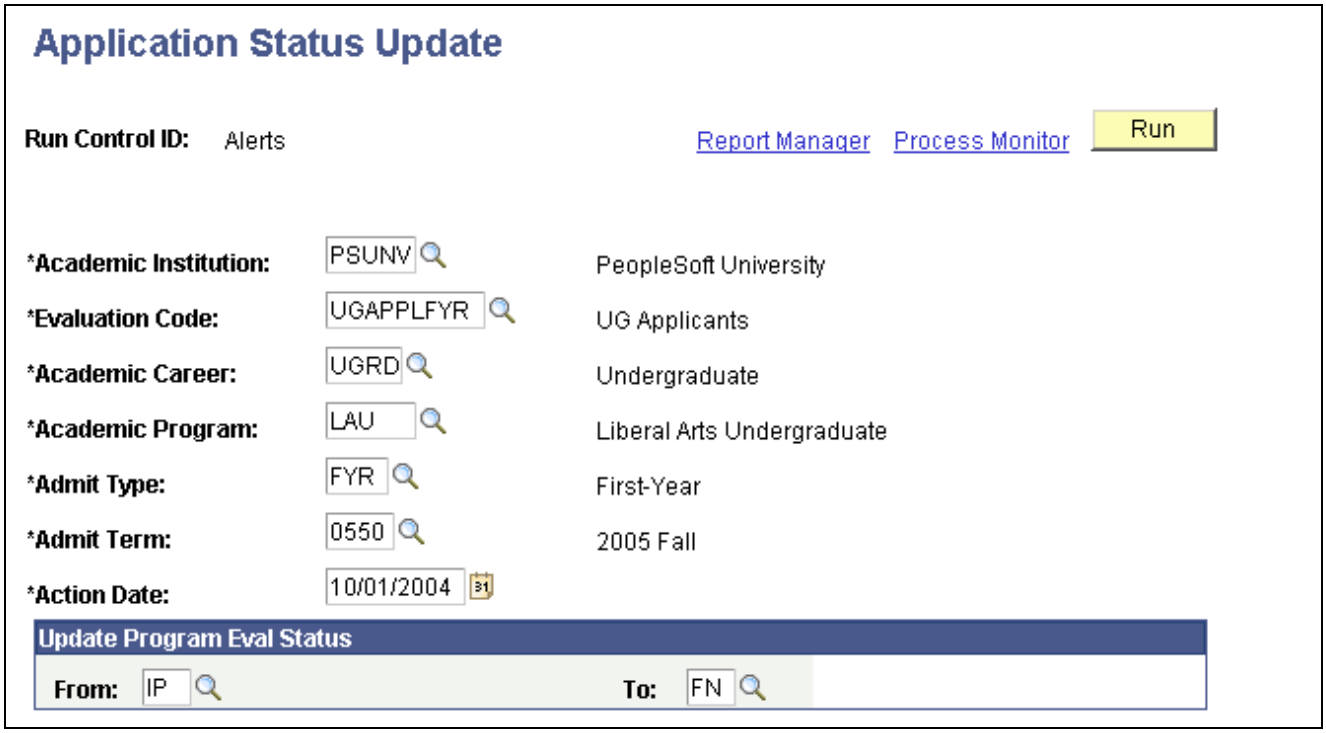
- Updating application program evaluation status using the Application Status Update process.
- Calculating enrollment deposits using the Deposit Fees Calc (Batch) process.
- Activating applicants as students using the Activate Applications process.

Pages Used to Automatically Update Application Program Evaluation Statuses

Page Name	Object Name	Navigation	Usage
Application Status Update	RUNCTL_EVALSTATUS	Student Admissions, Processing Applications, Update Applications, Application Status Update	Perform a background process to update the program evaluation status and program actions of applications that have been evaluated. **Note.** PeopleSoft delivers a sample SQR, ADMTLPGS.SQR. Your institution can add to or edit the SQCs for this SQR.
Calculate Deposits	RUNCTL_SFPBADEP	Student Admissions, Application Fees and Deposits, App Deposit Fees Process	Calculate enrollment deposits for applicants who were admitted via the Application Status Update process. You must calculate an enrollment deposit before activating the applicant as a student if you have a deposit fee code assigned to your application center (on the Application Center Table page). You must first admit applicants through the Program Stack Update process.
Activate Application	RUNCTL_AD_SR	Student Admissions, Processing Applications, Update Applications, Activate Applicants	Activate applicants as students. This process inserts a program action of Matriculate (MATR) on the Application Program Data page and creates the student program and plan records. Use the Activate Applications process if you admitted an applicant through the Program Stack Update process, and therefore could not manually matriculate the applicant. If your institution requires an enrollment deposit prior to matriculation, you must calculate a deposit prior to running this process.

Updating Application Program Evaluation Status Using the Program Stack Update Process

Access the Application Status Update page.



Application Status Update page

Evaluation Code Select an evaluation code. The process only processes the applications that have the evaluation code that you select. Define evaluation codes on the Evaluation Table page.

Academic Career Select an academic career. The process only processes the applications that have the academic career that you select. This is the academic career to which that the applicant is applying.

Academic Program Select an academic program. The process only processes the applications that have the academic program that you select.

Admit Type Select an admit type. The process only processes applications that have the admit type that you select. Define admit types on the Admit Type Table.

Admit Term Select an admit term. The process only processes the applications that have the admit term that you select. Define admit terms on the Term Values Table page.

Action Date The default for the action date is your system date. Edit this date to reflect the date you want to appear as the action date on the Application Program Data page.

From The process only process applications that have the evaluation status you select.

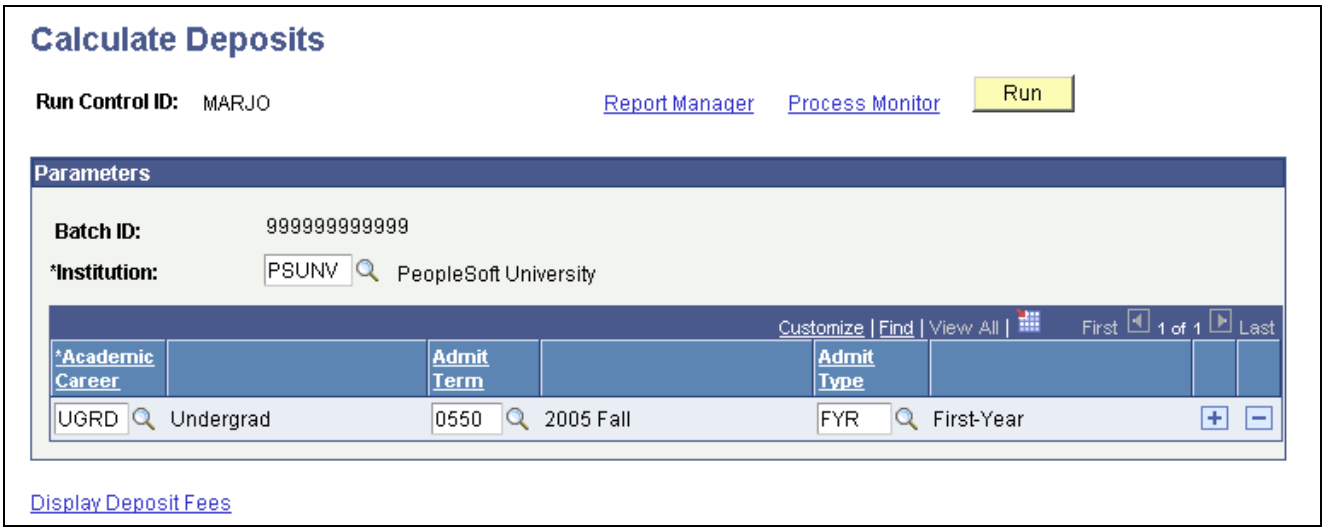
To Select the program evaluation status that you want the process to *add* to the applications on the Application Program Data page.

Click the Run button to run the Program Stack Update process at user-defined intervals.

To view the results of this application program evaluation status update process, you can use the Applicant Progression page, or you can go to an individual's Application Program Data page in the Application Maintenance component.

Calculating Enrollment Deposits Using the Deposit Fees Calc (Batch) Process

Access the Calculate Deposits page.



Calculate Deposits page

Academic Career Select an academic career. The process only calculates enrollment deposits for applications that have the academic career that you select.

Admit Term Select an admit term. The process only calculates enrollment deposits for applications that have the admit term that you select. Define admit terms on the Term Values Table page.

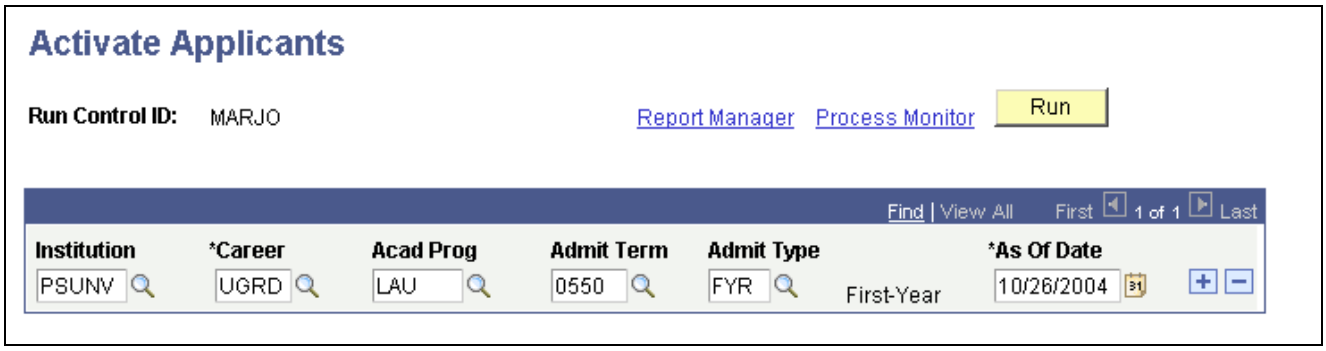
Admit Type Select an admit type. The process only calculates enrollment deposits for applications that have the admit type that you select. Define admit types on the Admit Type Table page.

You can add additional rows as needed for selecting additional careers, admit terms etc. to calculate deposits for multiple groups of applicants. Click the Run button to run the Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process at user-defined intervals.

To view the results of the Deposit Fees Calc (Batch) process for an applicant, use the Customer Accounts page in the PeopleSoft Student Financials application.

Activating Applicants as Students Using the Activate Applications Process

Access the Activate Application page.



Activate Applicants page

Career Select an academic career. The process only matriculates applicants who have the academic career that you select.

Acad Program (academic program) Select an academic program. The process only matriculates applicants who have the academic program that you select.

Admit Term Select an admit term. The process only matriculates applicants who have the admit term that you select. Define admit terms on the Term Values Table page.

Admit Type Select an admit type. The process only matriculates applicants who have the admit type that you select. Define admit types on the Admit Type Table page.

As of Date The default for the as of date is your system date. This is the date you ran this process.

Add additional rows as needed to define additional selection criteria. Click the Run button to run the Activate Applications process at user-defined intervals.

CHAPTER 22

Viewing Application Evaluation Summaries and Progression

This chapter discusses how to:

- View application evaluation summaries.
- View a summary of an applicant's progression.

Viewing Application Evaluation Summaries

Use the Application Evaluation Summary pages to view the status of application evaluations.

This section discusses how to:

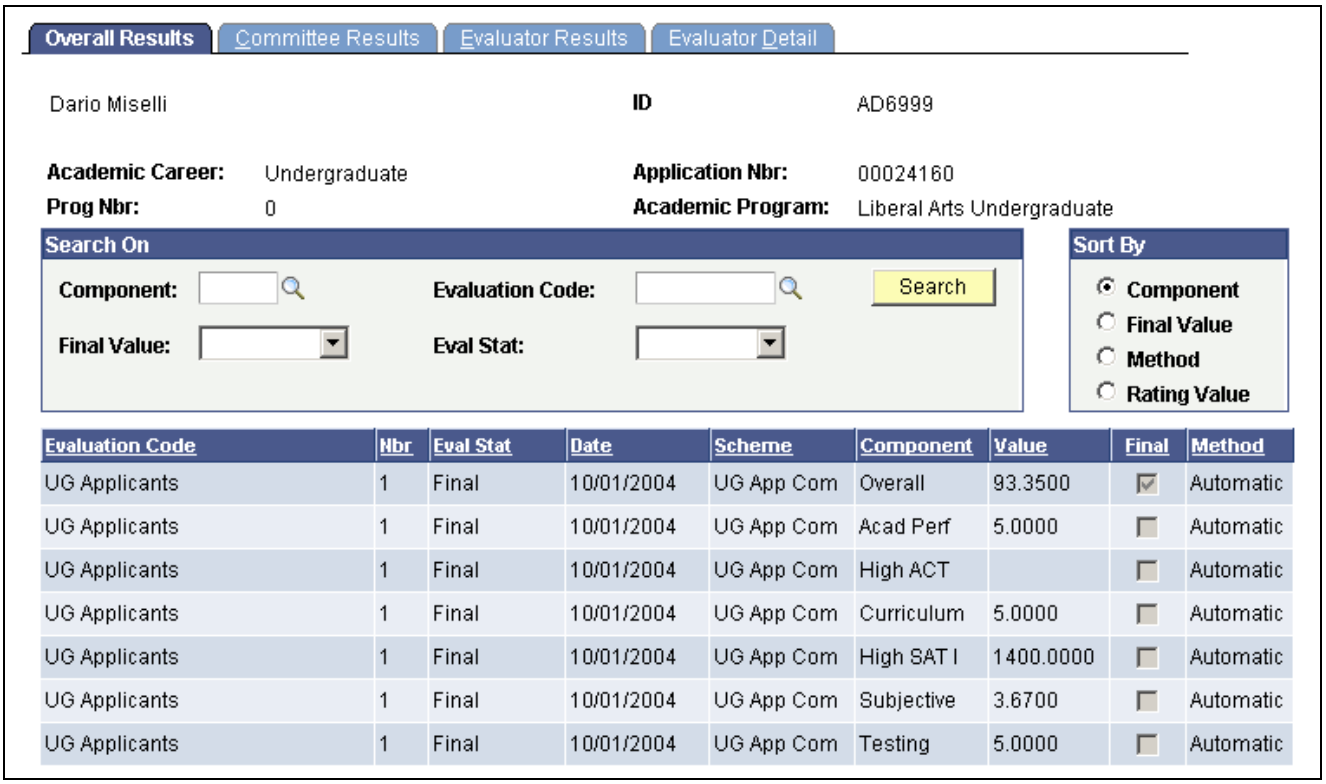
- View overall results of an application evaluation.
- View committee results of an application evaluation.
- View evaluator results of an application evaluation.
- View evaluator detail summary information of an application evaluation.

Pages Used to View Application Evaluation Summaries

Page Name	Object Name	Navigation	Usage
Overall Results	ADM_EVAL_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary	Look up overall results of an application evaluation for an applicant. You must first complete the application evaluation for this person.
Committee Results	ADM_EVAL_COMM_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Committee Results	Look up results of committee application evaluations for an applicant.
Evaluator Results	ADM_EVALUATOR_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Results	Look up results of evaluators' evaluations of an application.
Evaluator Detail	ADM_EVAL_DTL_SUM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Detail	Look up results of the details of evaluators' evaluations of an application. You must first complete the application evaluation for this person.

Viewing Overall Results of an Application Evaluation

Access the Overall Results page.



Evaluation Code	Nbr	Eval Stat	Date	Scheme	Component	Value	Final	Method
UG Applicants	1	Final	10/01/2004	UG App Com	Overall	93.3500	☑	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Acad Perf	5.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High ACT		☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Curriculum	5.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High SAT I	1400.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Subjective	3.6700	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Testing	5.0000	☐	Automatic

Overall Results page

Component Select a rating component If you want to view summary information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.

Final Value Select *Yes* if you want to view summary information for final value components only. Select *No* if you do not want to view only final value components.

Evaluation Code Select an evaluation code if you want to view summary information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

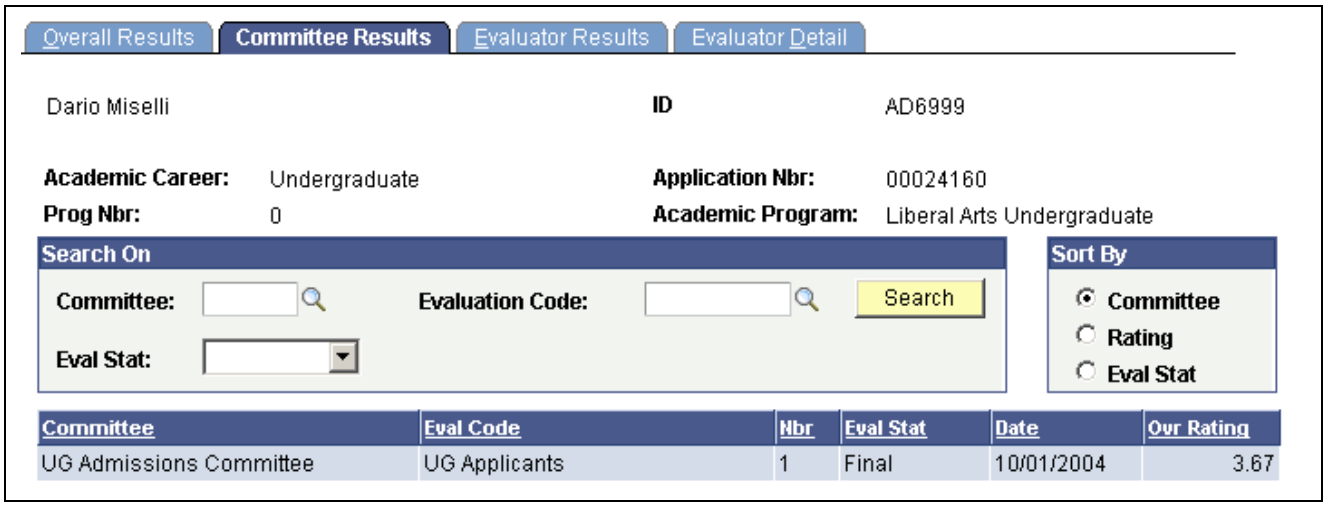
Eval Stat (evaluation status) Select an evaluation status if you want to view summary information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Application Evaluation page.

Sort By Select whether you want to view the results by Component, Final Value, Evaluation Method, or Rating Value.

Search Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Committee Results of an Application Evaluation

Access the Committee Results page.



Committee Results page

Committee Select an evaluation committee If you want to view committee information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code Select an evaluation code if you want to view committee information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Eval Stat (evaluation status) Select an evaluation status if you want to view committee information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Committee Evaluation page.

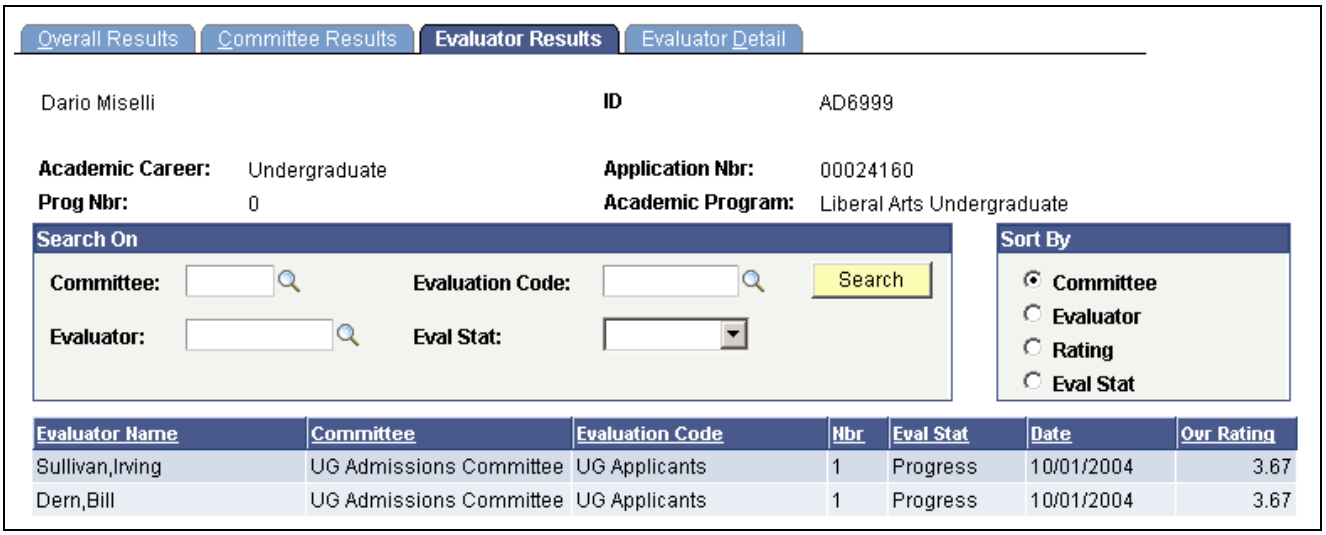
Sort By Select whether you want to view the results by *Committee, Rating,* or *Eval Stat* (evaluation status).

Committee, Rating, or **Evaluation Status** Select whether you want to view the results of your summary information by committee, rating, or evaluation status.

Search Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Results of an Application Evaluation

Access the Evaluator Results page.



Evaluator Results page

Committee Select an evaluation committee If you want to view evaluator result information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code Select an evaluation code if you want to view evaluator result information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Evaluator Select an evaluator if you want to view evaluator result information for a specific evaluator.

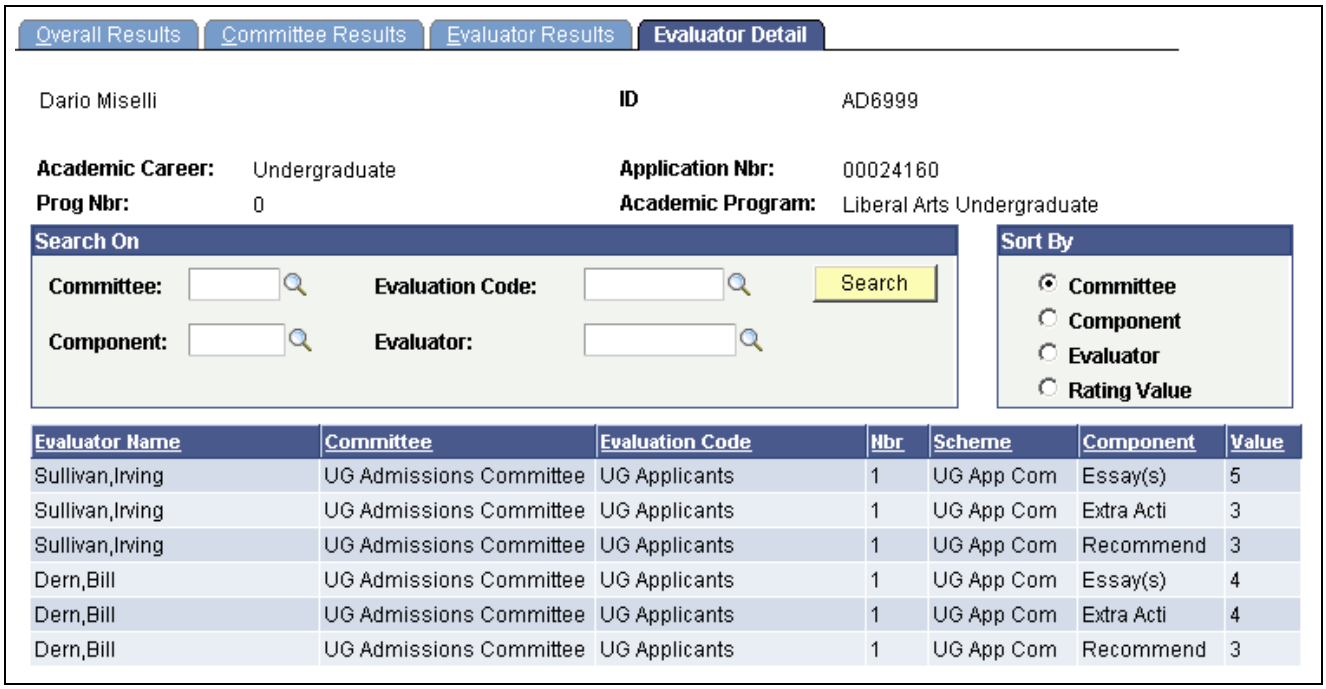
Eval Stat (evaluation status) Select an evaluation status if you want to view evaluator result information by this criterion. When you click the Search button the system retrieves evaluator result information for those evaluations that have matching evaluation statuses on the Evaluator Rating page.

Sort By Select whether you want to view the results by *Committee, Rating,* or *Eval Stat* (evaluation status).

Search Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Detail Summary Information for an Application Evaluation

Access the Evaluator Detail page.



Evaluator Name	Committee	Evaluation Code	Nbr	Scheme	Component	Value
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	5
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	3
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	4
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3

Evaluator Detail page

Committee Select an evaluation committee If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.

Evaluation Code Select an evaluation code if you want to view evaluator detail information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Component Select a rating component If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.

Eval Stat (evaluation status) Select an evaluation status if you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves evaluator detail information for those evaluations that have matching evaluation statuses on the Application Evaluator Detail page.

Sort By Select whether you want to view the results by *Committee, Component, Evaluator,* or *Rating Value.*

Search Click this button to bring up the evaluator detail information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing a Summary of an Applicant's Progression

This section discusses how to view a summary of an applicant's progression.

Page Used to View a Summary of an Applicant's Progression

Page Name	Object Name	Navigation	Usage
Applicant Progression	APPL_PROGRESS_SUMM	Student Admissions, Applicant Summaries, Applicant Progression	Look up a summary of an applicant's progression through the recruiting and admissions business process. Summary data (such as status and program action) can be viewed for the person as a prospect, applicant, and student. Individuals must have an application in your database for you to be able to view their progression.

CHAPTER 23

(NLD) Creating Educational Agreements

This chapter lists common elements and discusses how to:

- Maintain coursework and agreement information.
- Maintain financial contribution information.
- Review and update educational agreements.
- Determine a selection method for an institution.
- Create OWO contracts.
- Print educational contract agreements.

Common Elements Used in This Section

Appendix Document The reference code of the appendix document.

Maintaining Coursework and Agreement Information

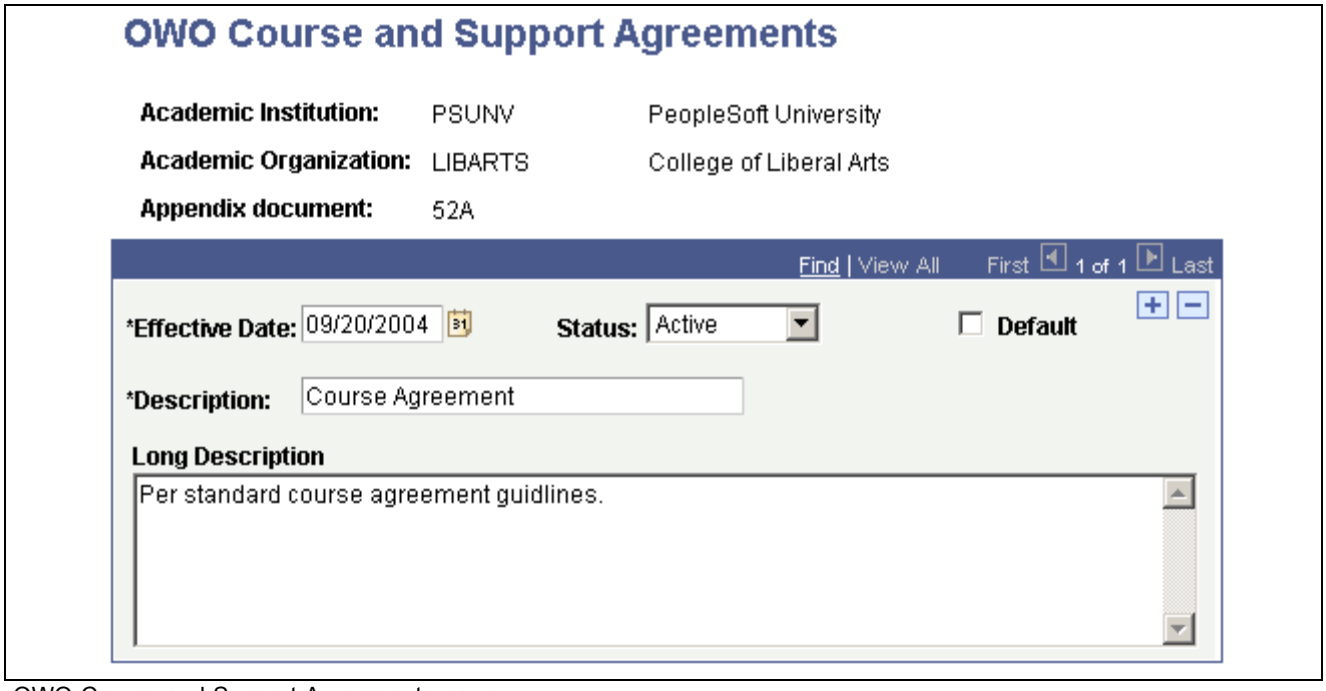
This section discusses how to maintain coursework and agreement information.

Page Used to Maintain Coursework and Agreement Information

Page Name	Object Name	Navigation	Usage
OWO Course and Support Agreements	SAD_AOHS_NLD	Student Admissions, Educational Contracts NLD, Course and Support Agreements	This page is used to describe the contents of an appendix (with course and support issues) that is printed on the OWO contract. During the creation process of the OWO (SQR process), the appendix that is flagged as the default appendix is added to the OWO contract appendix table. Before printing, this appendix can be replaced for an individual student by another non default appendix from the OWO course and support appendix table. If required, the text can then be modified to the needs for this individual student. During the print process (Crystal report), in the OWO Course and support appendix section of the report, the text from the OWO contract appendix table is then inserted.

Maintaining Coursework and Agreement Information

Access the OWO Course and Support Agreements page.



OWO Course and Support Agreements page

Default Select this option to make the appended document the default agreement.

Long Description This region contains the default course and support agreements which can be setup according to the academic organization. The text is effective-dated. Individually this text can be replaced by other agreements in the AOHS appendix table.

Maintaining Financial Contribution Information

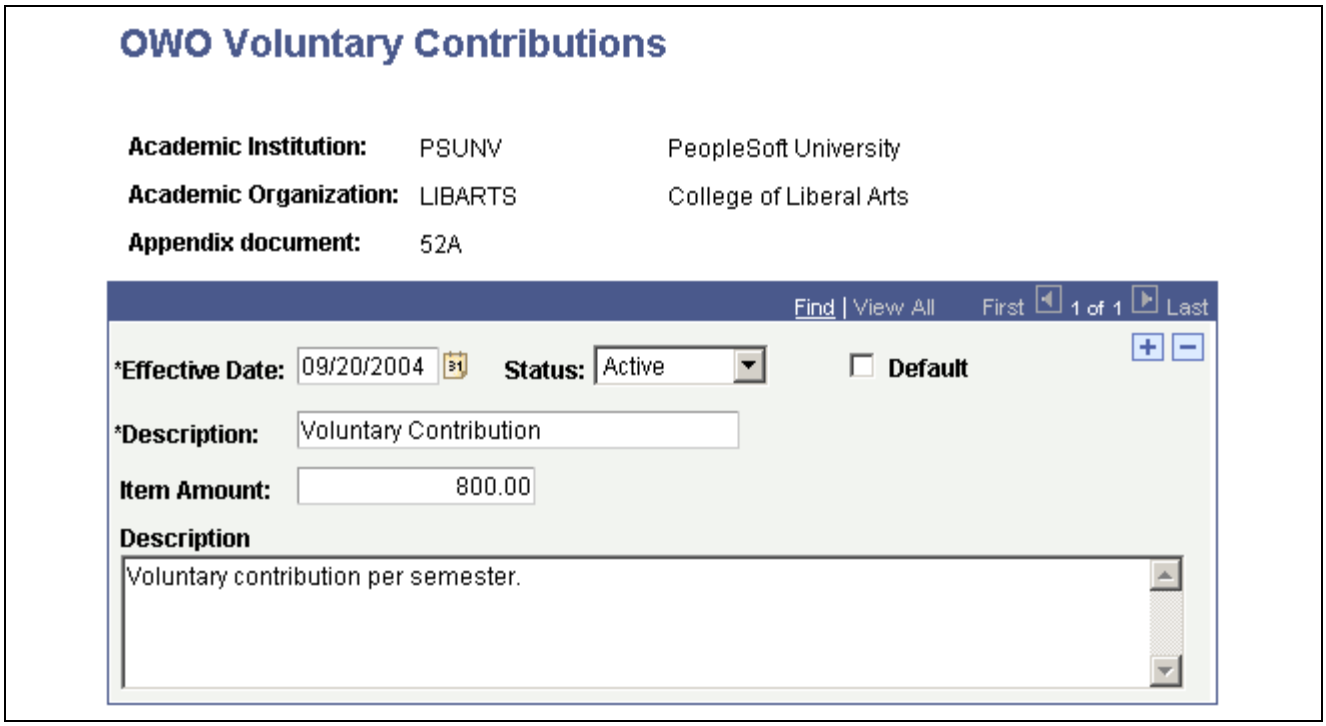
This section discusses how to maintain financial contribution information.

Page Used to Maintain Financial Contribution Information

Page Name	Object Name	Navigation	Usage
OWO Voluntary Contributions	SAD_AVB_NLD	Student Admissions, Educational Contracts NLD, Voluntary Contributions	Maintain information regarding a student's course work requirement and institutional support agreement. During the print process the voluntary contributions text will be inserted on the OWO report in the Voluntary contributions appendix section.

Maintaining Financial Contribution Information

Access the OWO Voluntary Contributions page.



OWO Voluntary Contribution page

Item Amount The entered amount is placed on a fixed position in the voluntary contribution appendix during the print process. The currency is placed by the Crystal (it can be any currency). The voluntary contribution appendix usually contains a text (that explains for example the reason for the voluntary contribution) and the agreed amount. This amount is derived from this field.

Description A short description of the appendix text. It is only informational. This can be used to find a specific appendix more easily in search records/prompts.

Reviewing and Updating Educational Agreements

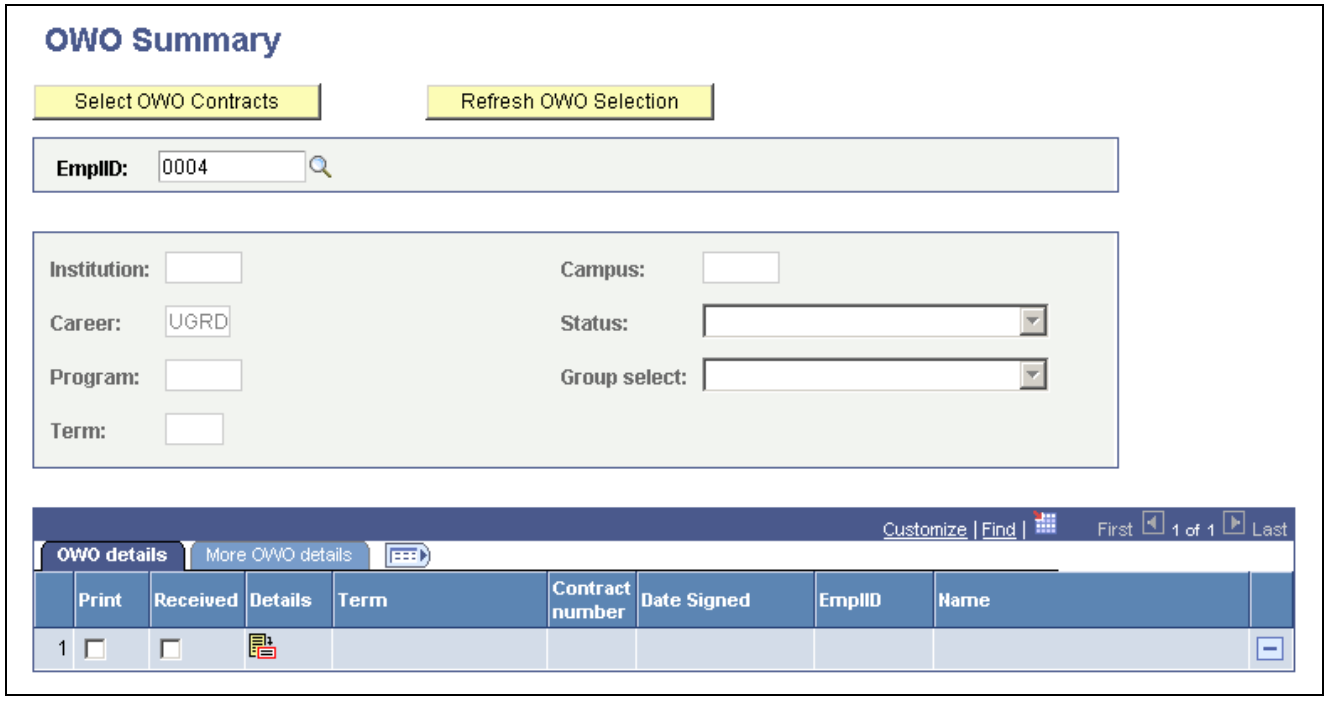
This section discusses how to review and update educational agreements.

Pages Used to Review and Update Educational Agreements

Page Name	Object Name	Navigation	Usage
OWO Summary	SAD_OWO_CTRSUM_NLD	Student Admissions, Educational Contracts NLD, OWO Summary	Review and update educational contract agreements for individual students. Updating contract information is only possible when the OWO is not printed. After printing the OWO, only the print flag, return flag / date and status (active / inactive) can be changed.
OWO Contract Summary	SAD_OWO_CNTRCT_SEC	Click the Detail button on the OWO Summary page to view the OWO Contract Summary page.	Review details of the OWO contract.
Other Text Appendixes	SAD_OWO_APP4_SEC	Click the Detail button on the OWO Contract Summary page to view the Other Text Appendixes page.	Add general text appendixes.

Reviewing and Updating Educational Contract Agreements

Access the OWO Summary page.



OWO Summary page

Select OWO Contracts After you click this button, the entered values in the selection area are used to select the OWO contracts from the contract table. When the employee ID

	is entered, the selection is based only for this employee. If no employee is selected, the other selection fields are used.
Refresh OWO Selection	Click this button to initiate the selection fields.
EmplID	Select the employee identification code for the student.
Institution	Select the academic institution attended by the student.
Acad Prog (academic program)	Select the academic program of the student.
Campus	Select the campus with which the student is affiliated.
Career	Select the career with which the student is affiliated.
Term	Select the admit term.
Status	Select Active or Inactive.
Group Select	If a group selection is required, define the source of the group (when one is selected, then this field becomes visible) and, enter the group name. The source of the group can be the Class table, Student Group table or Student Block Header table.

OWO Details

Print	Select if you want to print the OWO to start automatically after the generation process.
Received	When an OWO contract has been printed, this flag can be checked after all signatures needed for the contract are received. On the detail page for this contract, the return date will be set to the system date. This date can be changed by the user.
Details	Click the detail button to view additional data on the OWO contract. When not printed yet, some data can be maintained by the user. After printing the contract, only status and return date for the signatures can be changed.
Contract Number	The contract number which is automatically assigned to this contract by the OWO creation process.
Date Signed	This is the date on which the contract has been created.
EmplID	The student ID for which the OWO contract is created.

More OWO details

Career	The career with which the student is affiliated.
Program	The program with which the student is affiliated.
Student Career Nbr (student career number)	The student career number with which the student is affiliated.
Campus	The campus with which the student is affiliated.
User ID	The ID of the user who is responsible for creating the OWO contract.

Reviewing Details of the OWO Contract

Access the OWO contract summary subpage.

Status	The status can be changed from Active to Inactive. The Reason field will appear.
Start Date	The matriculation date of the student.
End Date	The matriculation date of the student plus the duration.
Duration (Hours)	The total duration of the OWO agreement in hours.
Old contract nbr (old contact number)	If the OWO contract replaces another OWO contract, the old contract number can be maintained here.
Complete education	If this option is not selected, then all the plans linked to the student will display.
Agreements AOHS (agreements appendix educational help structure)	If this option is not selected, then you are able to link to another appendix. The description also becomes available for text entries related to the student. Only appendixes that are not the default appendix will appear in the available options.
Agreements AVB (agreements voluntary contributions)	If this option is not selected, then you are able to link to another voluntary financial contribution appendix. Enter the amount and description for the student. Only appendixes that are not the default appendix will appear in the available options.

Note. After the contract is printed no additional data can be entered. If you need to correct data, then the contract must be set to inactive, a reason entered, and then a new contract must be generated. You may reprint the contract.

Adding General Text Appendixes

Access the Other text appendixes page.

Enter additional text which can be added to the OWO contract. The information can be used for institutions that need to add extra data to the OWO contract. Crystal can be customized to put this text on any place on the OWO contract.

Determining a Selection Method for an Institution

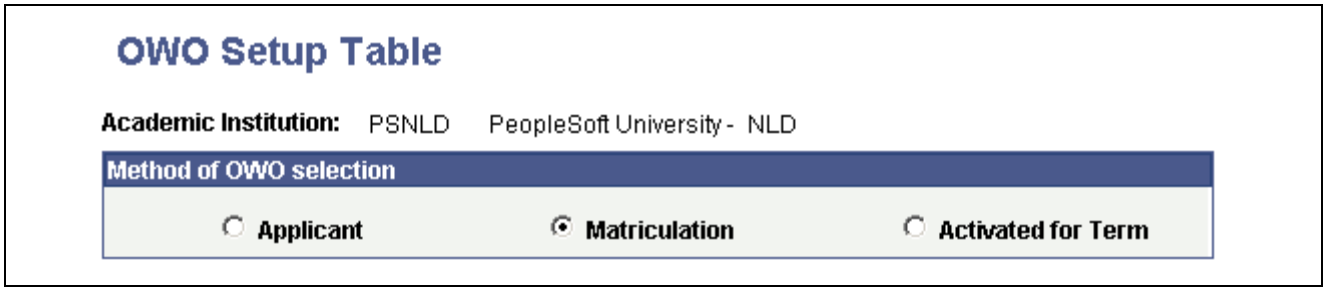
This section discusses how to determine a selection method for an institution.

Page Used to Determine a Selection Method for an Institution

Page Name	Object Name	Navigation	Usage
OWO Setup Table	SAD_OWO_INS_NLD	Student Admissions, Educational Contracts NLD, OWO Setup	Determine selection method for an institution.

Determining a Selection Method for an Institution

Access the OWO Setup Table page.



OWO Setup Table page

Use this page to control the way the OWO creation process should select the students, for which a contract is created. Choose one of the three options.

Applicant Only students for whom at least an application entry has been made can be selected during the OWO contract creation process.

Matriculation Matriculation of a student enrollment is the basis for OWO creation. Only students with a matriculation record can be selected.

Activated for Term Students need to be activated for a specific term first before they can be selected for the OWO creation process.

Creating OWO Contracts

This section discusses how to create OWO contracts.

Page Used to Create OWO Contracts

Page Name	Object Name	Navigation	Usage
Create OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions, Educational Contracts NLD, Create OWO Contracts	Generate educational contract agreements for groups of students or for individuals.

Creating OWO Contracts

Access the Create OWO Contracts page.

Create OWO Contracts page

The actual process that generates the OWO is a batch process.

Institution Select the institution for which you want to create the OWO.

Academic Career Select the career for which you want to create the OWO.

Selection Criteria Select this option if you want to create a contract for just one student. The Student ID and Career Nbr fields display.

Student ID Select the student ID of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.

Career Nbr (career number) Select the career number of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.

Academic Program Select the program for which you want to create the OWO.

Term Select the admit term for which you want to create the OWO.

Campus Select the campus for which you want to create the OWO.

Group selection If a group selection is required, define the source of the group and (when one is selected this field becomes visible), enter the group name. The source of the group can be the Class table, Student group table or Student block header table.

Group Select the group, block, or class section the student is in.

Address Type Select the address type that must be used for the student's address on the OWO.

Type of Name Select the name type that must be used for the student's name on the OWO.

Replace contracts Use to set the old contract to inactive, allowing for a new OWO contract to be created.

Current Effective Date Visible when the replace contracts flag is set. Only contracts with an end date that is earlier than the entered current effective date are part of the selection.

Start Date When a start date is entered, it will be put on the OWO contract as start date and the end date must be filled. When not filled, the start date is determined by the OWO creation process.

End Date End date must be entered if a start date is given. This date will be recorded on the OWO contract as the end date during the OWO creation process. If it is not entered, the creation process will automatically calculate the end date of the contract.

Printing OWO Contracts

This section discusses how to print OWO contracts.

Page Used to Print OWO Contracts

Page Name	Object Name	Navigation	Usage
Print OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions, Educational Contracts NLD, Print OWO Contracts	Print educational contract agreements for groups of students or for an individual.

Printing OWO Contracts

Access the Print OWO Contracts page.

Print OWO Contracts

If you want to print a contract for just one student, then select the Selection Criteria option. The EmplID and Career Nbr fields appear on the page.

See Chapter 23, "(NLD) Creating Educational Agreements," Creating OWO Contracts, page 428.

CHAPTER 24

Calculating Admissions Averages

This chapter provides an overview of admissions averages calculation, lists prerequisites, and discusses how to:

- Set up rules for the Admissions Averages SQC.
- Run the Application Materials Extract process.
- Evaluate applicants based on admissions averages.
- Run the Application Status Update process.
- Update admissions averages for financial aid and student records.

Understanding Admissions Averages Calculation

When you evaluate an applicant for admission to your organization, you can evaluate that applicant by the grade point average he or she earned in a specific set of classes. For example, an institution with a nursing program can evaluate applicants based on the grade point averages applicants earned in nursing prerequisites.

You can calculate the grade point average, evaluate the applicant based on that grade point average—an SQC defined by your institution determines the status of the application—and then update the applicant's application status.

To evaluate applicants based on admissions averages:

1. Set up the rules for the delivered admissions averages SQC (ADEVLAVG.sqc).
2. Assign the admissions evaluation code to the applicant and run the Materials Extract process (ADMTLEXT.sqr).
3. Run the Evaluating Applicants process (ADMTLRTG.sqr) to calculate the average.
4. Update the application status (ADMTLPGS.sqr).
5. You can also update financial aid and student records and generate an admissions average report, if desired.

Prerequisites

To calculate admissions averages, you use rating components, rating schemes, and evaluation codes. You set up one rating component for averages (AVDAVG), but you can set up many rating schemes that use the averages rating component. You can name your rating schemes whatever you like, but you must link the average rating component to each scheme that calculates admissions averages. For example, suppose that you calculate averages for your nursing program using the rating scheme UAVGNUR, for your computer engineering program using the rating scheme UAVGCEN, and for your honors English program using the rating scheme UAVGHEN. You would need to assign each of these rating schemes the ACDACG rating component.

You enter an SQC on the rating scheme, and you link the rating scheme to the evaluation code. You enter this code when you run the Evaluation Calculation process (ADMTLRTG.sqr) to calculate the averages. The evaluation code is linked to the rating scheme, which tells the process to execute the SQC.

Steps to take before you calculate admissions averages:

- Define an admissions averages rating component.

  Use the Rating Comp Def Table (rating component definition table) page to define an admission average rating component. Each rating scheme can have many rating components. For example, you can evaluate applicants based on an interview, SAT/ACT scores, overall GPA, and a grade average of a group of prerequisites. Each of these parameters would be defined as a rating component. You can also define a rating component for an overall score that the system uses to determine the application status. However, you need a rating component set up specifically for averages because the admissions averages SQC has to be associated with a specific rating component to calculate the desired averages.

  Important! When you enter the Rating Comp Def Table page for the first time, the system asks you to enter an institution and a rating component. Enter ADAVG in the Rating Component field.

- Define an admissions averages rating scheme.

  Use the Rating Scheme Table page to define the admissions average rating scheme that the system uses in the admissions evaluation process. You can name the rating scheme whatever you like, and you can define many rating schemes to calculate various admissions averages.

  Use the Rating Components Table page to assign the admissions averages rating component (ADAVG) to the rating scheme, and to enter the SQC that the process uses to calculate averages.

  When setting up the rating scheme for calculating admissions averages, be sure to select the Final Value check box on the Rating Components Table page. You must select this check box for the Evaluation Calculation process (ADMTLRTG.sqr) to consider this rating component in the admissions decision. Selecting this check box also enables you to post the results of the calculation to the application, and to update the Averages for Fin. Aid and Recs (averages for financial aid and records) page.

  The Method field must be set to Automatic to call the averages calculation SQC.

  Important! You must enter ADEVLAVG in the Formula ID field. This is the delivered SQC that the system must run to calculate admissions averages.

- Define an admissions averages evaluation code.

Use the Evaluation Table page to define your evaluation code for admissions averages. Select the rating scheme that you want to use to calculate admissions averages—the averages rating component (ADAVG) must be tied to this rating scheme—in the Overall Rating ID field. This is the hook that ties the evaluation code to the average calculation SQC. In addition, when you prepare to run the Evaluation Calculation process, you enter an evaluation code. The process runs the Evaluation Calculation process on applications that are assigned the same evaluation code.

Important! In order for an application to be considered during the Evaluation Calculation process, the application must have an evaluation code assigned on the Application Evaluation page.

Setting Up Rules for the Admissions Averages SQC

To set up rules for admissions averages SQC, use the Alternate Average Calculations component (PROG_AVG_CALC_DEFN).

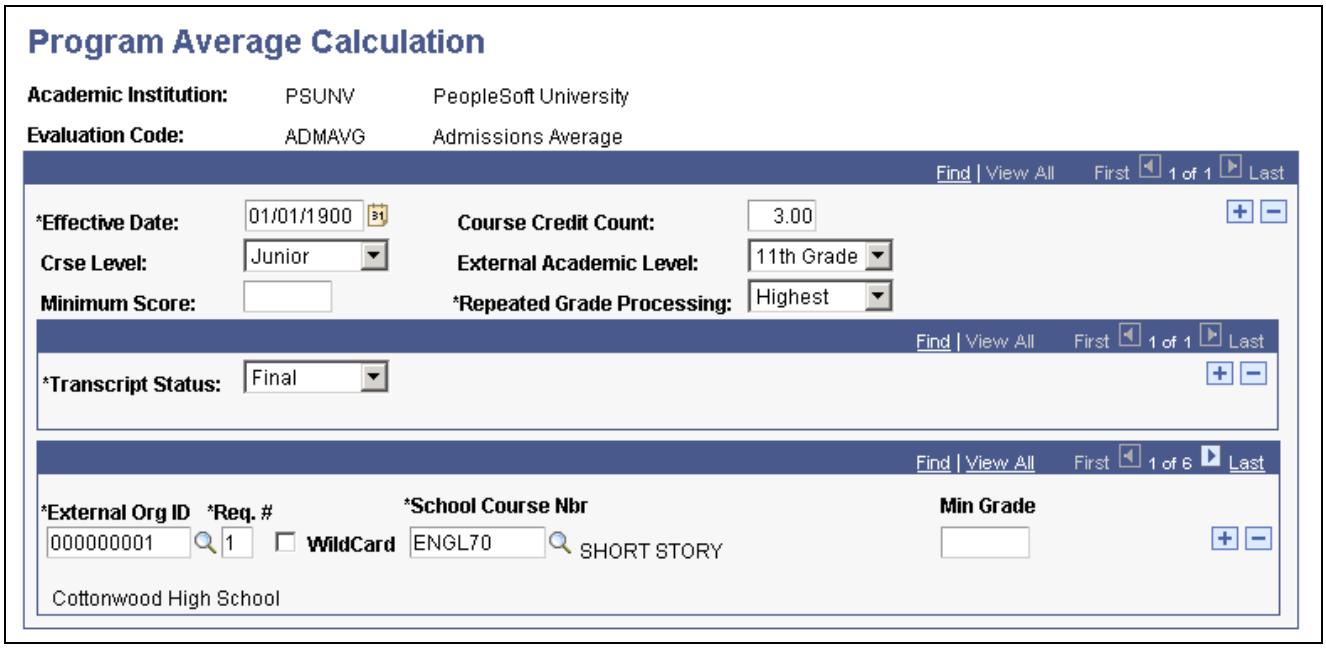
This section discusses how to set up rules for the admissions averages SQC, and provides examples of average program calculation and external courses and admissions averages.

Page Used to Set Up Rules for the Admissions Averages SQC

Page Name	Object Name	Navigation	Usage
Program Average Calculation	PROG_AVG_CALC	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Average Calculations	Set up rules for the delivered admissions averages SQC (ADEVLAVG). Using the criteria that you select in this page, the SQC searches the applicant's external course history to find courses that match the criteria that you set up here. After the process finds a match it takes the official grade from the external course history, converts it to a numerical value if it is not in this format already, and averages it with the other course grades it finds.

Setting Up Admissions Averages SQC Rules

Access the Program Average Calculation page.



Program Average Calculation page

Course Credit Count Enter the minimum number of total course credits that the applicant must have taken in order for the process to calculate an admissions average. The average calculation process looks at each course listed in the External Courses page for this applicant to find matches based on the criteria you select. The process counts the number of course credits for each course. If the process—using the criteria that you set up—cannot find enough matches to add up to your course credit criteria, the process does not generate an average. The process instead produces the following error message: "An average was not calculated because the student has not met the minimum course credit count."

See Chapter 24, "Calculating Admissions Averages," Viewing Admissions Calculation Errors, page 442.

Crse Level (course level) Enter the course level required for this average calculation. The process only looks at external courses that have the value that you select in the Course Level field on the External Courses page.

External Academic Level Enter the external academic level required for this average calculation. The process only looks at external courses that have this external academic level in the Acad Level field on the External Courses page.

Minimum Score Enter a minimum score if you want the process to only include in the calculation average those external courses that contain a score of at least the value that you enter in the Grade In/Official field on the External Courses page. For example, A minimum score of 50 is entered. Thus, an external course that meets all of the other criteria set up on this page but contains a grade of less than *50* is not used in the average calculation.

Repeated Grade Processing Select how you want the process to choose between two or more repeated courses. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are:

First: If the process finds a repeated course, it uses the grade of the first course it finds in the calculation process.

Highest: If the process finds a repeated course, it uses the highest grade of the repeated courses in the calculation process.

Last: If the process finds a repeated course, it uses the grade of the last course it finds in the calculation process.

Transcript Status — Enter the transcript status to be used in this average calculation. The system only uses those applications with this transcript status in the calculation process. You can insert a row to specify more than one transcript statuses.

External Org ID (external organization ID) — Enter the external organization ID that is associated with the course that is to be used in this average calculation.

Req# (requirement number) — Requirement number enables the average calculation SQC (ADEVLAVG) to determine which group of courses should be evaluated together when more than one course can satisfy a program prerequisite.

See Chapter 24, "Calculating Admissions Averages," Viewing an Average Program Calculation Example, page 437.

Wildcard — Select this option if you want to calculate all courses that begin with the value in the School Course Nbr field.

For example, if you entered SCNC in the School Course Nbr field, and selected the Wildcard option, the process would look for any course beginning with SCNC, such as SCNC10, SCNC100, and SCNC15.

School Course Nbr (school course number) — Enter the school course number to be used for this average calculation.

Min Grade (minimum grade) — Enter a minimum grade if you want to override the Minimum Score field for this external course.

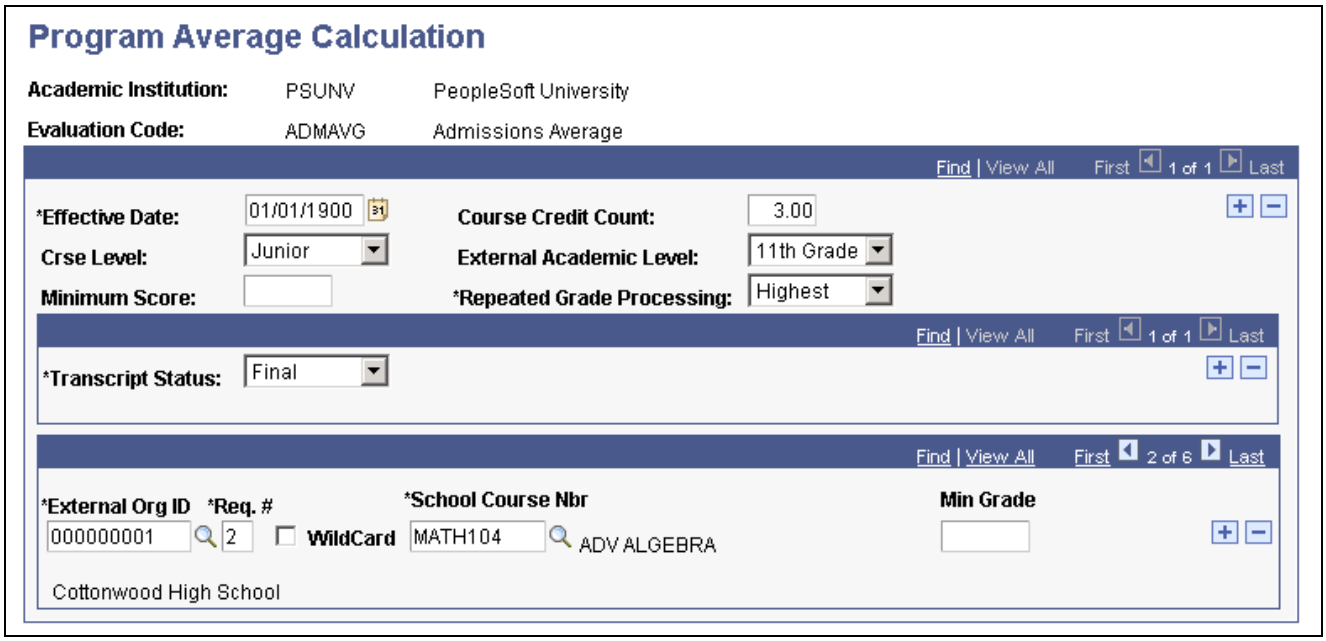
Viewing an Average Program Calculation Example

Suppose that one of the criteria with which you evaluate applicants is a grade point average of a select number of classes. You calculate the average and use the average calculation functionality to evaluate applicants and update the application status.

For example, suppose that you evaluate applicants on the grade point average of the following courses:

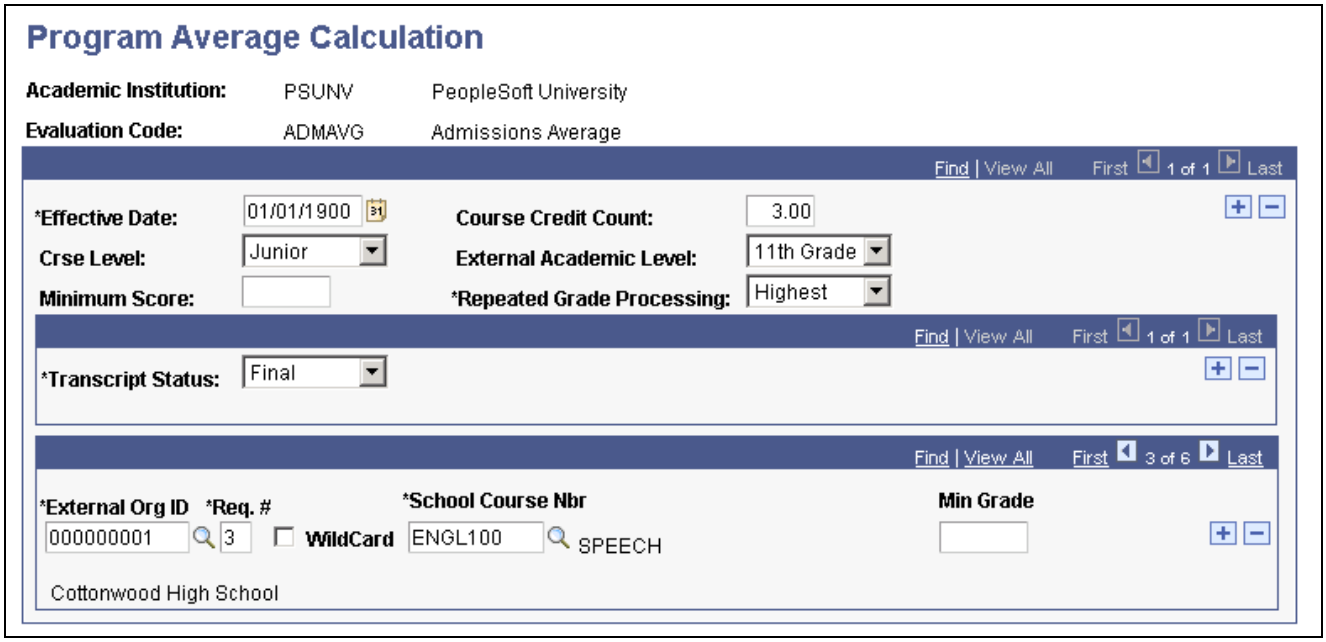
1. ENGL70
2. MATH104
3. One of the following: ENGL100, ENGL92, or SCNC25

Therefore, use an average based on the grades of only three courses in our Evaluation Calculation process. To calculate the average, enter the first course in the Program Average Calculation page just as in the previous page shot. Then, insert a row in the bottom portion of the page and do as follows:



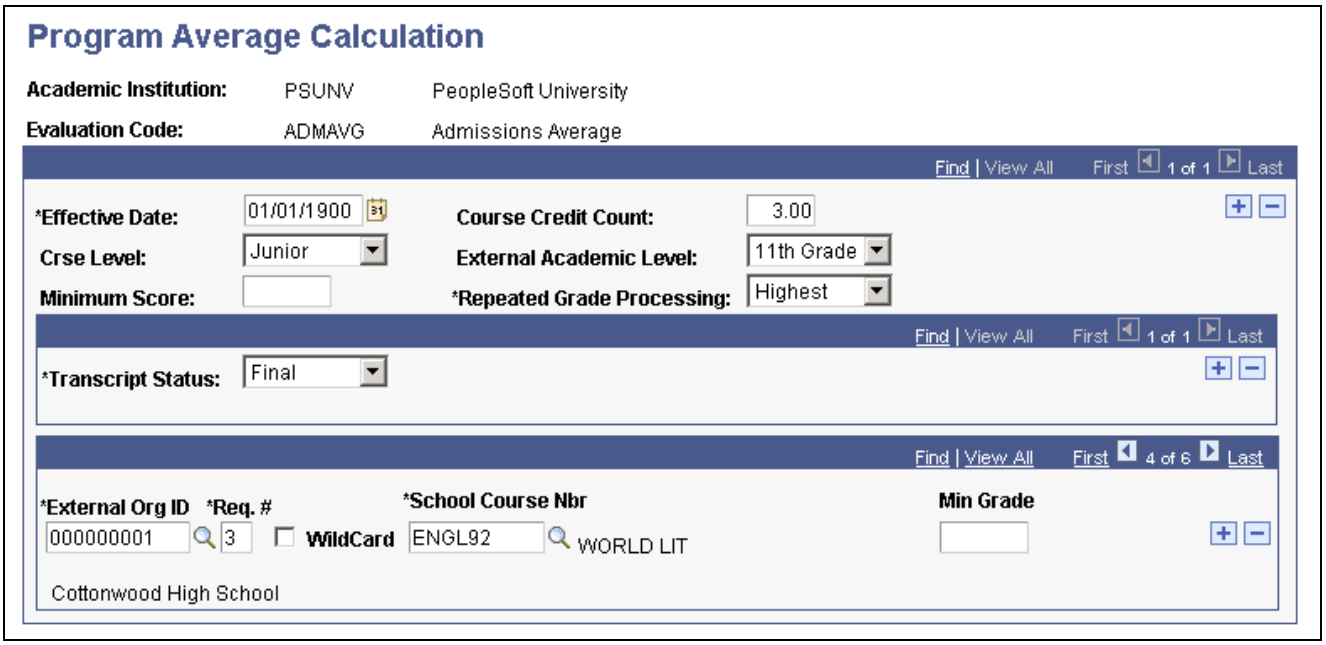
Example of Program Average Calculation page (1 of 4)

Select your second prerequisite in the School Course Nbr field and change the Req# to 2. This tells the system to treat this course as a separate course, and to use the grades that the applicant earned in both of these courses in the calculation. Then insert a row as follows:



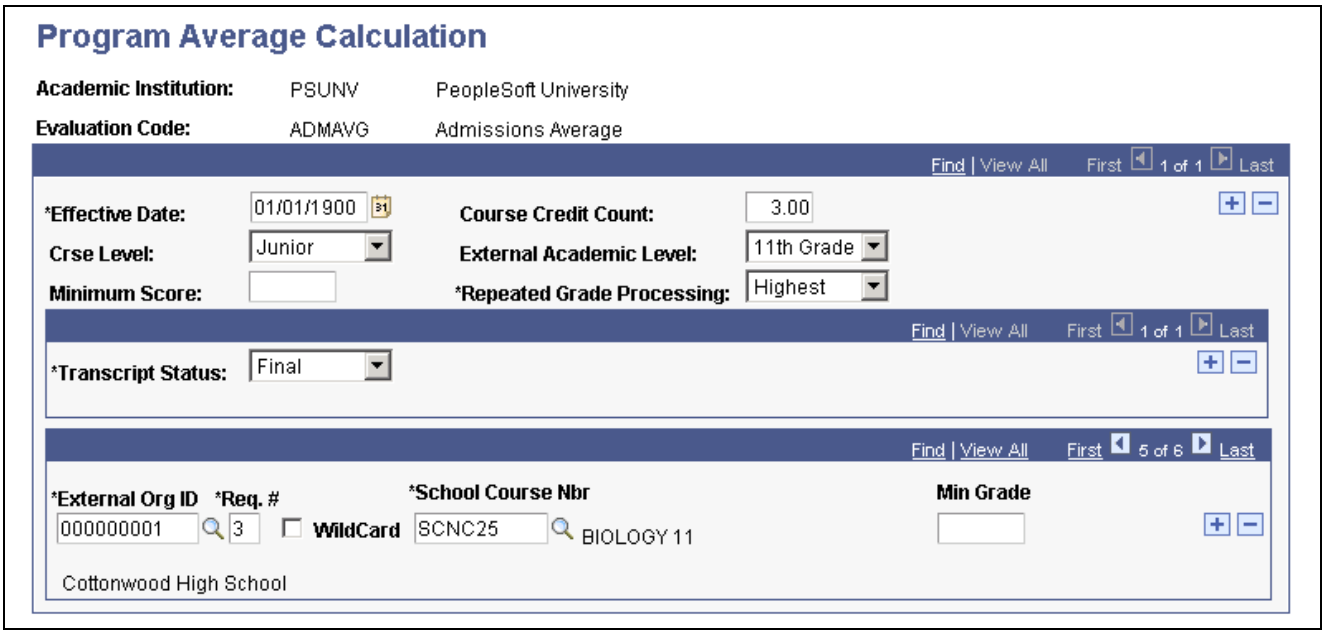
Example of Program Average Calculation page (2 of 4)

Enter a third course in the School Course Nbr field and change the Req# to 3. Then, insert two more rows and select the remaining two courses, but keep the Req# the same.



Example of Program Average Calculation page (3 of 4)

Note in page shot 3 of 4 that Req# is still 3, but you selected a second course.



Example of Program Average Calculation page (4 of 4)

Note in page shot 4 of 4 that Req.# is still 3, but you selected a third course. Because there are three courses with the Req.# of 3, the process only uses one of the courses in the calculation. If the applicant took only one of the courses, the system would use that course. If the applicant took more than one of these courses, the system treats the courses as repeated and selects a class to use in the calculation process based on the option selected in the Repeated Grade Processing field.

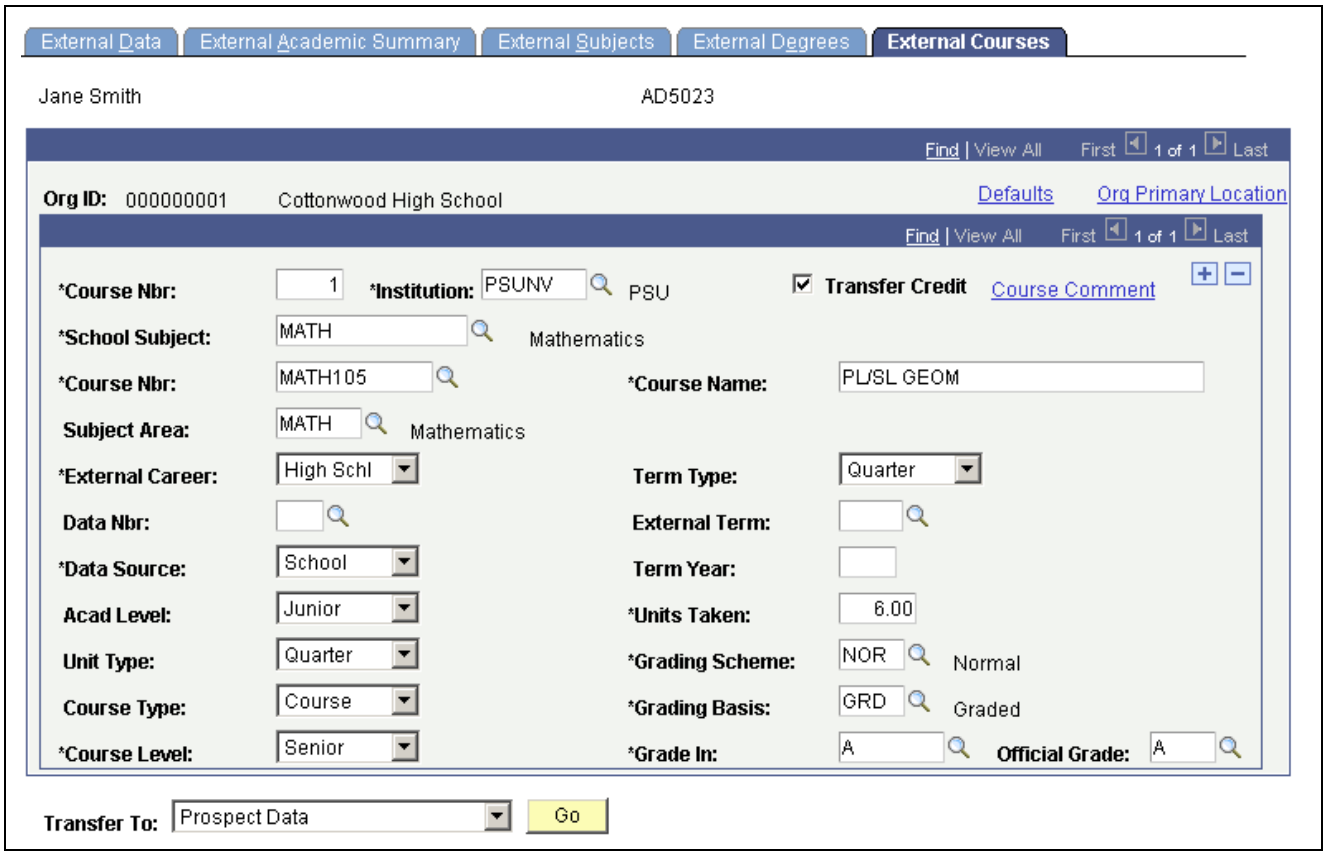
The system averages the scores of ENGL70 and MATH104, and the Highest of ENGL100, ENGL92, and SCNC25. From here, go to the Evaluation Calculation page to run the process and then to the Overall Rating page to view the result in the Rating Value field.

Viewing an External Courses and Admissions Averages Example

The courses that you select on the Program Average Calculation page are assigned to the student on the External Courses page. The calculation process looks at the External Courses page for each student to determine which courses to use in the calculation.

The following example represents an external course for an applicant.

Student Recruiting, Maintain Prospects, Academic Information, Education, External Course or Student Admissions, Application Entry, Academic Information, Education. External Courses



Example of the External Courses page

For this course to be included in the average calculation, the Course Nbr (course number) field on the External Courses page must correspond with the School Course Nbr (school course number) field on the Program Average Calculation page. If you choose a course level and external academic level on the Program Average Calculation page, the process compares that to the Course Level field and Acad Level (academic level) field on this page. If there is a match, then this course is included in the average calculation. The SQL goes down each course on the applicant's record to look for a match based on the criteria that you set up.

The system uses the translated value in the field to the right of the Grd In/Official (grade in/official) field for the average calculation. The average calculation only runs for numeric grades. The average calculation converts non-numeric grades into numeric grades to be used in the average.

Running the Application Materials Extract Process

Before you can run the Evaluation Calculation process you must run a process to link all or a portion of a person's application materials to an application, or you must link the materials manually through the Application Materials page. These materials can then be used for evaluating the application. The Application Materials Extract process extracts the materials associated with the rating scheme that is assigned to the evaluation code. Evaluation codes must be assigned to the applicant on the Application Evaluation page so the Application Materials Extract process knows which records to extract. Ensure that the admissions evaluation code is assigned to the applicants before running the extract process or before linking the materials manually.

See Also

Chapter 21, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 405

Chapter 12, "Tracking General and Application Materials for Prospects and Applicants," Entering General Materials for Prospects and Applicants, page 145

Evaluating Applicants Based on Admissions Averages

After you have properly flagged the external course grades to include in the average calculation—by setting up the rules for the SQC—you can run the Evaluation Calculation process (ADMTLRTG). To run this process, select an evaluation code. By selecting an evaluation code you call the rating scheme (which is tied to the evaluation code). When you defined the rating scheme in an earlier step, you entered the averages SQC. Thus, running the Evaluation Calculation process performs the average calculation.

After the process calculates the average, you can view the result. But if the process encountered an error, you can view the error messages online, correct the error, and re-run the process.

To evaluate applicants based on admissions averages:

- Run the Evaluation Calculation process.
- View the average.
- Correct admissions calculation errors.
- View the admissions calculation errors if necessary.

Page Used to Evaluate Applicants Based on Admissions Averages

Page Name	Object Name	Navigation	Usage
Alternate Avg Calc Messages (alternate average calculation messages table)	AVG_PRCS_MSG_TBL	Student Admissions, Application Evaluation, Alternate Avg Calc Messages	View admissions calculation errors.

Running the Evaluation Calculation Process

Use the Evaluation Calculation page to calculate the admissions average. This process updates the Rating Value field on the Overall Rating page with the newly calculated average.

Enter the evaluation code that calls the appropriate admissions average rating scheme. The rating scheme that you select here must contain the admissions average rating component (ADAVG) and SQC (ADEVLAVG) to calculate the admissions average.

See Also

Chapter 21, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 406

Viewing the Newly Calculated Average

Use the Overall Rating page to view the newly calculated average. After you run the Evaluation Calculation process with the delivered averages SQC (ADEVLAVG), the resulting average appears on this page in the Rating Value field. However, the average only appears on this page when the system successfully calculates the average. If the Evaluated check box is selected but there is no value in the Rating Value field, an error was encountered during the process. The next section describes how to view admissions calculation errors.

See Also

Chapter 20, "Evaluating Applicants," Creating Application Evaluations, page 389

Correcting Admissions Calculation Errors

The Evaluation Calculation process runs for every applicant who has been assigned the evaluation code for which you are running the process. Sometimes an applicant who has been assigned the evaluation code does not meet all of the criteria for calculating an average that you select. For example, if you specify that applicants must have taken the course SCNC100 to be given an average, and an applicant who has been assigned the evaluation code for which you run the Evaluation Calculation process has not taken this course, the process does not generate an average. Instead, the Evaluation Calculation process generates an error message that tells you why it did not generate an average.

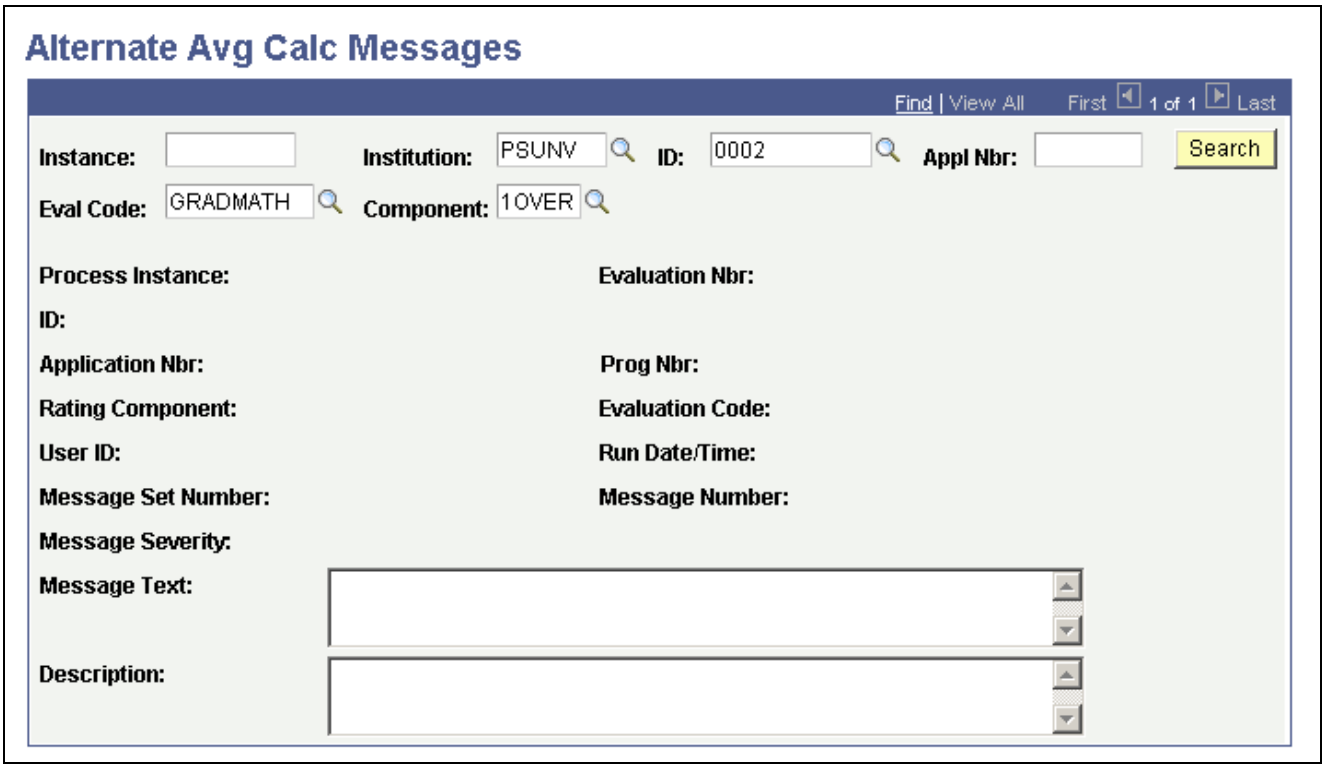
You know that an error occurred when the Evaluated check box is selected but there is no value in the Rating Value field on the Overall Rating page. View Admissions Calculation Errors on the Alternate Avg Calc Messages (alternate average calculation messages) page.

See Also

Chapter 20, "Evaluating Applicants," Creating Application Evaluations, page 389

Viewing Admissions Calculation Errors

Access the Alternate Avg Calc Messages page.



Alternate Avg Calc Messages page

Note. You must enter at least one search parameter in addition to institution.

Instance Enter a process instance. Each time the evaluation process runs, the system assign a number to that specific instance. Enter a process instance number to search for error messages generated during that instance of the process.

ID Select a student's identification number. The system looks for any error messages that the system generated when calculating averages for this ID.

Appl Nbr (application number) Enter an application number. The system looks for any error messages that the Evaluation Calculation process generated when calculating averages for this application number.

Eval Code (evaluation code) Select an evaluation code. The system looks for error messages that the Evaluation Calculation process generated for this evaluation code.

Component Select a rating component. The system looks for error messages that the Evaluation Calculation process generated for this rating component.

Search Click this button to search for messages using the criteria you select.

Error Messages

There are three error messages delivered with the application. The process generates error messages when an applicant who has been assigned the evaluation code does not meet the criteria you specified for the admissions SQC on the Avg Prog Calc page.

- Minimum course credit count not met.

  Description: "An average was not calculated because the student has not met the minimum course credit count."

Example: You enter 60 in the Course Credit Count field on the AVG Prog Calc page but the applicant's total course credit count only equals 58.

Description: "An average was not calculated because the student has not met the minimum grade requirement."

Example: You select 2.0 in the Minimum Score field. The applicant took the prerequisites you specified but did not achieve a grade of 2.0 in that course.

- Program prerequisites have not been met.

  Description: "An average was not calculated because the student does not have the necessary courses to meet the program prerequisites."

  Example: You entered the prerequisite SCNC10 in the School Course Nbr field on the Avg Prog Calc page but this course is not listed on this applicant's external course record.

Running the Application Status Update Process

Use the Application Status Update page to update the application statuses of those applicants for whom the Evaluation Calculation generated an admissions average. These are applicants who were assigned the admissions average evaluation code and who met all of the SQC criteria that you specified on the Program Average Calculation page. This process also updates the Averages for Fin. Aid and Recs page.

Select the evaluation code that contains the admissions average rating scheme. This is the same evaluation code that you used to run the Evaluation Calculation process. The application status update process uses the result from the Evaluation Calculation process to update the applicant's application status.

Note. An SQC defined by your institution determines the status of the application based on the sum of the final evaluation calculation values.

The application status update process also updates the Program Action field on the Application Program Data page.

See Also

Chapter 21, "Evaluating Applicants Using Automatic Processing," page 401

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 175

Updating Admissions Averages for Financial Aid and Student Records

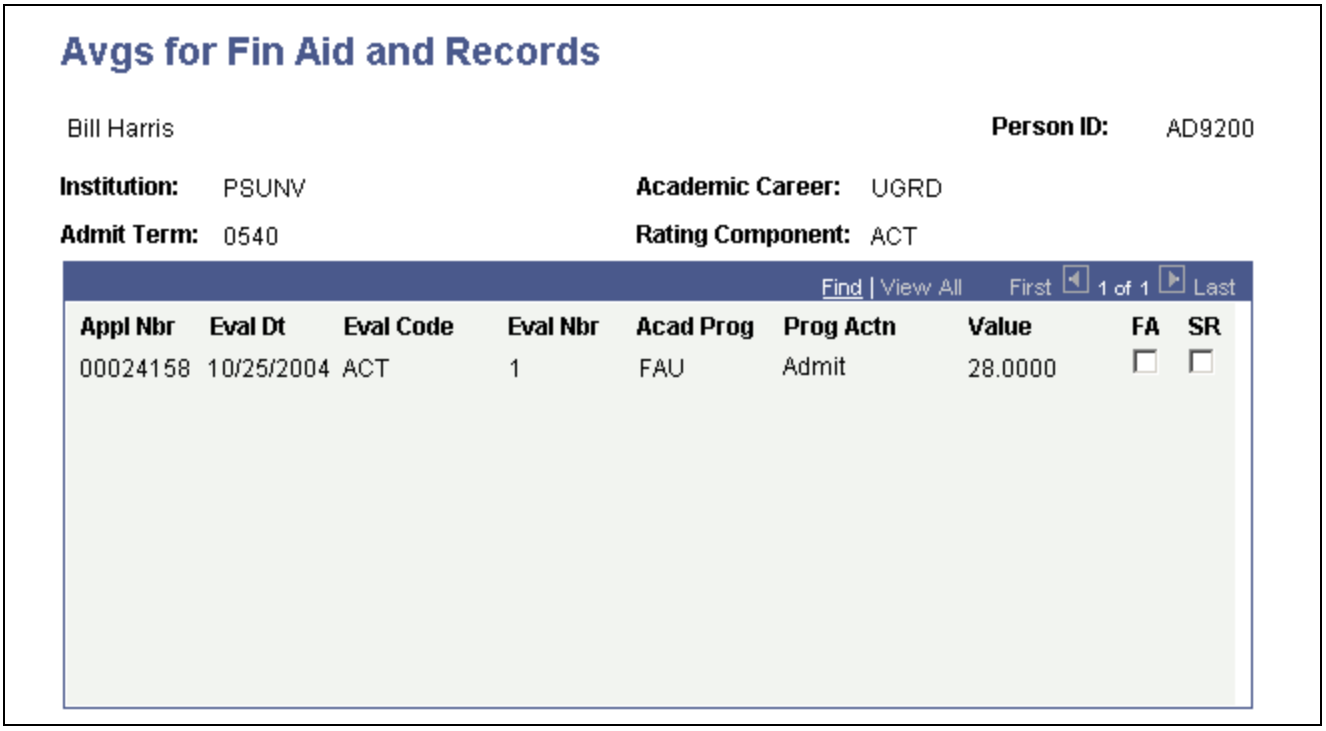
The section discusses how to update admissions averages for financial aid and student records.

Page Used to Update Admissions Averages for Financial Aid and Student Records

Page Name	Object Name	Navigation	Usage
Avgs for Fin Aid and Records (averages for financial aid and student records)	ADM_EVAL_FA_SR_PNL	Student Admissions, Application Evaluation, Avgs for Fin Aid and Records	Update admissions averages in PeopleSoft Financial Aid and PeopleSoft Student Records.

Using the Averages for Fin Aid and Records Page

Access the Avgs for Fin Aid and Records page.



Avgs for Fin Aid and Records page

There are two ways financial aid and student records personnel can use admissions averages. The first way is to access this page and view the averages for specific applicants.

However, if you want to update PeopleSoft Financial Aid and PeopleSoft Student Records automatically, you can write SQRs that extract the information from PeopleSoft Recruiting and Admissions. First, write an SQR to turn on or off the FA (financial aid) and SR (student records) check boxes. This SQR tells the system which application numbers you want to make available to PeopleSoft Financial Aid and PeopleSoft Student Records. Second, write an SQR to extract the admissions average data. The SQR(s) that you write should extract the averages and send them to PeopleSoft Financial Aid to be used in determining awards, and to PeopleSoft Student Records so the averages travel with the applicant throughout his or her career at your organization.

CHAPTER 25

Using Admissions Average Cutoff Reports

This chapter provides an overview of the admissions average cutoff report and discusses how to generate the report.

Understanding the Admissions Averages Cutoff Report

PeopleSoft Recruiting and Admissions enables you to assess an evaluated applicant pool to determine the admissions average that drive certain program actions. For example, you might need to know how many applicants within an evaluation code, who have admissions averages between 85 and 100, have the program action of ADMT.

To generate an admissions average cutoff report:

1. Set up the criteria that determine the content of the report.

   The report tallies the number of applicants who:

   - Are assigned the specified evaluation code, have an admissions average that falls within the range, and have the appropriate program action based on the range you define.
   - Are assigned the specified evaluation code, have an admissions average that falls within a defined range, but do not have the appropriate program action based on the range you define.
   - Are assigned the specified evaluation code (the total number of applicants assigned this evaluation code).

2. Run the average cutoff report process (ADAVGCUT.sqr).

   The process retrieves the rating component that is attached to the admissions average SQC (ADEVLAVG.sqc). Next, the process tallies applicants based on the program actions and value ranges that you specified on the Average Cutoff Report page. Finally, the process generates a report according to your Process Scheduler settings and calls it adavagcut.lis.

Generating Admissions Average Cutoff Reports

To set up the average cutoff table, use the Average Cutoff component (AVERAGE_CUTOFF_TBL).

This section discusses how to:

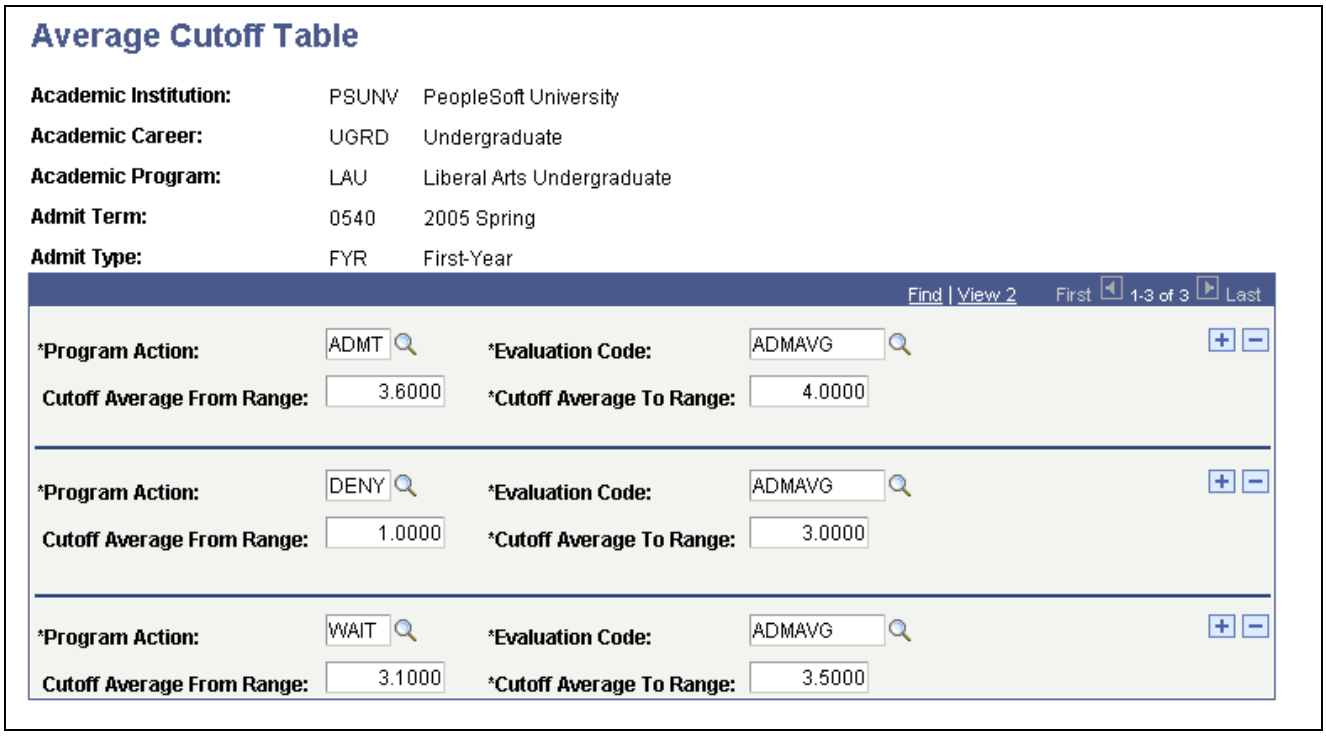
- Set up the average cutoff table.
- Generate the Admissions Average Cutoff report.

Pages Used to Generate Admissions Average Cutoff Reports

Page Name	Object Name	Navigation	Usage
Average Cutoff Table	AVG_CUTOFF_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Average Cutoff Table, Avg Cutoff Table	Set up the criteria that you want the system to report.
Average Cutoff Report	RUNCTL_ADAVGCUT	Student Admissions, Reports, Average Cutoff Report	Run the average cutoff report.

Setting up the Average Cutoff Table

Access the Average Cutoff Table page.



Average Cutoff Table page

Program Action Enter the program action that an applicant should be assigned if his or her average falls within the range that you enter. The report displays the number of applicants whose average falls within this range but *are not* assigned this program action, as well as those who fall within the range and who *are* assigned this program action.

Evaluation Code Enter the evaluation code for which you want to generate a cutoff report. The system only queries applications that are assigned the evaluation code that you enter here for the program action and average range.

Cutoff Average from Range Enter the minimum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

Cutoff Average to Range Enter the maximum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

In the previous page shot, all applications to the undergraduate liberal arts program for admit term Fall 2001 with the first year admit type, that are assigned the evaluation code ADMAVG and that have an average between 3.6 and 4.0 inclusive appears on the report under the program action of "Admit." Those applications with an average between 1.0 and 3.0 inclusive appears on the report under the program action of "Deny." Those applications with an average between 3.1 and 3.5 inclusive appears on the report under the program action of "Wait".

See Also

Appendix A, "PeopleSoft Recruiting and Admissions Reports," PeopleSoft Recruiting and Admissions Reports: Selected Reports, page 512

CHAPTER 26

Creating Alternate Program Offers

This chapter provides an overview of alternate program offers and discusses how to:

- Assign alternate evaluation codes.
- Select applicants for alternate offers.
- Assign alternate programs.

Understanding Alternate Program Offers

When applicants do not meet the requirements for their requested program, you can evaluate them in alternate programs, thereby giving them a second chance to attend your organization. For example, an applicant might get denied to your highly competitive engineering program but when re-evaluated for a less competitive program the same applicant might get accepted.

To create alternate program offers you must first assign an alternate academic program and an alternate evaluation code. You select the primary academic program to which the person is applying (such as FAU), and then specify the alternate program (such as LAU). Thus, all applicants who get denied or waitlisted for FAU, in this example, get evaluated in the LAU program.

After you have assigned alternate program evaluation codes, you run the Assign Alternate Eval Codes process (ADALTEVL.sqr) that assigns alternate evaluation codes to applicants. You will select applicants based on academic institution, the academic program that they requested, and the admit term. For example, if you select the program LAU and admit term 0450, the process will assign an alternate evaluation code to applicants who applied to but were denied or waitlisted to LAU in Fall 2001.

After you have assigned alternate evaluation codes to applicants, you must either run the materials extract process, or assign the materials manually. Then you must run the Evaluation Calculation process to evaluate them in the new program using the new evaluation code that you just assigned to them.

After the Evaluation Calculation process calculates the overall rating score, you run the Alternate Programs process (ADALTPRG.sqr). The Alternate Programs process compares the minimum rating score that you define to the overall rating score that the Evaluation Calculation process calculates. If the applicant meets the criteria, the Alternate Programs process inserts a new row in the person's application (adm_appl_prog) for the existing application number and assigns a new program number. Thus, you still have access to the application in which the person was denied or waitlisted.

Assigning Alternate Evaluation Codes

To set up alternate evaluation codes, use the Alternate Offer component (ALT_OFFER_TABLE).

This section discusses how to assign alternate evaluation codes.

Page Used to Assign Alternate Evaluation Codes

Page Name	Object Name	Navigation	Usage
Alternate Offer Table	ALT_OFFER_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Offer Table	Assign alternate offer program evaluation codes to academic programs.

Using the Alternate Offer Table Page

Access the Alternate Offer Table page.

Alternate Academic Program Enter the alternate program. Any person who applies and is either denied or waitlisted to the academic program that you specified upon entering this page will be evaluated in the alternate program that you enter here. For example, you can set it up so that any person applying to LAU, who is denied or waitlisted in that program, will be evaluated in *FAU* using the *ACT* evaluation code.

Alternate Evaluation Code Enter the evaluation code the system will use to evaluate the applicant in the alternate program. For example, an applicant who was denied or waitlisted in the undergraduate engineering program using the UGENG evaluation code may be accepted into the Liberal Arts program using the ACT evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Selecting Applicants for Alternate Offers

This section discusses how to select applicants for alternate offers.

Page Used to Select Applicants for Alternate Offers

Page Name	Object Name	Navigation	Usage
Assign Alternate Eval Codes (assign alternate evaluation codes)	RUNCTL_ADALTEVL	Student Admissions, Processing Applications, Assign Alternate Eval Codes	Run the Alternate Averages process. The process assigns the alternate evaluation code that you set up on the Alternate Offer Table page to any applicants who applied to the academic institution and academic program for the admit term that you select.

Using the Assign Alternate Eval Codes - Parameters Page

Access the Assign Alternate Eval Codes page.

Institution Enter the academic institution to which the academic program belongs.

Academic Program Enter the academic program. This is the original academic program to which the applicants applied but into which they were not admitted. The process assigns the alternate evaluation code to any applicant who applied to this academic program—in the admit term you specify—and has a program action of *Deny, Waitlist,* or *Waitlist Offer Accepted.*

If a student meets the above criteria but already has an application to the alternate program, the Alternate Averages process *does not* assign the alternate program code.

Admit Term The process only assigns the alternate evaluation code to applicants who were denied or waitlisted in this term.

Click Run to run the Alternate Averages process at user-defined intervals.

Assigning Alternate Programs

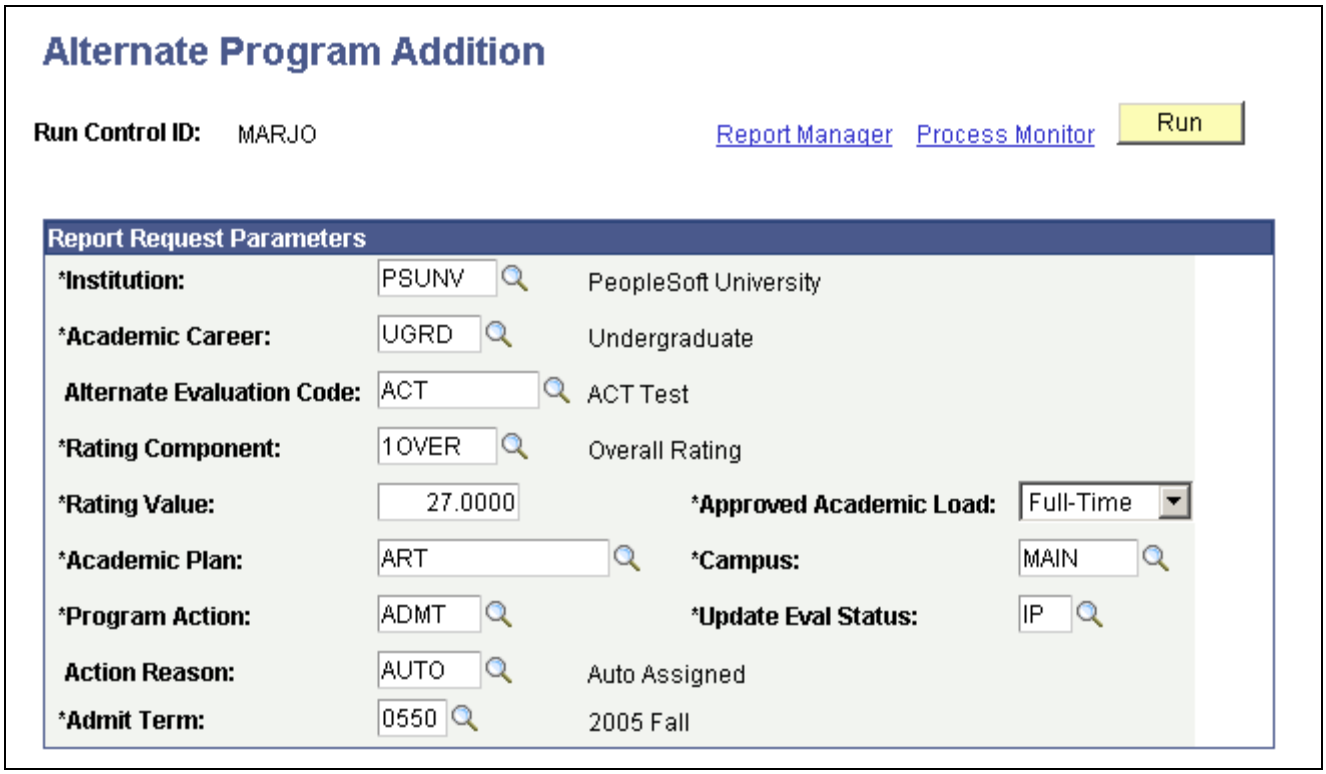
This section discusses how to run the Alternate Programs process to assign alternate programs, and provides an example of how alternate programs are assigned to students.

Page Used to Assigning Alternate Programs

Page Name	Object Name	Navigation	Usage
Alternate Program Addition	RUNCTL_ADALTPRG	Student Admissions, Processing Applications, Alternate Program Addition	Run the Alternate Programs process. The Alternate Programs process updates applications by comparing the minimum score that you enter on this page to the overall rating that the Evaluation Calculation process calculates. The Alternate Programs process uses the information that you define on this page to update information in the new application row.

Running the Alternate Programs Process

Access the Alternate Program Addition page.



Alternate Program Addition page

Institution Enter the academic institution for which you want to run the process.

Academic Career Enter the academic career for the alternate academic program.

Alternate Evaluation Code Enter the alternate evaluation code that is assigned to the applicants to be evaluated. The Alternate Programs process updates the applications of only those applicants who have been assigned this alternate evaluation code. Therefore, you must have already run the Alternate Eval Code process to assign applicants an alternate evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Rating Component Enter the rating component that you want to use to evaluate applicants. The rating component defines the format and meaning of the rating value. For example, in the preceding page shot, you selected the ACT rating component. The rating value therefore represents the minimum ACT score that can be admitted into the alternate program.

Rating Value Enter the minimum score for consideration in the alternate program. The Alternate Programs process compares this score to the overall rating value that the Evaluation Calculation process calculates. If the overall rating value is equal to or more than the value you enter in this field, then the applicant is accepted into the alternate program. In the above example, the applicant must score at least 27 on the ACT to be accepted into the alternate program.

See Chapter 26, "Creating Alternate Program Offers," Assigning Alternate Programs, page 453.

Note. After an applicant is accepted into the alternate program, the Alternate Programs process creates a new row in the person's application (adm_appl_prog) for the existing application number. The system assigns a new program number for the new program and plan into which the person was accepted.

Approved Academic Load Enter the academic load that you want the process to assign to anyone who meets the criteria defined on this page.

Academic Plan Enter the academic plan that you want the process to assign to anyone who meets the criteria defined on this page.

Campus Enter the campus that you want the process assign to anyone who meets the criteria defined on this page.

Program Action Enter the program action that you want the process assign to anyone who meets the criteria defined on this page.

Update Eval Status (update evaluation status) Enter the evaluation status that you want the process to assign to anyone who meets the criteria defined on this page.

Action Reason Enter the action reason that you want the process to assign to anyone who meets the criteria defined on this page.

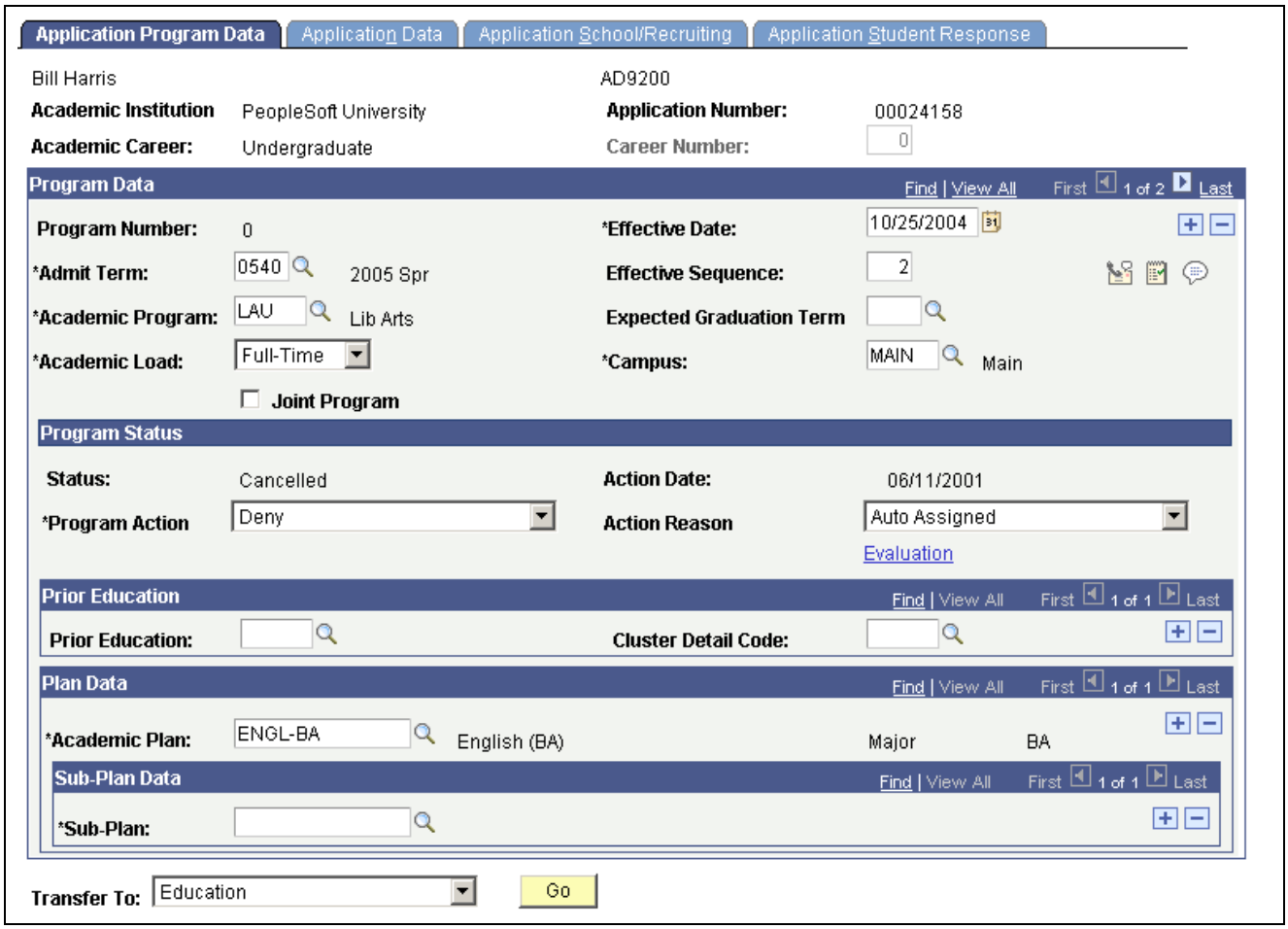
Admit Term Enter the admit term that you want the system to assign to anyone who meets the criteria defined on this page.

In the above example, applicants to the undergraduate career at PSUNV with an alternate evaluation code of *ACT* and an ACT score of at least *27* will receive a program action of *Admit*.

Click Run to run the Alternate Programs process at user-defined intervals.

Viewing an Example of How Alternate Programs are Assigned to Students

The following person applied and was denied to the FAU program. Note that the program number is *0,* the academic program is *LAU,* and the program action is *DENY.*



Example of the Application Program Data page

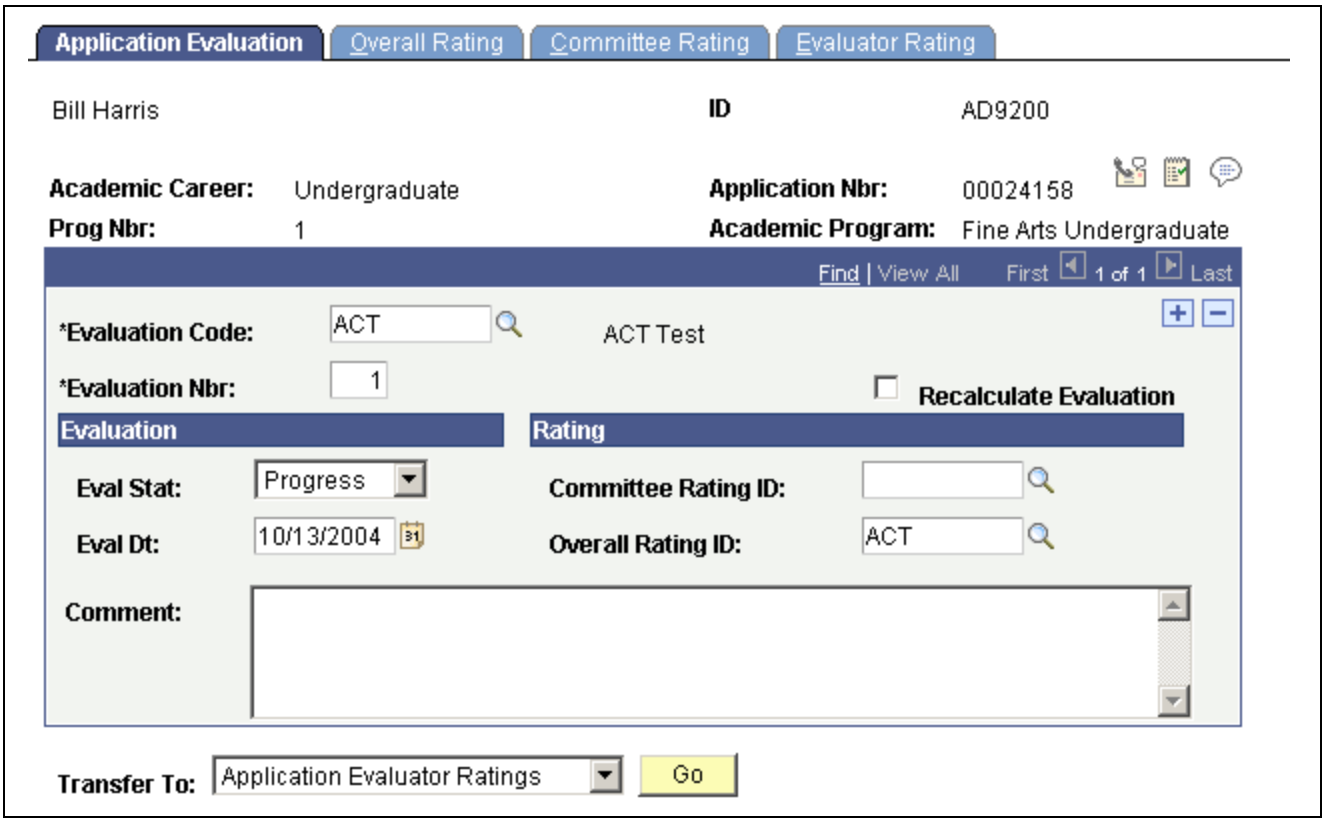
- First, you set up the Alternate Offer Table page, which enables applicants who were denied or waitlisted in LAU to be evaluated in FAU.

  See Chapter 26, "Creating Alternate Program Offers," Assigning Alternate Evaluation Codes, page 451.

- Then you run the Alternate Averages process (ADALTEVL.sqr).

  See Chapter 26, "Creating Alternate Program Offers," Selecting Applicants for Alternate Offers, page 452.

The Alternate Averages process assigns an alternate evaluation code (ACT) to the person's application, as illustrated in the following page shot. Access the Application Evaluation component under Student Admissions, Application Evaluation, Application Evaluation.



Example Application Evaluation page

Note in the page above that the evaluation code now reads *ACT*.

- This new evaluation code has not been evaluated through the Evaluation Calculation process.

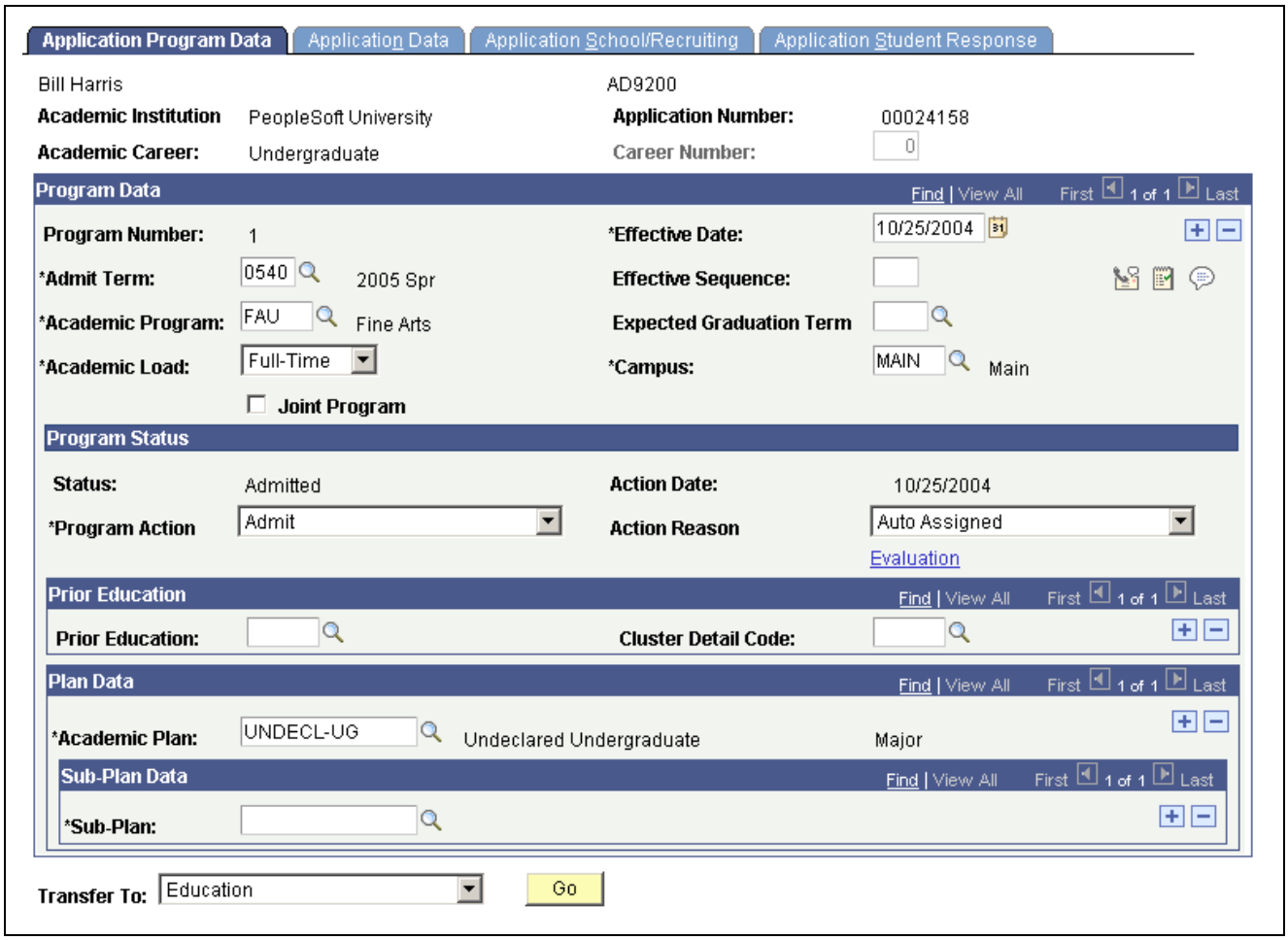
  Therefore, you ran the Materials Extract process to extract the application data, and then you ran the Evaluation Calculation process to calculate the overall rating score based on the rating components for the ACT evaluation code.

  See Chapter 21, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 405.

  See Chapter 21, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 406.

- Next you run the Alternate Program process (ADALTPRG.sqr), which compares the minimum score that you enter on the Alternate Program Addition - Parameters page to the overall rating score that the Evaluation Calculation process calculates.

The applicant in our example was denied in his requested program (LAU), but was accepted into the alternate program (FAU), as illustrated in the following page shot. Maintain Applications is found on Student Admissions, Application Maintenance, Maintain Applications



Example Application Program Data page

Note that the program number is now *1*. The Alternate Programs process inserted a new row and incremented the program number by one. Thus, the program action of *DENY* for LAU still exists in the student's record. This new row contains the new academic program *FAU* (the alternate program) and note that the program action is *ADMT*. The Alternate Programs process also updated the remaining parameters that you selected on the Alternate Program Addition page, such as the action reason, campus, academic load, and so forth.

By evaluating this applicant in an alternate program, you were able to admit a person whom you would have otherwise denied.

CHAPTER 27

Updating Application Program Actions and Statuses

This chapter provides an overview of admissions program actions and statuses and discusses how to:

- Update the program action and status of one application.
- Update program actions and statuses of multiple applications.
- Update program actions and statuses using mass change.

Understanding Admissions Program Actions and Statuses

As applicants move through the admissions process, you must take action on their academic program and update their program status. You can update a single application, a group of applications, or you can use a mass change definition to update a large number of applications. When you enter new program actions, you will enter new effective dates. Thus, you can maintain a history of previous actions.

As you begin using program actions and statuses provided with PeopleSoft Recruiting and Admissions, start with the most straightforward cases to become accustomed to the process. Then begin to work on the special cases, such as deferrals, reconsiderations, and so forth.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the Program Action field in the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.

A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision.*

For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

If you Select this Program Action:	The System Updates the Program Status to:
Application Readmit Application Reconsideration	Applicant

If you Select this Program Action:	The System Updates the Program Status to:
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values require a substantial programming effort. You can, however, modify the *descriptions* of these values. Keep in mind, though, that the altered description needs to retain its original meaning to avoid confusion.

The Program Status values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC - Active in Program
- AD - Admitted
- AP - Applicant
- CN - Cancelled
- DE - Deceased
- PM - Prematriculant
- WT - Waitlisted

Reviewing Admissions Program Action Definitions

The previous section details which admissions program actions set which program statuses. The chart below lists Program Action definitions and provides additional information about what happens when you choose a Program Action. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	After an action of reconsideration is taken, you can admit the applicant. You cannot take an action of *Admit* if the program status is *Cancelled.* You must first select a *Reconsideration* action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your application center setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a *Conditional Admit* action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	Same as for *Admit*.
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a *Cancelled* status from an *Admitted* or *Active* status.	When revoking admission for a person who has a current action of *Matriculation,* and therefore an *Active* status, you must go to Records and Registration to take this action on the Student Program/Plan component. When you revoke admission from Records and Registration, the Student program information is deleted and your application information is updated as *Cancelled Due to Admission Revocation.* If the person never had an action of matriculation, you can add an *Admission Revocation* action directly in PeopleSoft Recruiting and Admissions.
Deny	A person has been denied admission to an academic program.	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with *Before Decision* as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A *Waitlist Withdrawal* reason indicates someone who did not want to accept a place on the waitlist.	None.
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a *Prematriculant* status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of *First Deposit.*	None.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of *Matriculation,* you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. After you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

Updating the Program Action and Status of One Application

Use the Application Program Data page to update the program action and status of one application. If you only have *one* application to update, do so through the Maintain Applications component.

See Also

Chapter 14, "Adding and Updating Applications," Entering Application Program Data, page 175

Updating Program Actions and Statuses of Multiple Applications

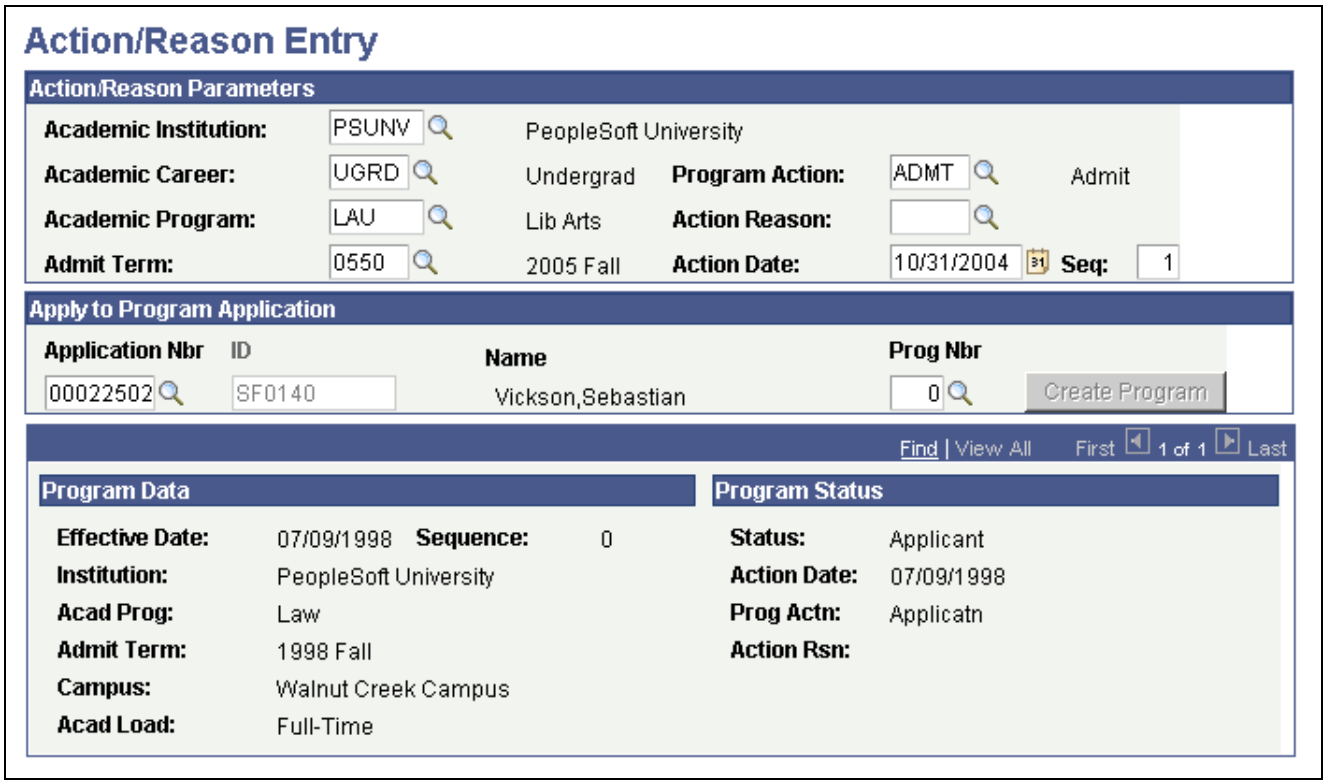
This section discusses how to update program actions and statuses of multiple applications online.

Page Used to Update Program Actions and Statuses of Multiple Applications

Page Name	Object Name	Navigation	Usage
Action/Reason Entry	ADM_ACT_ENTRY	• Student Admissions, Application Evaluation, Application Decisions, Action/Reason Entry • Student Admissions, Application Maintenance, Action/Reason Entry	Update multiple applications to an identical program action and status. If you must update a *group* of applications which are for the same academic program and admit term with the same program action, it is faster to do so through this page, as opposed to one at a time on the Application Program Data page.

Updating Program Action and Status of Multiple Applications

Access the Action/Reason Entry page.



Action/Reason Entry page

Admit Term Select an admit term. Admit terms are defined on the Term Values Table page.

Program Action Select the program action to be entered on the applications you are updating. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Action Reason Select an action reason to be entered on the applications if you have defined any reasons for this program action. Values for this field are defined in the Action Reason Table page.

Action Date The default for the action date is your system date.

Seq (sequence) If the action you are taking has the same date as the current action, enter a *1*. Enter a *2* for another action on the same date, and so on. The default sequence is *0*.

Application Number and **ID** Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the ID field.

Program Number Select the program number if the application has multiple program numbers. When you navigate out of this page or click the Refresh button, you can verify that you have the correct person and application by reviewing the information displayed in the Program Data and Program Status group boxes.

Create Program After entering an application number, click this button to update the program data for the application number that you enter. This button is only available to click if you entered a program action of *MATR*.

Calculate Deposits Click this link to calculate deposits. The Calculate Deposits page appears. This link appears if you have entered a program action of *ADMT* and you have set up deposits for the application center.

Updating Program Actions and Statuses of Multiple Applications

This section provides an overview of how to update program actions and statuses of multiple applications and discusses how to run the Application Program Update process.

Understanding Multiple Application Program Action and Status Updates

If you have a large number of applications you want to update with the same program action, action reason, and academic program status, you can use a background process.

To update program actions and statuses of multiple applications:

1. Set Up your Mass Change Definition.

   Use the Mass Change Definition - Description page to enter your mass change definition. The mass change definition defines the criteria for selecting which applications should be updated. PeopleSoft provides a sample mass change definition called *Application Program Update Select.* However, your institution might have defined its own mass change definition for updating program information, or, your institution might have changed the shipped sample.

   See *PeopleSoft PeopleTools PeopleBooks*

2. Specify your Mass Change Criteria and Defaults.

   Use the Mass Change Definition - Criteria and Defaults page to set up your mass change criteria. You also choose the program action and action reason codes to be added to the selected application records. The system automatically updates the program status according to the action taken.

   There is one SQL statement execution sequence for this Mass Change Definition: *Select Applicant Criteria.*

   In the Defaults group box, select the codes you want added to the new program row for the selected applications. You may select values for program action and action reason. For example, you might be updating these applications with a program action of *DENY*, and an action reason of *AUTO*. These two fields are stored on the Application Program Data page.

3. Generate your SQL Statement to Select the Applications to be Updated.

   Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition. Click the Clear Sw button then the Generate SQL button so do this. After generating the SQL, select Save. After setting up your mass change definition and generating your SQL statement, you are ready to process your mass change.

4. Run a Mass Change Group to Select the Applications to be Updated.

   Use the Run Mass Change page to process your mass change and select the actual applications to be updated during the Application Program Update process. This process selects the actual applications to be updated.

Because you want to delete any data in the temp file before running this process, you can use a mass change group that PeopleSoft provides, which deletes the temp using the delivered Communication - Delete Temp mass change definition and runs your *Application Prog Update Select* mass change definition.

Select *Application Prog Update Base* in the Mass Change Group ID field. If you want to create a different Mass Change Group or modify *Application Prog Update Base*, use the Mass Change Group component before running the mass change group on Run Mass Change. On Run Mass Change, click the Execute Mass Change Group radio button to make the Mass Change Group ID field available for selection.

5. Run the Application Program Update process to do the actual updating of applications.

   Use the Application Program Update page to update the program data of the selected applications. A new row of program data is added to the selected applications on the Application Program Data page.

Pages Used to Run the Application Program Update Process

Page Name	Object Name	Navigation	Usage
Application Program Update	RUNCTL_PROGUPDT	Student Admissions, Processing Applications, Update Applications, Application Program Update	Update the program data of the selected applications. This process uses the applicants selected when running the mass change group to insert the program action and program reason defined on the Criteria and Defaults page of the Mass Change Definition component. You must first process your mass change group before running the application program update process.
Mass Change Definition	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Definition	Define criteria for applications to be updated.
Mass Change Group	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Group	Define the execution sequence for the mass change definitions.
Run Mass Change	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Run Mass Change	Run the mass change group to select the application to be updated via the application program update process.

CHAPTER 28

Managing Enrollment

This chapter provides an overview of enrollment management targets and discusses how to:

- Set up enrollment management.
- Perform enrollment management.
- Use enrollment management target templates.
- Generate enrollment management reports.

Understanding Enrollment Management Targets

This section discusses:

- Enrollment management targets.
- Cohort, population, and division.
- Examples of enrollment management targets.

Learning About Enrollment Management Targets

Enrollment Management is an extremely flexible feature. Although there are many ways in which your institution can use Enrollment Management, you must first think about how you want to set up and use this tool. By spending time now thinking about the design, you will save yourself much valuable time later on.

Because this feature is so flexible, we can only show you examples of how you might want to use it. There are virtually no rules, only possibilities. How you set up and design your enrollment management targets can be as simple or as complex as you want.

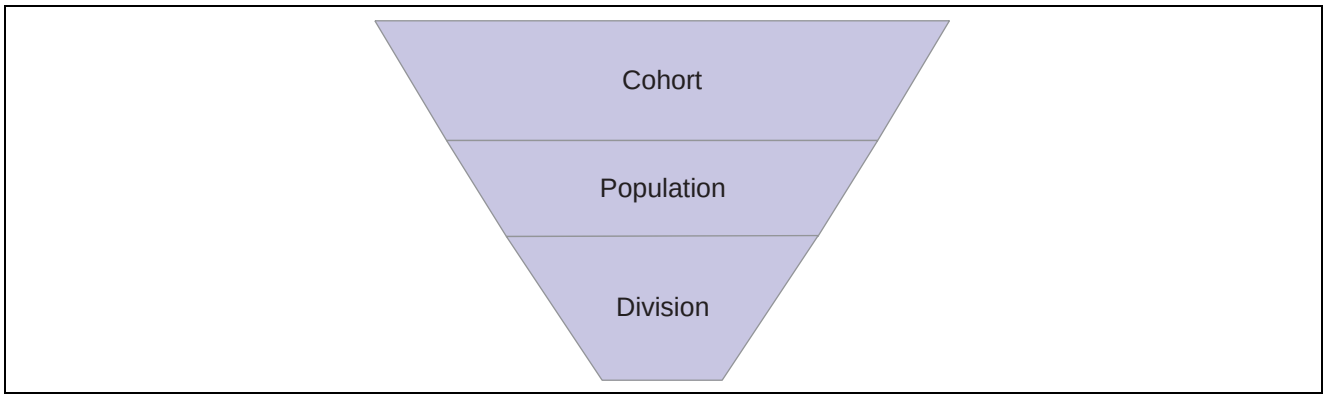
With PeopleSoft Recruiting and Admissions, you can store the following types of enrollment management information:

- Target enrollment numbers.
- Actual enrollment numbers.

You can also group target enrollment numbers and actual enrollment numbers into levels that you define.

Learning About Cohort, Population, and Division

Enrollment management targets are set up using a three-level structure that consists of the following elements: cohort, population, and division. These terms can mean whatever you need them to mean. Cohort, population, and division are different levels, from highest to lowest, that you set up, define, link to one another and for which you set targets. They are conceptually similar to the three-level structure found in communications.



Enrollment Management Level Structure

Cohort is the highest of the three levels. The cohort is the starting point for your target development. An example of a cohort level you could define is the entire group of students in an academic year. You could define a cohort level of 2005 and set an enrollment target of 500 students for that academic year. Alternatively, you could break this up into a cohort level for academic terms of Fall 2005 and Spring 2006.

Population is the next level down the hierarchy. You could define a population level by academic career. Or, you could define a population level by school or college. It is entirely up to you how you define each level.

Division is the final bottom level in the enrollment management target setup. You could define a division level, for example, by gender, ethnicity, academic program, admit type, or program status. There are numerous options for how to break down and define enrollment management levels.

Viewing Examples of Enrollment Management Targets

The following examples illustrate how enrollment management targets can be set up.

Example 1 - One Detail

Suppose that the PeopleSoft University College of Engineering is concerned about enrolling more women. You want to conduct a recruiting effort to target women for the 2005 academic year. You might consider setting up the following enrollment management target to track your efforts. The following table shows a *detail* enrollment management target.

Detail Target	
Cohort	2005 Academic Year
Population	College of Engineering
Division	Female
Target	*200*

Example 2 - Two or More Details (a Group)

Now, let's suppose that you want to break this down from the 2005 Academic Year into targets for each term, Fall and Spring. This is the place to introduce the idea of a *group* enrollment management target. In this case, you set up two detail enrollment management targets and join them as a group to form one group enrollment management target. Instead of one detail with a cohort for the entire academic year of 2005 (Example #1), now you have two detail targets defined; one with a cohort for each term and a target of 100 (Example #2). You can combine two or more details into one group enrollment target.

	Group Enrollment Management Target	
	Detail Target #1	Detail Target #2
Cohort	Fall 2005	Spring 2006
Population	College of Engineering	College of Engineering
Division	Female	Female
Target	100	100

Example 3 - More Details

Let's make the example a little more complicated. The College of Engineering consists of four different academic programs: Mechanical Engineering, Chemical Engineering, Electrical Engineering, and Civil Engineering. Let's say you want each program to set its own targets, not just one overall target for the entire College of Engineering. Assume that you are setting the target for the entire 2005 Academic Year, and not by term this time. You could set up a group of four detail enrollment management targets, one for each program as follows:

	Group Enrollment Management Target			
	Detail #1	Detail #2	Detail #3	Detail #4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Chem. Eng.	Elect. Eng.	Civil Eng.
Division	Female	Female	Female	Female
Target	100	100	100	100

Example 4 - Complex Details

Now, let's add another layer of complexity. Suppose that the College of Engineering is concerned not only with enrolling more women, but also with enrolling other underrepresented minorities as well: African Americans, Native Americans, and Latinos. You want to set up enrollment management targets for all women and underrepresented minorities for the 2005 Academic Year for each of the four academic programs within the College of Engineering. That's 16 different enrollment management target details. Here's one way how you could set this up:

	Detail 1	Detail 2	Detail 3	Detail 4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Mech. Eng.	Mech. Eng.	Mech. Eng.
Division	Female	African American	Latino	Native American
Target	100	100	100	100
	Detail 5	Detail 6	Detail 7	Detail 8
Cohort	2005	2005	2005	2005
Population	Chem. Eng.	Chem. Eng.	Chem. Eng.	Chem. Eng.
Division	Female	African American	Latino	Native American
Target	50	50	50	50
	Detail 9	Detail 10	Detail 11	Detail 12
Cohort	2005	2005	2005	2005
Population	Elect. Eng.	Elect. Eng.	Elect. Eng.	Elect. Eng.
Division	Female	African American	Latino	Native American
Target	25	25	25	25
	Detail 13	Detail 14	Detail 15	Detail 16
Cohort	2005	2005	2005	2005

	Detail 1	Detail 2	Detail 3	Detail 4
Population	Civil Eng.	Civil Eng.	Civil Eng.	Civil Eng.
Division	Female	African American	Latino	Native American
Target	20	20	20	20

In the preceding example, a group enrollment target that you define could consist of *all* 16 of the detail targets, but it does not have to. You could set up a group of the horizontal detail targets in the above table, or a group of the vertical detail targets, and so on. It all depends on what you want to do with the information, and how you want to get at it and report on it. There are several possible ways to use the enrollment management targets as tools in your recruiting efforts.

Setting Up Enrollment Management Targets

To set up enrollment management targets, use Enrollment Target Division component (TARGET_DIV_TABLE), Enrollment Target Population (TARGET_POP_TABLE), and the Enrollment Target Cohort component (TARGET_COH_TABLE).

This section explains how to define for enrollment management the following items:

- Divisions
- Populations
- Cohorts

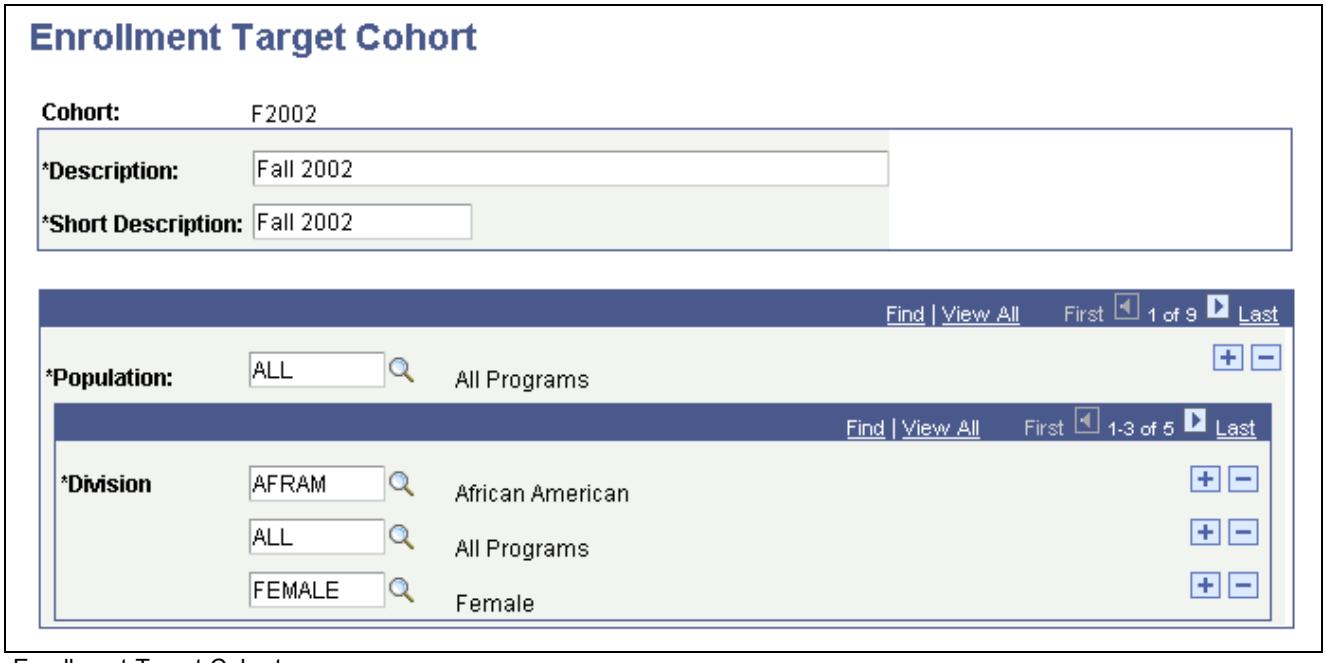
  Start by defining divisions and then define populations and cohorts, because you attach divisions and populations to cohorts.

Pages Used to Define Divisions, Populations, and Cohorts

Page Name	Object Name	Navigation	Usage
Target Division Table	TARGET_DIV_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Division, Target Division Table	Define a division.
Target Population Table	TARGET_POP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Population, Target Population Table	Define a population enrollment management target.
Enrollment Target Cohort	TARGET_COH_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Cohort	Define a cohort enrollment management target.

Defining a Cohort

Access the Enrollment Target Cohort page.



Enrollment Target Cohort page

After you set up your divisions and populations, you set up the cohort. As an example, set up an enrollment target level that tracks the enrollment of women, in all university programs, for the Fall 2002.

Population Select the populations that you want to attach to this cohort. In this example, you attached the population of All Programs to the Fall 2002 cohort. You

can attach multiple populations to a cohort. Define populations on the Target Population Table page.

Division Select the divisions that you want to attach to this cohort. In our example, you attached the African American, Female and All Program divisions to the Fall 2002 cohort. You can attach multiple divisions to a cohort. Define divisions on the Target Division Table page.

Performing Enrollment Management

This section discusses how to:

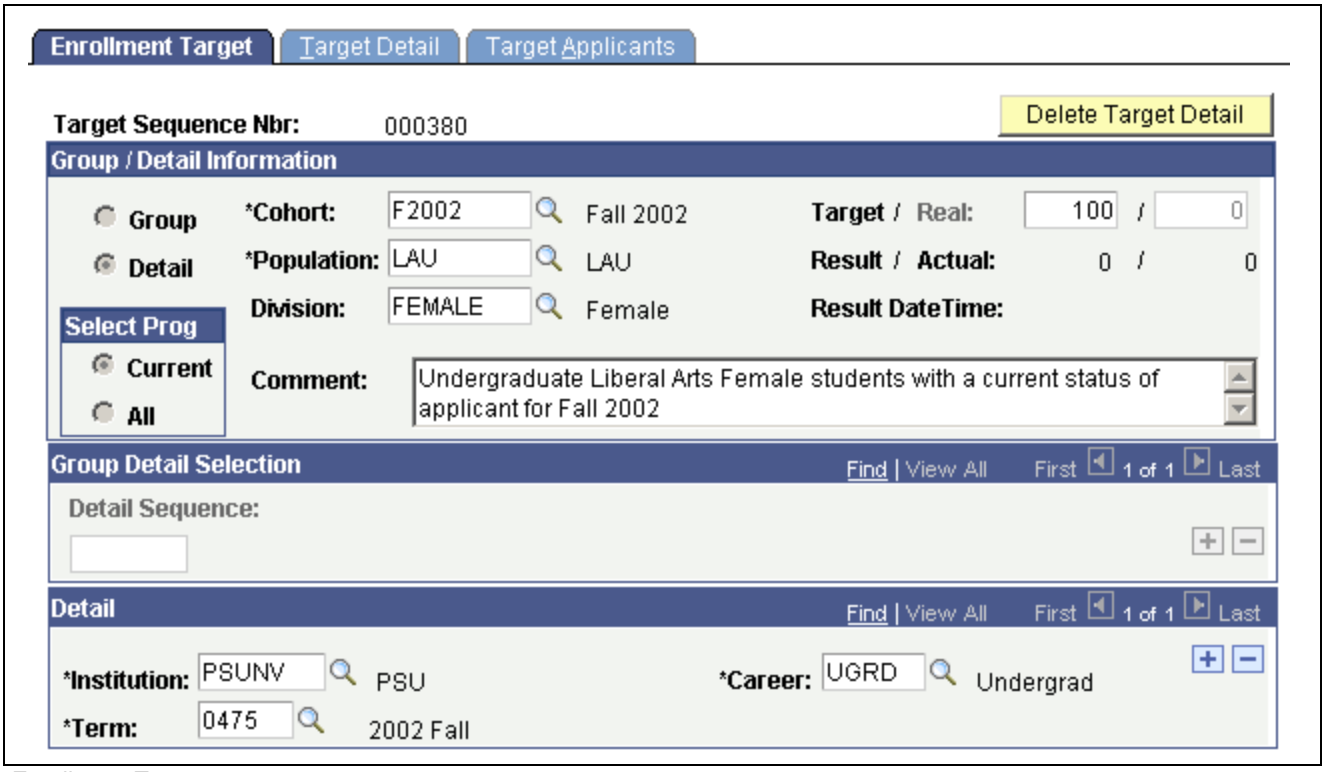
- Define enrollment management targets.
- Set additional target detail.
- Process enrollment management targets.
- Display enrollment management target results with the Enrollment Target page.
- Display enrollment management target results with the Enrollment management Summary page.

Pages Used to Perform Enrollment Management

Page Name	Object Name	Navigation	Usage
Enrollment Target	ENRL_MGMT_TARGET	Student Admissions, Enrollment Targets, Define Enrollment Targets, Enrollment Target	Set enrollment targets for each level that you defined.
Target Detail	ENRL_MGMT_DETAIL	Student Admissions, Enrollment Targets, Define Enrollment Targets, Target Detail	Specify additional details about a target.
Target Applicants	ENROLL_MGMT_ID	Student Admissions, Enrollment Targets, Define Enrollment Targets, Target Applicants	Display a list of all the people that meet the target selection criteria. The Enrollment Target process populates the values in this page. A list of people who meet your target selection criteria appears on the bottom section of the page. For each person, it displays the ID, name, application number, program number, and the number of times that person is counted for this detail or group. If you are displaying a detail target, then this field is always *1*. If you are displaying a group target, then this number could be anything depending on the number of times the person met the criteria for each detail target within the group.
Calculate Enrollment Targets	RUNCTL_ENRL_TARGET	Student Admissions, Enrollment Targets, Calculate Enrollment Targets	Process the enrollment management target and obtain current results. After you have set up and defined your enrollment management target levels, you can run the Enrollment Target process at any time to obtain the results and see how your institution is doing with its efforts towards these targets.
Enrollment Target Summary	ENROLL_TARGET_SUMM	Student Admissions, Enrollment Targets, Enrollment Target Summary, Enrollment Target Summary	View enrollment management target results.

Defining Enrollment Management Targets

Access the Enrollment Target page. You must have already defined cohorts, populations, and divisions.



Enrollment Target page

Group/Detail Information

Group Select this option if you are setting up a group enrollment management target consisting of multiple detail targets.

Detail Select this option if you are setting up a detail enrollment management target. This is the default setting.

Cohort Select the cohort for this enrollment management target.

Population Select the population for this enrollment management target.

Division Select the division for this enrollment management target.

Target Enter the target number for this enrollment management target.

Result After you run the Enrollment Target process, this field displays the total number of application rows meeting the target selection criteria.

Actual After you run the Enrollment Target process, this field displays the total number of people meeting the target selection criteria. If it is a detail row, the Actual field contains the same number as the Result field.

Real After you run the Enrollment Target process, this field displays the same value as the Result field. For group targets, you can change this field to any number between (and including) the result and actual number.

For example, suppose that for a group target of Fall 2005 undergraduate enrollment, the Result field displays *100*. However, suppose that some of these people applied for two or more programs. Therefore, the Actual field displays *80*. The Real field defaults to *80* but you can change it to any number within that range that is appropriate, for example, *90*. You can use the Target Applicants page to view a list of the people who meet your target selection criteria and verify the correct *real* number. You can also use the Enrollment Management Summary page to view results.

Result Date/Time After you run the Enrollment Target process, the date and time the most recent results were calculated for this enrollment target appear.

Select Prog

Choose an application program setting:

Current Select this option to have the Enrollment Target process check only the most current application row. If a student is in this application program, and matches the target selection criteria, he or she is included in the count.

All Select this option to have the Enrollment Target process check all the application rows. If a student has any application program row that matches the target selection criteria, he or she is included in the count.

For example, suppose that a person has applied to the LAU academic program as illustrated in the following table:

Program	Effective Date	Status
LAU	03/01/05	Admitted
LAU	01/01/05	Applied

You create an enrollment target detail in which the program = *LAU* and the status = *Applied,* then:

If you select the All option, the student is included in the enrollment target count on 3/01/05.

If you select the Current option, the student is *not* included in the enrollment target count on 3/01/05. The student's most current application program status (highest effective date) is *Admitted.*

Group Detail Selection

Detail Sequence Use this field only if you are creating a group enrollment management target that consists of a series of detail targets. You would select all the detail targets here.

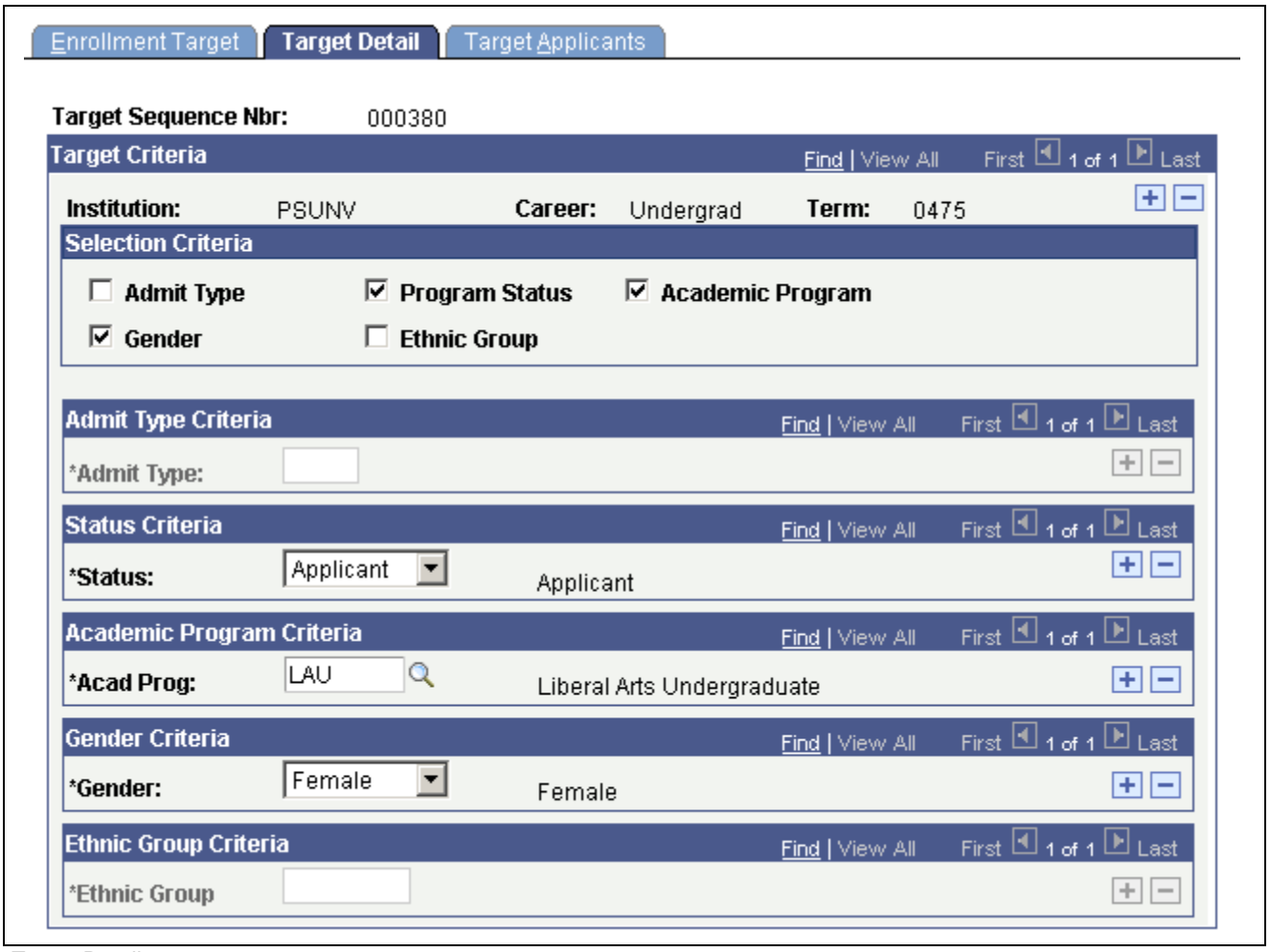
Detail

Career Select the academic career for this enrollment management target.

Term Select the term for this enrollment management target.

Setting Additional Target Details

Access the Target Detail page.



Target Detail page

In the Selection Criteria group box, select any additional criteria that you want to use to define your target. These are selection criteria beyond the academic institution, academic career, and academic term that you defined on the Enrollment Target page. The specific cohort, population, and division should drive the selection of any of these fields.

Admit Type Select this check box if you want to define your target by admit type. After you select this check box, the Admit Type field becomes available for input.

Program Status Select this check box if you want to define your target by program status. After you select this check box, the Status field becomes available for input.

Academic Program Select this check box if you want to define your target by academic program. After you select this check box, the Acad Prog (academic program) field becomes available for input.

Gender Select this check box if you want to define your target by gender. After you select this check box, the Gender field becomes available for input.

Ethnic Group Select this check box if you want to define your target by ethnic group. After you select this check box, the Ethnic Group field becomes available for input.

If this detail comprised your entire enrollment management target, then you are done. Remember to save the page. If you are creating a group enrollment management target and this was just one detail target, display the Enrollment Target page again and specify your additional detail targets. Use the Group - Detail Selection field to pull in all the detail targets you must specify (roll up into) the group enrollment management target.

Note. The Target Applicants page displays only the list of students meeting the selection criteria *after* you have run the Enrollment Target process.

Processing Enrollment Management Targets

Access the Enrollment Target page. You must first set up the target detail on the Enrollment Target and Target Detail pages.

Cohort Select the cohorts for which you want to process enrollment management targets.

Click Run to run the Enrollment Target process at user-defined intervals.

Displaying Enrollment Management Target Results

After you have run the Enrollment Target process, you can display the results to see how your institution is currently doing with its recruiting efforts towards the target. There are two ways that you can obtain enrollment management target information:

- Through the Enrollment Target page.

  After you have run the enrollment management target process for a specific enrollment management target, you can use the Enrollment Target page to display the calculated enrollment figures.

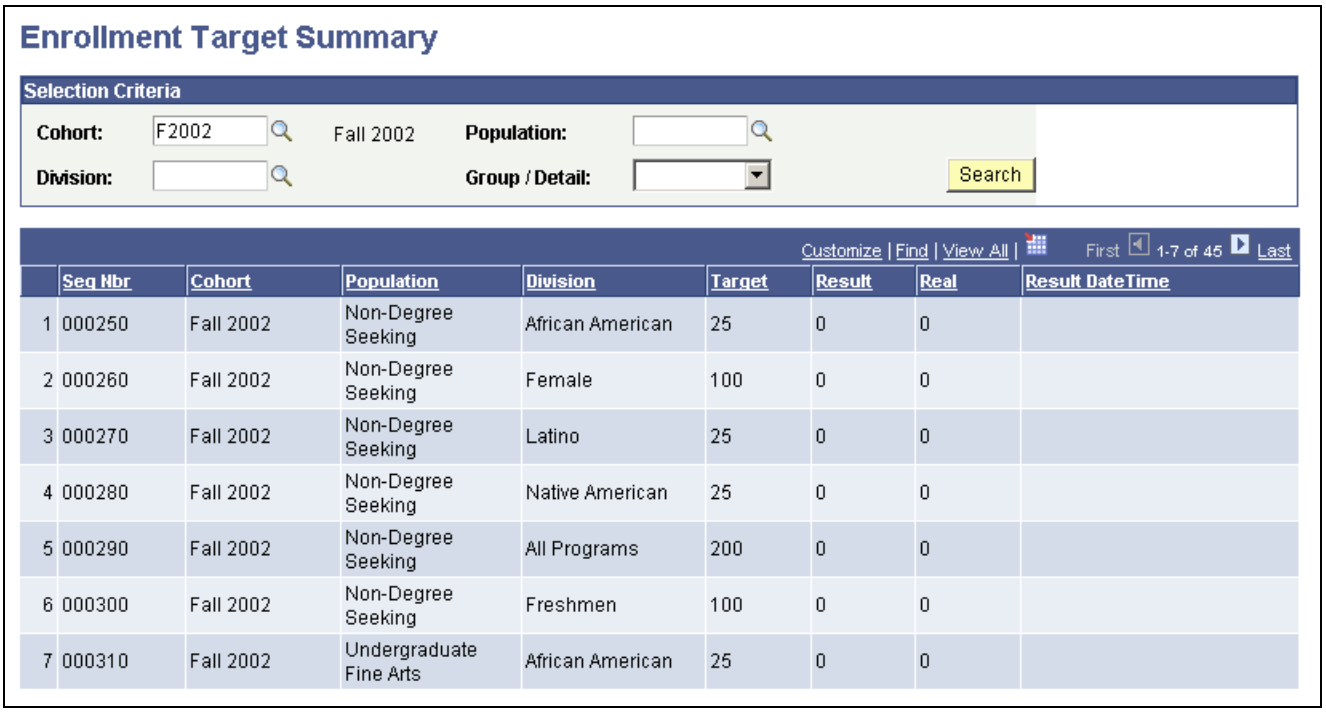
- Through the Enrollment Management Summary page.

See Also

Chapter 28, “Managing Enrollment,” Setting Up Enrollment Management Targets, page 473

Displaying Target Results with the Enrollment Management Summary Page

Access the Enrollment Target Summary page. You must first run the Enrollment Target process.



	Seq Nbr	Cohort	Population	Division	Target	Result	Real	Result DateTime
1	000250	Fall 2002	Non-Degree Seeking	African American	25	0	0	
2	000260	Fall 2002	Non-Degree Seeking	Female	100	0	0	
3	000270	Fall 2002	Non-Degree Seeking	Latino	25	0	0	
4	000280	Fall 2002	Non-Degree Seeking	Native American	25	0	0	
5	000290	Fall 2002	Non-Degree Seeking	All Programs	200	0	0	
6	000300	Fall 2002	Non-Degree Seeking	Freshmen	100	0	0	
7	000310	Fall 2002	Undergraduate Fine Arts	African American	25	0	0	

Enrollment Target Summary page

Entering Selection Criteria

Cohort, Population, and **Division** — Select the cohort, population, and division for which you want to display targets.

Search — Click to display the specified target results.

Viewing Results

The bottom section of the page displays the target results in the following columns:

Seq Nbr (sequence number) — The target sequence number.

Cohort — The defined cohort.

Population — The defined population.

Division — The defined division.

Target — The target number you originally set for this enrollment management target.

Result — The current result count for this target.

Real — The current real count for this target.

Result Calculated Date/Time — The most recent date and time these results were last calculated.

Using Enrollment Management Target Templates

Use the Enrollment Management Template feature to easily create new targets by copying the details that you want from existing targets. Using templates makes the process of creating enrollment management targets much simpler. For example, you might have to set up a target detail enrollment for the next term that is identical in all other respects as a target detail for this term. Or, you might want to have exactly the same detail and group targets as last academic year but you must have a different target number. The target template feature can easily handle this, saving you the trouble of having to set up the target details from scratch.

Use the Target Detail Template component to define and use enrollment management templates.

To create enrollment targets using a template:

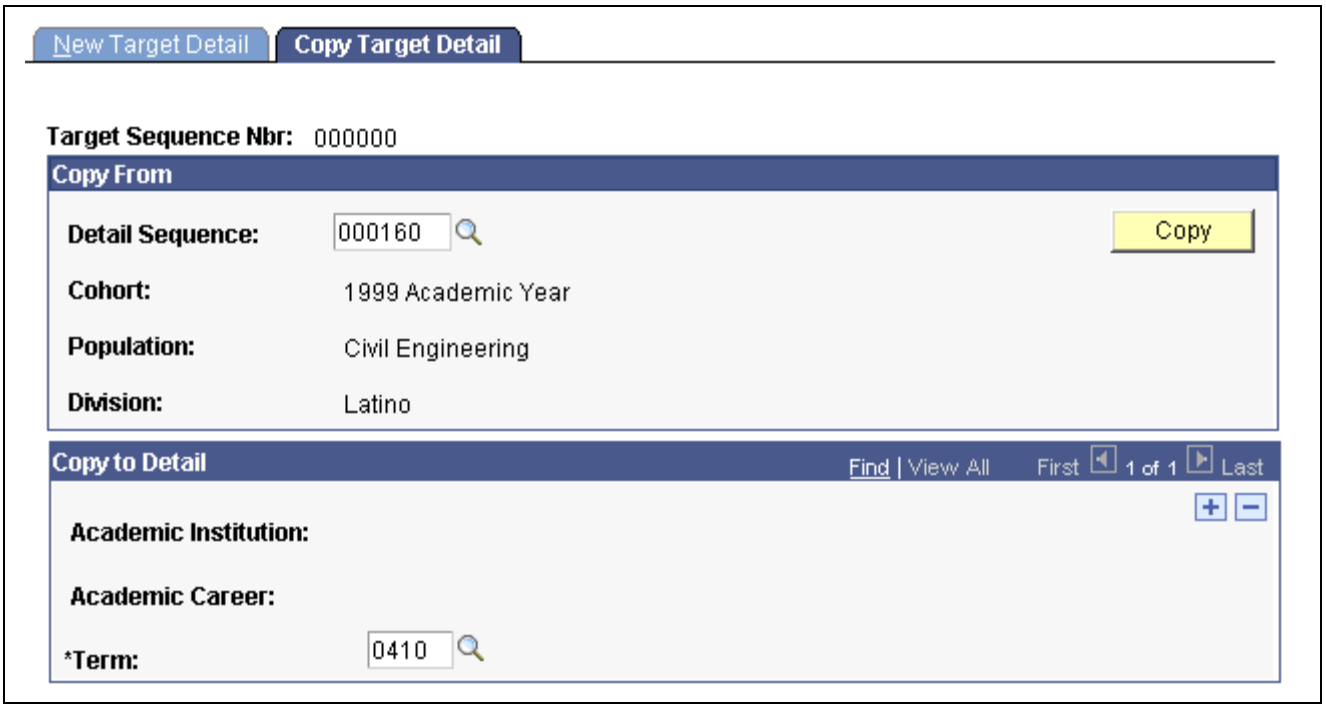
1. Enter new target details.
2. Specify the detail from which you are copying.

Pages Used to Use Enrollment Management Target Templates

Page Name	Object Name	Navigation	Usage
New Target Detail	TARGET_DETAIL_NEW	Student Admissions, Enrollment Targets, Target Detail Template, New Target Detail	Create new enrollment management targets using the target template feature.
Copy Target Detail	TARGET_DETAIL_COPY	Student Admissions, Enrollment Targets, Target Detail Template, Copy Target Detail	Specify the target information you are copying from for the new detail target.

Selecting the Target Information from the Old Detail

Access the Copy Target Detail page.



Copy Target Detail page

Detail Sequence Select the detail sequence number of the detail from which you are copying. The system displays the corresponding cohort, population, and division, if applicable.

Term Select the term for the new detail you are creating.

Copy Click to copy the detail template from the old to the new target.

After you save the page, you can display the new detail template and change only the items you have to for the new target, rather than recreating everything from scratch.

Generating Enrollment Management Reports

This section discusses how to generate three different enrollment management reports:

- Enrollment Target Cohort Table.
- Target Population Table.
- Target Division Table.

Pages Used to Generate Enrollment Management Reports

Page Name	Object Name	Navigation	Usage
Enrollment Target Cohort	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Cohort	Create a report listing the enrollment target cohort levels you have defined.
Enrollment Target Population	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Population	Create a report listing the enrollment target population levels you have defined.
Enrollment Target Division	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Division	Create a report listing the enrollment target division levels you have defined.

CHAPTER 29

Loading and Assigning EPS Market Codes

This chapter provides an overview of EPS market codes and discusses how to:

- Set up external organization code types on the Ext Org Code Type Table (external organization code type table) page.
- Load the EPS market codes via the EPS External Load Parms (EPS external load parameters) page. If desired, you can then view the load results and correct any errors.
- View EPS load results.
- Assign EPS market codes to organizations on the EPS Assign Organization Parms (EPS assign organization parameters) page.
- Print EPS market codes (if desired) using the EPS Market Codes Table - Run Control page, and purge the EPS suspense files.

Understanding EPS Market Codes

EPS™ (Enrollment Planning Service) is a geographic and demographic data service offered annually by the College Board to Colleges and Universities. EPS provides information to subscribing institutions about competitors, feeder schools, and demographic strengths and weaknesses. EPS market codes are proprietary market codes owned by the College Board and are used to categorize external organizations and people into geographical areas, mostly in the United States. Some admissions offices use EPS market codes to focus their recruiting efforts in geographic areas in which they believe they will be the most successful. Note that there is a license agreement that you must sign with the College Board to use the EPS geomarket data. However, an institution is not required to purchase EPS to use the PeopleSoft EPS market code functionality.

PeopleSoft Campus Solutions does not provide EPS data; however, it does provide an EPS market code load process and lets you automatically assign the market codes to external organizations.

Setting Up Code Types for EPS Organizations

This section discusses how to set up code types for EPS organizations.

Page Used to Set Up Code Types for EPS Organizations

Page Name	Object Name	Navigation	Usage
External Organization Code Type	EXTORGCDTYPE_TABLE	Campus Community, Organization, Define Organization Data, Ext Org Code Type Table, External Organization Code Type	Define an EPS market code organization code type. When you load EPS data, the EPS External Load process links the EPS data to the external organization code types that you define. Thus, you identify EPS data by the external organization code type to which you link the data.

Setting Up External Organization Code Types

Access the External Organization Code Type page.

Code Type Option Select *EPS* if the external organization code type that you are adding is an EPS market code type. If the code you are adding is *not* an EPS market code, select *None.*

Loading EPS Market Codes

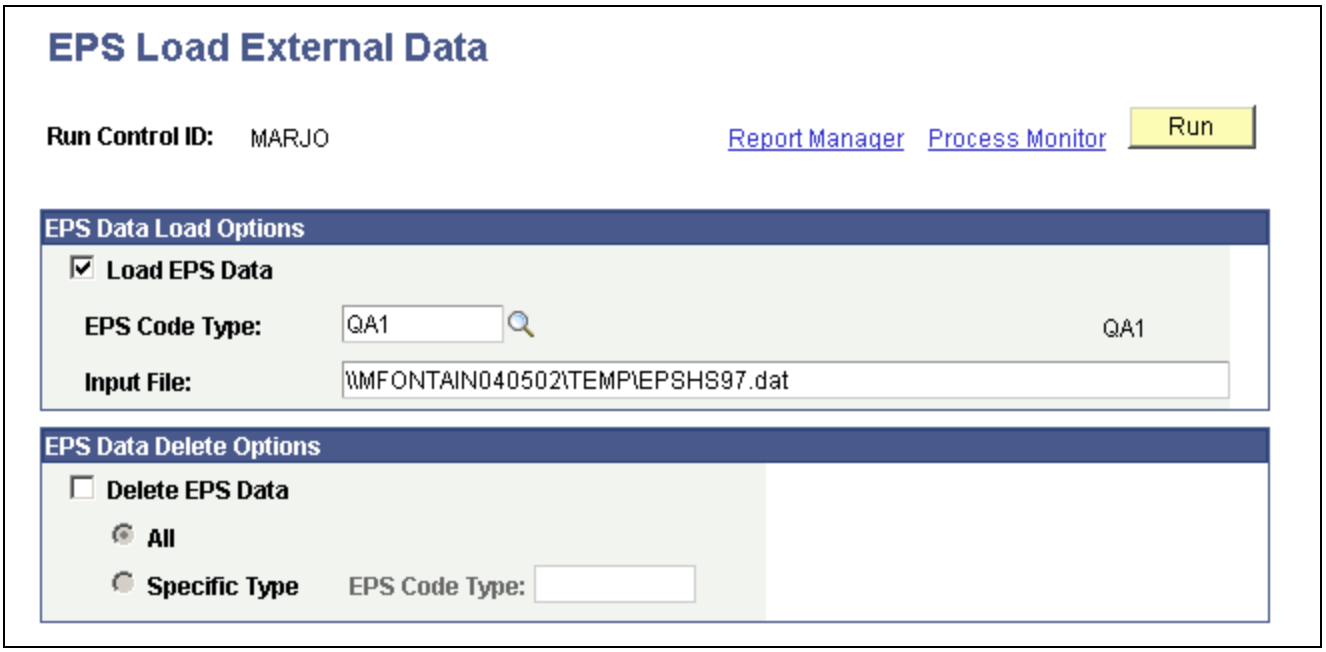
This section discusses how to load EPS market codes.

Page Used to Load the EPS Market Codes

Page Name	Object Name	Navigation	Usage
EPS Load External Data	EPS_LOAD_PARMS	Campus Community, Organization, Organizations Data Load, EPS Load External Data	Run the process to load the EPS market codes for the external organization code type that you defined.

Running the EPS External Load Process

Access the EPS Load External Data page.



EPS Load External Data page

EPS Data Load Options

Load EPS Data Select to *add* EPS data to your system. You must select either the Load EPS Data check box or the Delete EPS Data check box.

EPS Code Type Select the EPS code type that you want to load. Only EPS code types that you defined on the Ext Org Code Type Table page are available for selection.

Input File Enter the drive, directory, and filename path where the EPS market code external data resides.

EPS Data Delete Options

Delete EPS Data Select if you want to *delete* EPS data. You might perform this action, for example, if you wanted to remove the previous year's version of the EPS data.

All Select to remove all EPS data.

Specific Type and **EPS Code Type** Select Specific Type to delete a specific EPS data type. Then choose an EPS Code Type.

Click the Run button to run the EPS External Load process at user-defined intervals. Process name is CCEPSLOD and process type is SQR Report.

Viewing EPS Load Results

This section discusses how to view the following data related to the EPS load process:

- Zip codes
- Market codes

- Error messages
- Suspense messages
- All messages

Pages Used to View EPS Load Results

Page Name	Object Name	Navigation	Usage
EPS Zip to Market Code	EPS_ZIP_MRKT_TABLE	Campus Community, Organization, Define Organization Data, EPS Zip to Market Code	View the zip code that is related to the market code. After running the EPS Load External Data process, the EPS data is populated into the EPS Zip to Market Code table.
EPS Market Code Table	EPS_MRKT_CD_TABLE	Campus Community, Organization, Define Organization Data, EPS Market Code Table	View or update the EPS market codes that you loaded through the load process.
EPS Suspense Data	EPS_SUSP_DATA	Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Data	View any error messages that may result from the EPS load process.
EPS Suspense Message	EPS_SUSP_MESSAGE	Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Message	View the EPS suspense error messages.
EPS Messages	EPS_MESSAGE_TABLE	Campus Community, Organization, Organization Data Load, EPS Messages	View all of the messages generated by the EPS External Load process.

Viewing EPS Zip Codes Loaded through the Load Process

Access the EPS Zip to MarketCode page.

EPS Zip to Market Code page

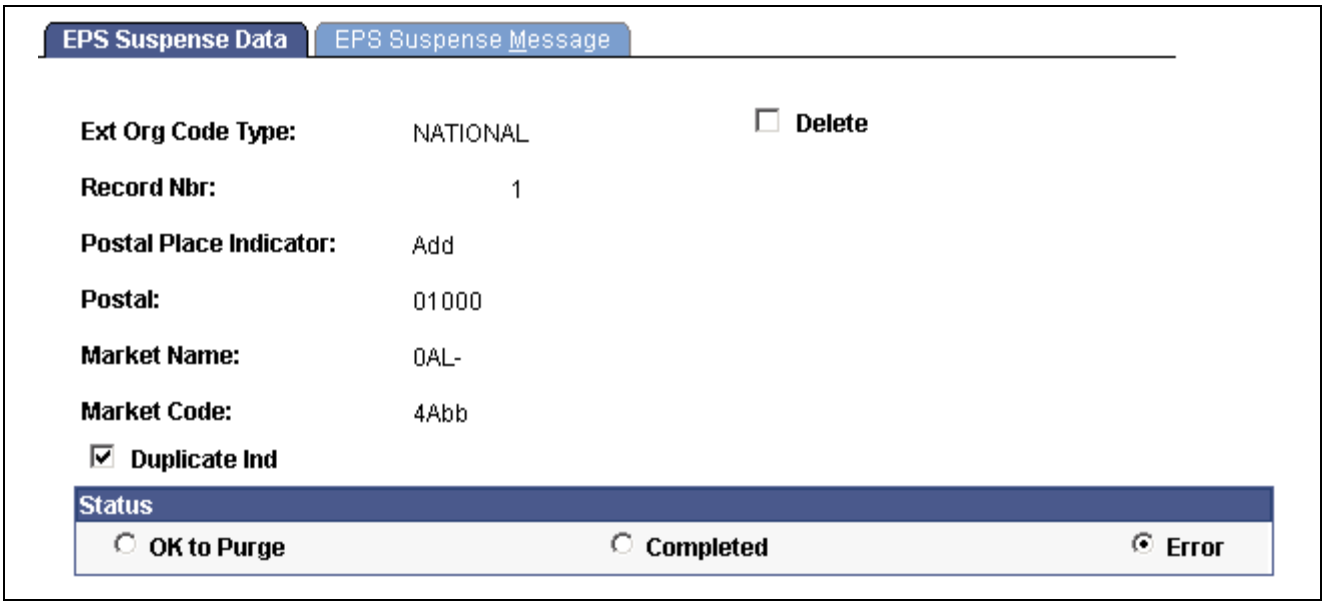
Market codes can be linked to many external organization code types. You can view market code descriptions on the EPS Market Code Table page.

Viewing EPS Market Codes Loaded through the Load Process

Access the EPS Market Code Table page.

Viewing EPS Load Process Error Messages

Access the EPS Suspense Data page.



EPS Suspense Data page

Delete Select to mark this suspense record for deletion. The system deletes the record when you run the EPS Purge Suspense File process.

Duplicate Ind (duplicate indicator) The load process selects this check box when it finds a duplicate postal code, market name, and market code within the code type.

Status

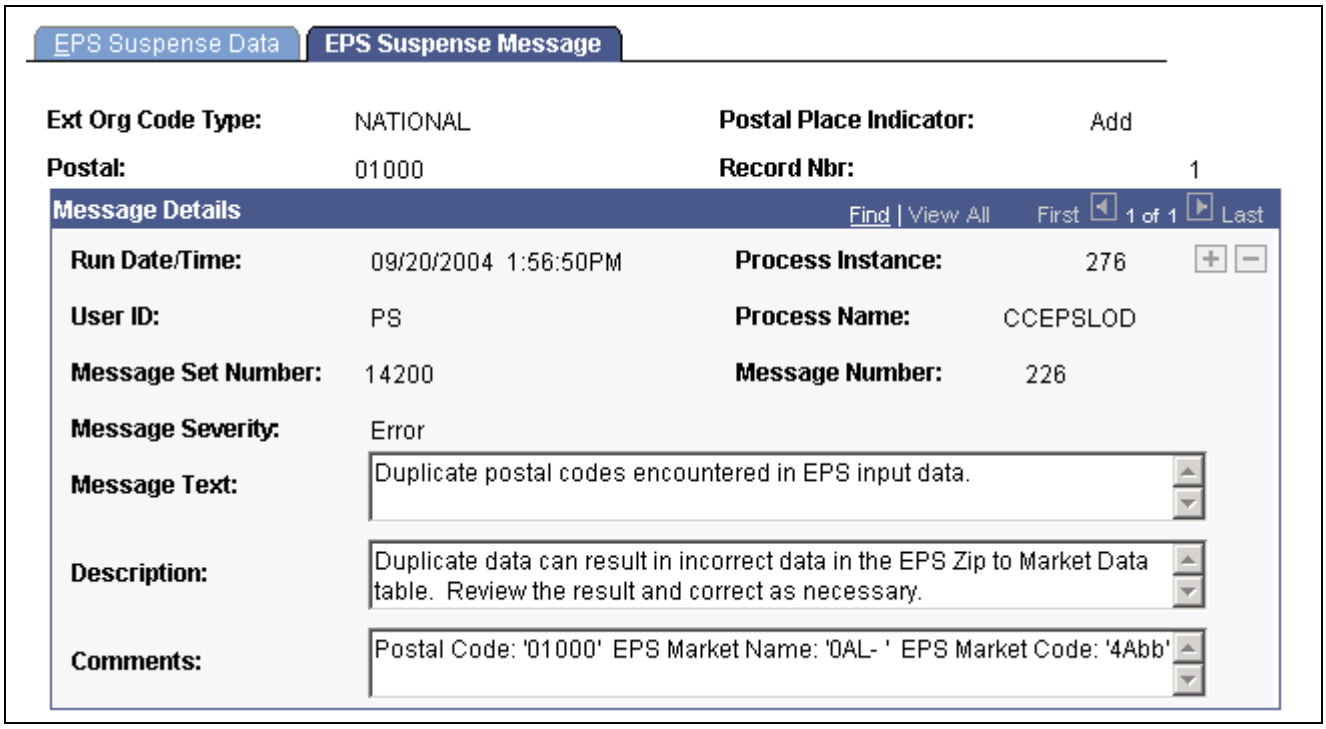
OK to Purge Select to mark the record for purge. When you run the EPS Purge Suspense File process the process purges this record.

Completed The load process selects this option when the record has been successfully updated.

Error The load process selects this option when it encounters an error, such as a duplicate. The system indicates duplicates by selecting the Duplicate Ind check box. If you encounter a duplicate record, you can decide whether to delete the record by selecting the Delete check box, or whether to ignore the duplication by clearing the Duplicate Ind check box.

Viewing EPS Suspense Messages

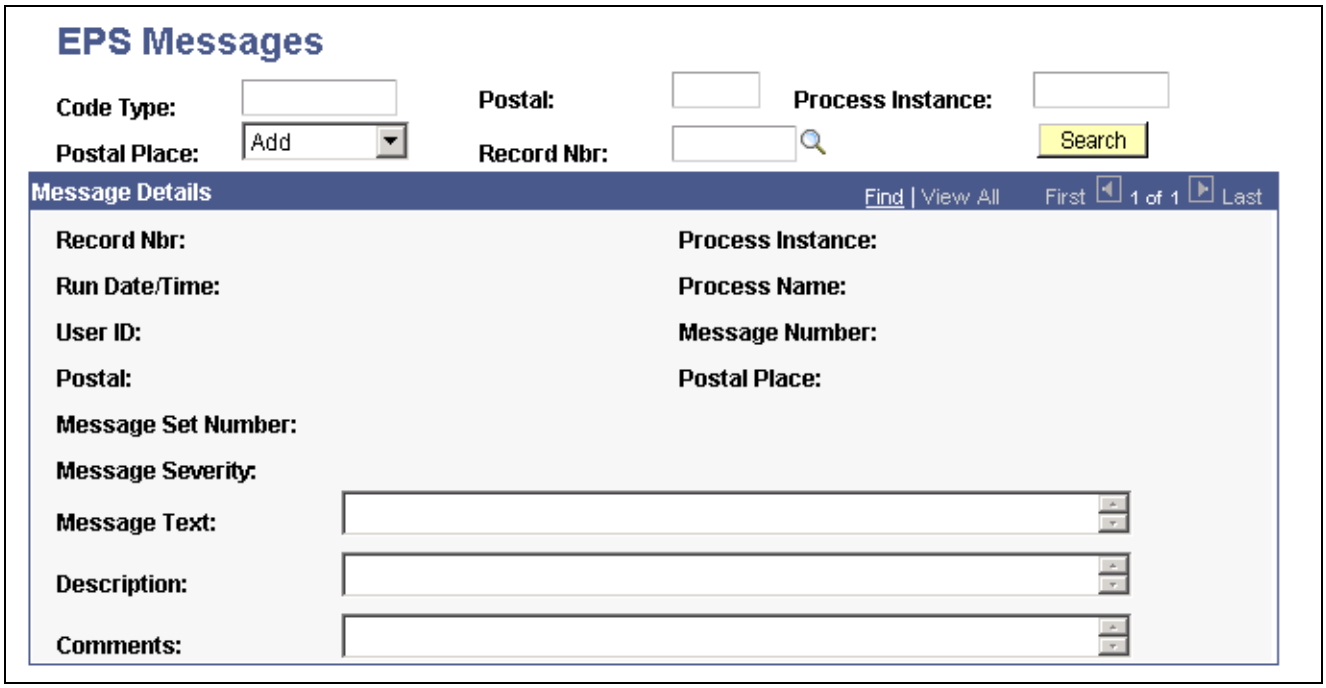
Access the EPS Suspense Message page.



EPS Suspense Message page

Viewing All Messages Generated from Loading EPS Market Codes

Access the EPS Messages page.



EPS Messages page

Code Type, Postal, Process Instance, Postal Place, and **Record Nbr** (record number) — Use these fields to narrow the selection of messages that you want to display.

Search — Click to display the messages based on your search.

Assigning EPS Market Codes to an Organization

This section tells you how to:

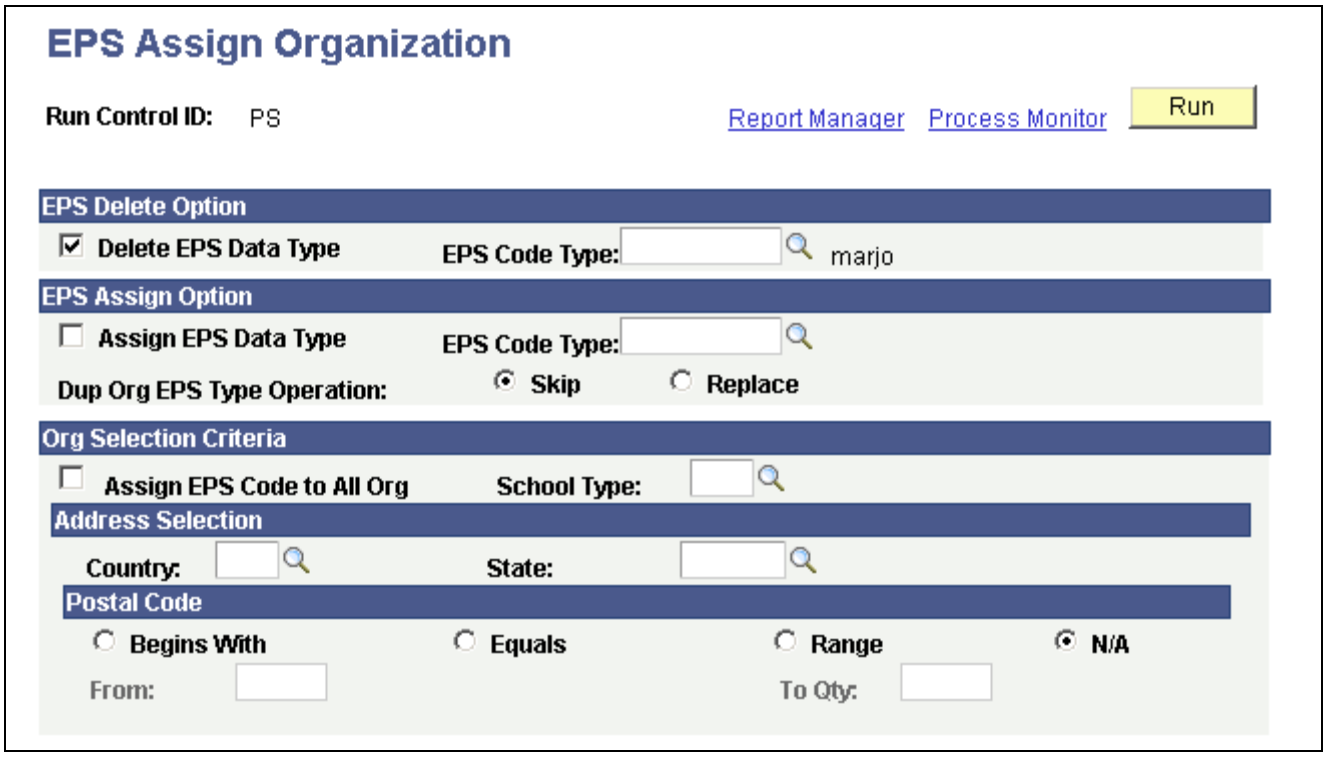
- Assign market codes.
- View and maintain the organization external codes.

Pages Used to Assign EPS Market Codes to an Organization

Page Name	Object Name	Navigation	Usage
EPS Assign Organization	EPS_ASGN_ORG_PARMS	Campus Community, Organization, Organization Data Load, EPS Assign Organization	Assign EPS market codes to external organizations.
External Organization Codes	EXT_ORG_CODES	Campus Community, Create/Maintain Organizations, External Organization Codes, External Organization Codes	Display the results of the automated EPS assignment process for a specific external organization. You can also use this page to maintain the EPS market code data for the institution.

Assigning Market Codes

Access the EPS Assign Organization page.



EPS Assign Organization page

EPS Delete Option

Delete EPS Data Type and**EPS Code Type** — Select Delete EPS Data Type to delete EPS data. Select the EPS code type to delete. Use this action, for example, to remove a prior year's version of the EPS data.

EPS Assign Options

Assign EPS Data Type and**EPS Code Type** — SelectAssign EPS Data Type to assign EPS data to organizations. Select the EPS code type to assign.

Skip — Select if you *do not* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Replace — Select if you *do* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Org Selection Criteria

Assign EPS Code to All Org (assign enrollment planning service code to all organizations) — Select to assign EPS market codes to all external organizations. If you select this check box, the School Type field and the fields in the Address Selection group box become unavailable for input.

School Type — Select the school type to which you want to assign EPS market codes. If you want to select organizations by using the address fields below, do not select the Assign EPS Code to All Org check box. Instead, select a school type (such as *Secondary*).

Address Selection

Use this group box to assign EPS market codes to organizations based on address criteria.

Country and **State** Select the country and state to select external organizations.

Postal Code

Use this group box if you want to select external organizations from a certain postal code or postal code range. Select the appropriate option depending on how you want to select by postal code. Select one option only.

Begins With Select to choose an organization by a beginning postal code. Enter the beginning postal code in the From field.

For example, suppose that one organization has had a 5-digit postal code entered (90068) and one organization has a 9-digit version of the postal code entered (90068-6328). Using a postal code that begins with 90068 will find both organizations.

Equals Select to choose an organization by a specific postal code. Enter the postal code in the From field.

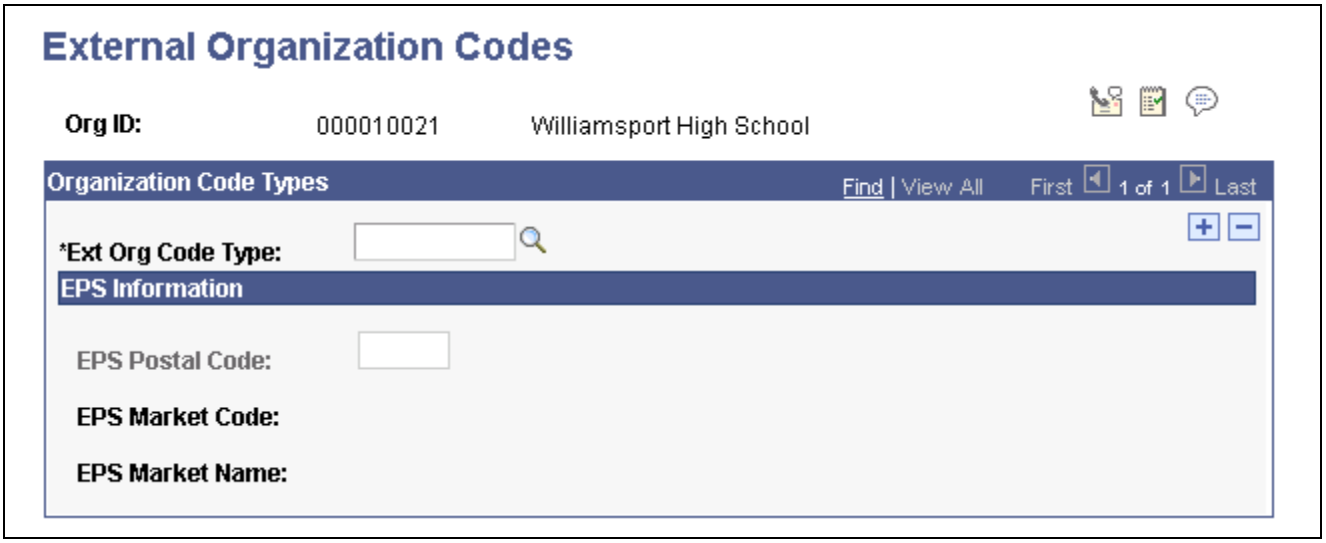
Range Select to choose an organization by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.

N/A Select if you do not want to use postal codes in your selection criteria for the organization. This is the default setting.

Click the Run button to run the EPS Assign Organization process at user-defined intervals.

Viewing and Maintaining the Organization External Codes

Access the External Organization Codes page.



External Organization Codes page

Ext Org Code Type (external organization code type) — Select the external organization code type. If this external organization code type is an EPS code type, then the EPS Postal Code field becomes available for selection (if the external organization code type is not an EPS code type, then the EPS Postal Code field displays but you cannot edit or change this field).

EPS Postal Code — Select the EPS postal code. You can change this field no matter what the assignment process did.

EPS Market Code and **EPS Market Name** — After you select an EPS postal code, the system displays the EPS Market Code and EPS Market Name from the setup tables. This data cannot be changed on this page.

Printing and Purging EPS Market Codes

This section discusses how to:

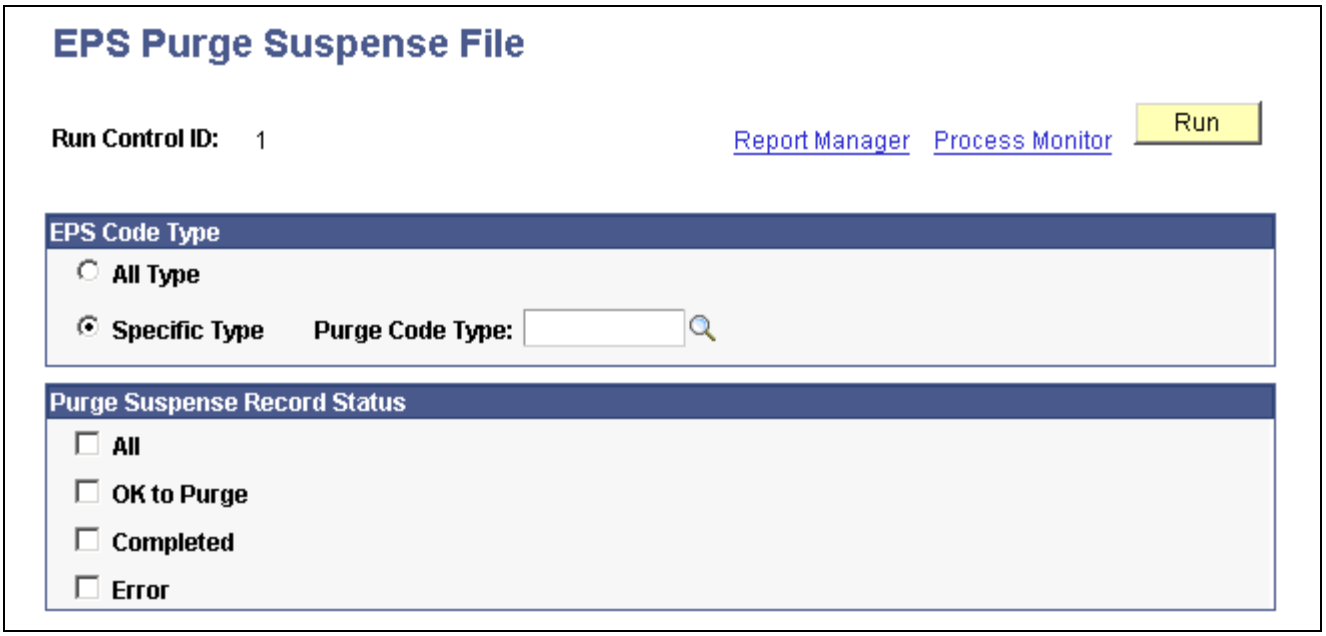
- Print EPS market codes.
- Purge EPS market codes.

Page Used to Purge EPS Market Codes

Page Name	Object Name	Navigation	Usage
EPS Purge Suspense File	EPS_PURGE_PARMS	Campus Community, Organization, EPS Purge Suspense File	Purge EPS code records from the suspense file. You can purge all EPS codes or a specific type.

Purging EPS Suspense Files

Access the EPS Purge Suspense File page.



EPS Purge Suspense File page

EPS Code Type

Use this group box to select the EPS market code records that you want to purge from the suspense file.

All Type	Select to purge all EPS market code type records from the suspense file.
Specific Type and **Purge Code Type**	Select to purge only a specific EPS market code type record from the suspense file. Use Purge Code Type to choose an EPS market type.

Purge Suspense Record Status

Use this group box to select the type of messages that you want to remove. You must choose at least one.

All	Select to remove all suspense records, regardless of their status.
OK to Purge	Select to remove all suspense records with a status of *OK to Purge.*
Completed	Select to remove all suspense records with a status of *Completed.*
Error	Select to remove all suspense records with a status of *Error.*

Click the Run button to run the EPS Purge Program process at user-defined intervals.

CHAPTER 30

Deleting Prospect and Applicant Information

This chapter provides an overview of deleting prospect and applicant information and discusses how to:

- Delete a prospect record.
- Delete an application.

Understanding the Prospect and Application Delete Feature

This section lists common elements and provides an overview of the Prospect and Application Delete feature.

Use the Prospect and Application Delete feature if you added a prospect or an applicant to the system in error and you want to quickly delete the prospect's record, application, and associated 3C information. This feature consists of two Structured Query Report (SQR) processes: the Prospect Delete process (ADPRSDEL) and the Application Delete process (ADAPPDEL).

You can use these processes to delete *all* academic career information for a prospect or applicant or to delete information for a *specific* academic career, when the prospect or applicant has multiple careers entered into the system. In either case, the processes delete prospect or applicant data from every table in the database in which the data resides. You cannot delete 3C information without also deleting the academic career for the person.

Important! The prospect and application delete processes are designed strictly as clean-up tools. They are *not* to be used as a person delete—an ID Delete function already exists in PeopleSoft Campus Community to accomplish that task. Also, they are not to be used for mass purge and archive functions.

Understanding How the Prospect and Application Delete Feature Relates to ID Delete

To understand how the Prospect Delete and Application Delete processes work, you need to understand how these processes relate to the ID delete process.

Although the Prospect Delete and Application Delete processes remove prospect records and applications from the tables in your database, the identification number and personal data for the prospect or applicant still remain in the system. If you need to delete this information, use the ID Delete feature.

The ID Delete feature, because of its primary obligation to maintain referential integrity, searches for the presence of critical data elements on critical high-level tables prior to deleting individual identification numbers.

If the ID Delete feature finds no data for the identification number in these critical control tables, it proceeds with the deletion. However, if the feature does find data for the identification number, it cancels the deletion and displays a message of explanation.

The Prospect Delete and Application Delete processes prepare records for ID Delete when:

- No other prospect record or application exists.

- No student record exists for a matriculated applicant or active student.
- No student financials record exists.

When you create prospect records and applications, the system writes a corresponding row to the STDNT_CAREER table for each career of the prospect or applicant. The STDNT_CAREER table is one of the control tables that the ID Delete process searches prior to deleting an identification number. To ensure that you can delete an identification number after deleting a corresponding prospect record or application, the Prospect Delete and Application Delete processes check for critical data elements to determine if the identification number for the prospect or applicant meets certain conditions. If the identification number meets those conditions, the processes delete the identification number from the STDNT_CAREER table, and the identification number becomes eligible for ID delete—provided that it meets all the requirements of the ID Delete feature.

Likewise, when your institution processes application fees and enrollment deposits, the system writes a corresponding row to the ITEM_SF table, which flows up to the ACCOUNT_SF table (one of the four control tables in the ID Delete feature). On the ITEM_SF table, the Applicant Delete process changes the Application Number Deleted field from the default *No* to *Yes*.

The Prospect Delete and Application Delete processes remove data from the ID Delete control tables only if the data came from PeopleSoft Recruiting and Admissions processes, not data that originated from other applications in PeopleSoft Campus Solutions.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing IDs," Deleting Individual IDs

Common Elements Used in This Chapter

All Careers	Select this option to delete all academic careers for the prospect or applicant.
Career	If you selected the Specific Careers option, this check box is available for entry. Select to delete a specific career for a prospect or delete an application for a career for an applicant.
Comm (communications), **Chkl** (checklists), and **Cmts** (comments)	If you selected the Specific Careers option, select the appropriate check box to delete communications, checklists, and comments.
Communications, Checklists, and **Comments**	Select the appropriate check boxes to delete any associated communications, checklists, or comments that are assigned to the prospect with the administration function PROS or PROP (for prospects) or ADMA or ADMP (for applicants) for the specified careers.
No Career Delete	Select this option to delete *no* prospect record for the prospect or applicant.
Specific Careers	Select this option to delete specific careers, if the prospect has more than one prospect record or the applicant has more than one application. When you select this option, the Career check box in the Specific Career(s) Delete Options group box becomes available for entry.
UnDelete	Select this check box to undelete a specific career.

Deleting a Prospect Record

This section lists prerequisites and discusses how to:

- Select the prospect records to delete.
- View the prospect delete holding table.
- Run the Prospect Delete process.

You can delete a prospect record for all careers or for a specific career. Specify the prospect information that you want to delete on the Prospect Delete page for each prospect record. Then run the Prospect Delete process *once* to delete all prospect records from the delete holding table. This process deletes the main structure data for the prospect, and (at your option) the 3C information (communications, checklists, and comments). You can also undelete a prospect record from the holding file, if you have not yet run the Prospect Delete process.

Prerequisites

Use the Prospect Program Data page to delete the application number from the prospect record. Delete the application number for this prospect in the Application Nbr (application number) field.

The system creates an application number automatically when you add an application. This is based on your installation table option settings.

Note. If the prospect record that you want to delete *also* has an application for the same academic career, you must first delete the application number from the prospect record. If the prospect record that you want to delete does *not* have an application for the same academic career, just delete the prospect record.

Remember to save the page. If you forget to delete the application number, the system provides a reminder message when you try to select a prospect for deletion.

If the prospect is an applicant or matriculated within the same academic career, you can still run the Prospect Delete process. However, the prospect does not qualify for subsequent ID delete because the prospect still has relations with the institution as an applicant or student.

See Also

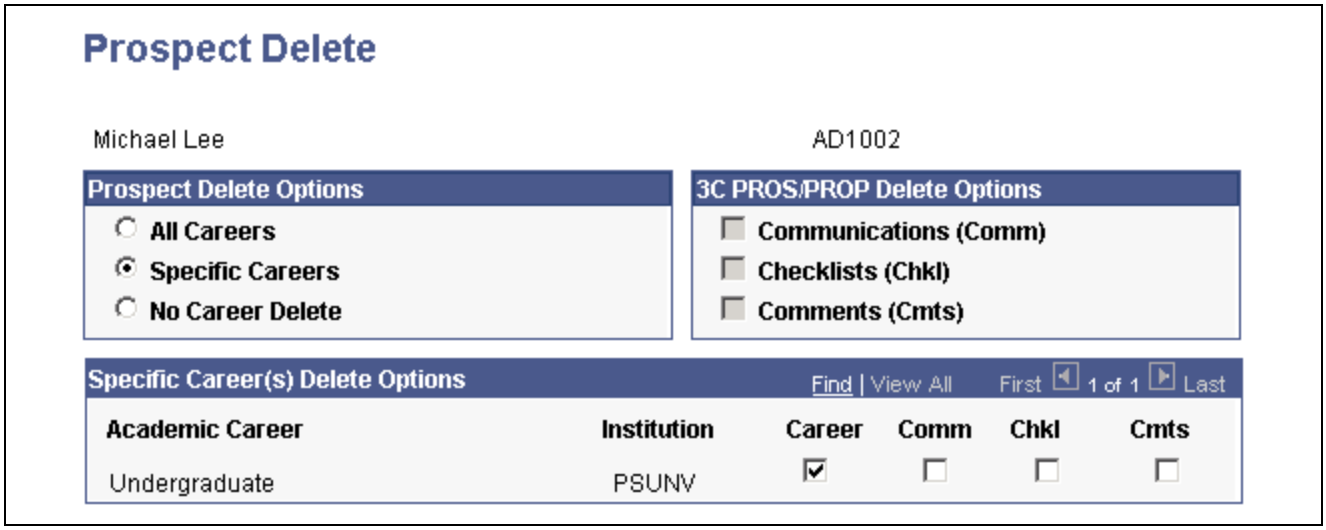
Chapter 9, “Recruiting Prospective Students,” Adding Prospects Through the Create/Update Prospects Component, page 88

Pages Used to Delete a Prospect Record

Page Name	Object Name	Navigation	Usage
Prospect Delete	ADM_PRS_DELETE	Student Recruiting, Delete Prospects, Delete Prospect Record	Select prospect records for deletion.
Prospect Delete Holding	ADM_PRS_DEL_SUSP	Student Recruiting, Delete Prospects, Prospect Delete Holding	Review the prospects that you marked for deletion on the Prospect Delete page, removing records from the table that were marked for deletion in error.
Prospect Delete Parms (prospect delete parameters)	ADM_PRSP_DEL_PARMS	Student Recruiting, Delete Prospects, Prospect Delete Process	Run the Prospect Delete process.

Selecting Prospect Records to Delete

Access the Prospect Delete page.



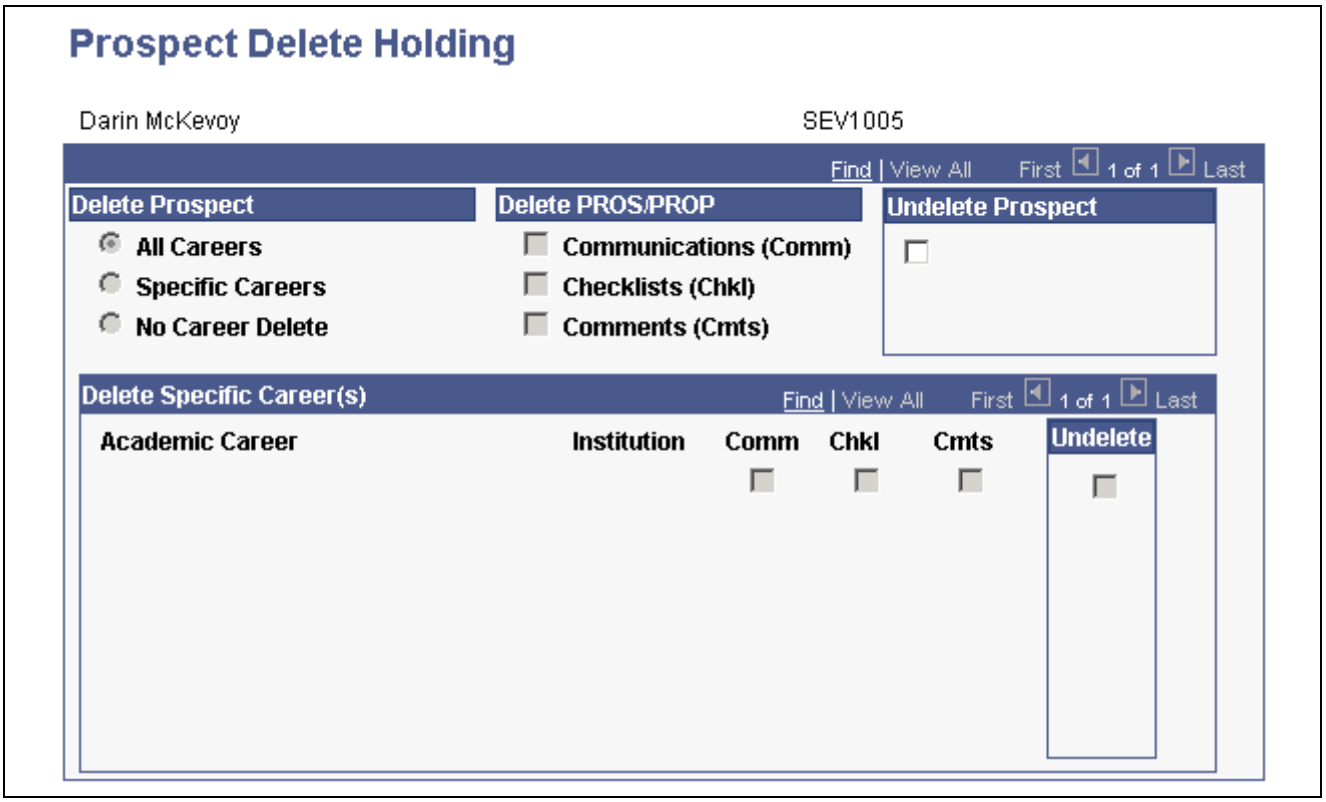
Prospect Delete page

The 3C PROS/PROP Delete Options group box refers to 3C entries that have the PROS, PROP, or PSSV administrative function for prospects *and* for which the variable data in the 3C record matches the career information that you requested to be deleted.

When you save the page, the prospect's identification number goes into a prospect delete holding table. You can then reenter the Prospect Delete page for any additional prospects that you want to delete. Run the Prospect Delete process only once to delete the prospect records that you entered in the holding table.

Viewing the Prospect Delete Holding Table

Access the Prospect Delete Holding page.



Prospect Delete Holding page

Before running the Prospect Delete process, review the prospects that you selected for deletion. You can undelete any records that you erroneously marked for deletion.

Undelete Prospect Select to undelete *all* careers.

Undelete Select to undelete a specific career.

When you save the page, the system removes the prospect records for the academic careers that you selected from the delete holding table. These prospect records will not be deleted.

Running the Prospect Delete Process

Access the Prospect Delete Parms page.

Click Run to run the Prospect Delete process (ADPRSDEL) which deletes the prospect records that you marked for deletion in the holding table.

Technical Information

To prepare records for the optional ID Delete process, the Prospect Delete process analyzes whether data should be deleted from the STDNT_CAREER table as follows:

- The process evaluates the ADM_APPL_DATA table for each prospect, searching for an application record in the academic career corresponding to the prospect record.
  - If the process finds an application, then it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as an applicant, with the academic institution. The prospect does not qualify for ID Delete.
  - If the process does not find an application, then it evaluates the ACAD_PROG table.

- The process evaluates the ACAD_PROG table for each prospect, searching for a student record in the academic career and academic program corresponding to the prospect record.
  - If the process finds a student record, it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as a student, with the academic institution. The prospect does not qualify for ID delete.
  - If the process does not find a student record, it deletes the row containing the prospect's EMPLID and ACAD_CAREER from the STDNT_CAREER table. The prospect meets both conditions and *might* qualify for ID delete.

Deleting an Application

This section lists prerequisites and discusses how to:

- Select the applications to delete.
- View the applicant delete holding table.
- Run the Application Delete process.

You can delete an application for all careers or for specific careers. Specify the applicant information that you want to delete on the Applicant Delete page for each application. Then run the Application Delete process *once* to delete all the applications that you entered in the applicant delete holding table. This process deletes the main structure data for that applicant and (at your option) the 3C information (communications, checklists, and comments). You can also undelete an application from the holding file, if you have not yet run the Application Delete process.

Prerequisites

Before you can delete an application that was put into the system by mistake:

1. Select Records and Enrollment, Career and Program Information, Student Program/Plan.
2. On the Student Program page, make sure that the applicant is not an active student in the academic career corresponding to the application.

   If the applicant has matriculated, delete the student records for the academic career and academic program corresponding to the application. Scroll to find and delete *only* the rows that correspond to the same academic career and academic program as the current application.

   If the applicant matriculated in multiple academic programs in the same academic career, and one of them is valid, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID delete because the applicant still has a relationship, as a student, in another academic program within the institution.
3. Select Student Admissions, Application Maintenance, Maintain Applications, Application Program Data.
4. On the Application Program Data page, determine whether the applicant has another application in the same academic career corresponding to this application, but in a different academic program.

   If the applicant has another application in the academic career, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID delete because the applicant still has a relationship, as an applicant, in another academic program within the institution.
5. Select Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect Program Data.

6. On the Prospect Program Data page, determine whether the prospect record has an application number; if the prospect record has an application number, delete it from the record.

   If you forget to perform this step, the system reminds you to do so when you try to select an application for deletion.

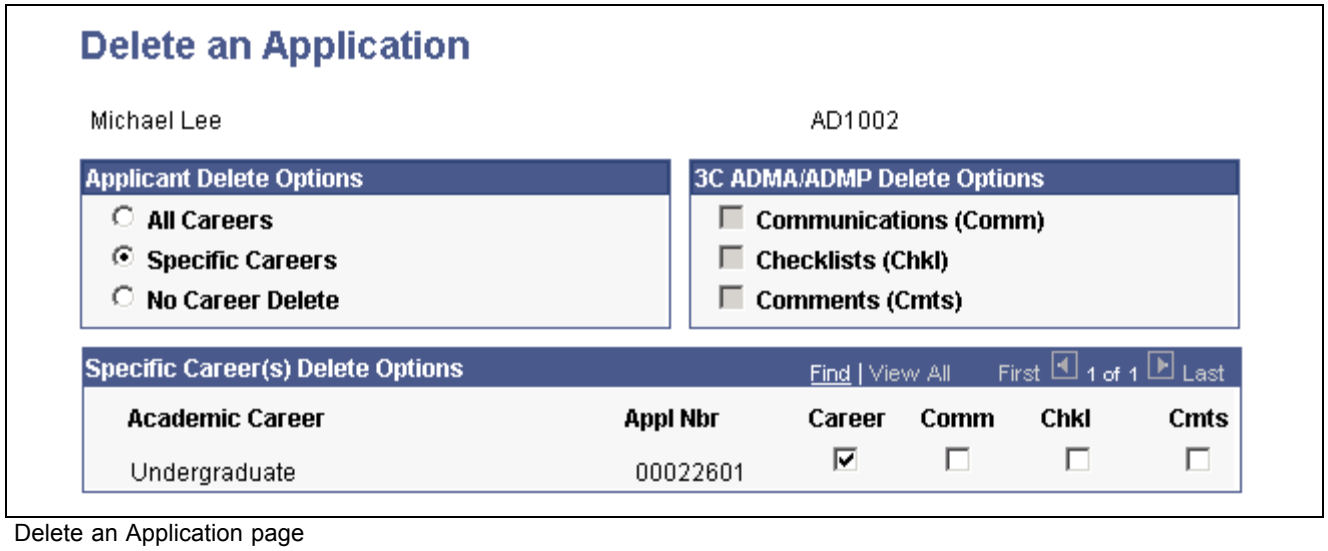
Note. The application number is created automatically if you add an application based on your setup on the Installation - AD page. Also, if the prospect record exists for the applicant, the applicant's identification number is not eligible for ID Delete because the applicant has a relationship, as a prospect, with the institution.

Pages Used to Delete an Application

Page Name	Object Name	Navigation	Usage
Delete an Application	ADM_APP_DELETE	Student Admissions, Application Delete, Delete an Application	Select applications to delete.
Application Delete Holding	ADM_APP_DEL_SUSP	Student Admissions, Application Delete, Application Delete Holding	Remove records from the application delete holding table that were erroneously marked for deletion.
Application Delete Process	ADM_APPL_DEL_PARMS	Student Admissions, Application Delete, Application Delete Process	Run the Application Delete process.

Selecting Applications to Delete

Access the Delete an Application page.



Delete an Application page

The 3C ADMA/ADMP Delete Options group box refers to 3C entries that have the ADMA or ADMP administrative functions for applicants, *and* that match the career information that you requested to be deleted.

Note. There can be more than one application for each academic career.

When you save the page, the applicant's identification number goes into an applicant delete holding table. You can then reenter the Applicant Delete page for any additional applicants that you want to delete. Run the Application Delete process once to delete all the applicants in the holding table.

Viewing the Applicant Delete Holding Table

Access the Application Delete Holding page.

Undelete Applicant Select to undelete *all* academic careers.

When you save the page, the system removes the applications for the academic careers that you select from the delete holding table. These applications will not be deleted.

Running the Application Delete Process

Access the Application Delete Process page.

Click Run to run the Application Delete process (ADAPPDEL).

Technical Information

To prepare records for the optional ID Delete process, the Application Delete process analyzes whether data should be deleted from ID Delete control tables:

- The process evaluates the ACAD_PROG table for each applicant, searching for a student record in the academic career corresponding to the application.
  - If the process finds a student record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a student, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find a student record, then it evaluates the ADM_APPL_PROG table.
- The process evaluates the ADM_APPL_PROG table for each applicant, searching for another application in the academic career corresponding to the application record.
  - If the process finds another application, it does not delete the row containing the applicant's Identification number from the STDNT_CAREER table because the applicant still has a relationship, as an applicant, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find an application, then it evaluates the ADM_PRSPCT_CAR table.
- The process evaluates the ADM_PRSPCT_CAR table for each applicant, searching for a prospect record in the academic career corresponding to the application record.
  - If the process finds a prospect record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a prospect, with the academic institution. Therefore, the applicant does not qualify for ID delete.
  - If the process does not find a prospect record, it deletes the row containing the applicant's EMPLID, ACAD_CAREER, and CAR_REQ_TERM from the STDNT_CAREER table.
- The process updates the Application Number Deleted field on the ITEM_SF table from the default N to Y.
- The ITEM_SF table flows up into the ACCOUNT_SF table.

CHAPTER 31

Producing a Year to Year Comparison Report

This chapter discusses how to run the Admissions Funnel Report process to produce a year-to-year demographic comparison report.

Running the Admissions Funnel Report Process

This section discusses how to create an admissions funnel report.

PeopleSoft delivers an admissions funnel report that you can use to report on your prospect and applicant numbers across one or multiple terms. You can run this report in multiple formats showing varied data, depending on your criteria. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, academic program and so forth. You can also choose to include a comparison of terms on this report. The report calculates numeric and percentile representations of these comparisons.

Page Used to Run the Admissions Funnel Report Process

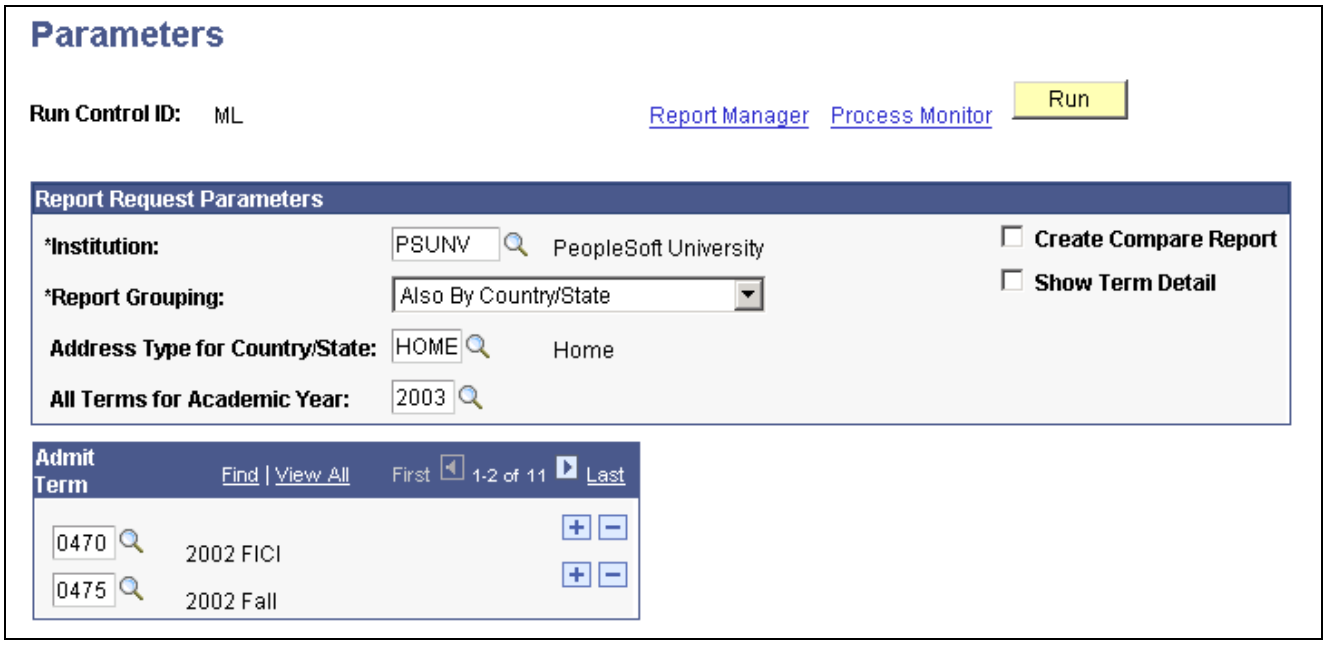
Page Name	Object Name	Navigation	Usage
Admissions Funnel Report - Parameters	RUNCTL_ADFUNNEL	Student Admissions, Reports, Admissions Funnel Report, Parameters	Run a demographic funnel report.

See Also

Appendix A, "PeopleSoft Recruiting and Admissions Reports," PeopleSoft Recruiting and Admissions Reports: A-Z, page 509

Running Admissions Funnel Reports

Access the Admissions Funnel Report - Parameters page.



Admissions Funnel Report - Parameters page

Define the data that you want to appear in your report in the Report Request Parameters section.

Report Grouping Group the data on your report. The default is to have the report grouped by at least the application type and status *(Only by Application Type, Status)*. However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select *Also by Application Method,* then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. The delivered values are *Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region,* and *Also by State.*

Create Compare Report Select if you want to compare terms on this report. After this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.

Regulatory Region Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of 'Also by Ethnicity' is selected.

Show Term Detail Select if you want to see the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you prefer to see your data in one group.

Address Type for Country/State This field appears when you select *Also By Country/State* in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.

All Terms for Academic Year Select the year for which you want to run the report. After you select an academic year, the admit terms defined for that year automatically appear. You

can remove any of the terms that you do not want to see. You must select a year for the Admissions Funnel Report process to run successfully.

All Terms in Comparison Year If you are running a comparison report, select the year to which you are comparing.

Admit Term The system populates the admit terms based on the year you selected in the All Terms for Academic Year. You can add and delete the admit terms if you want. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.

Comparison Admit Term After you select a comparison year, the admit terms defined for that year automatically populate these fields. You can remove any of the terms you do not want to see.

APPENDIX A

PeopleSoft Recruiting and Admissions Reports

This appendix provides an overview of PeopleSoft Recruiting and Admissions reports and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PeopleSoft Recruiting and Admissions Reports: A-Z

This table lists the PeopleSoft Recruiting and Admissions reports, sorted alphanumerically by report ID. The reports listed are Crystal and SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
ADAVGCUT Average Cutoff Report	Enables you to assess an evaluated applicant pool to determine the admissions averages that drive certain program actions. (SQR)	Student Admissions, Reports, Average Cutoff Report	RUNCTL_ADAVGCUT
ADFUNNEL Admissions Funnel	Lists prospect and applicant numbers across one or multiple terms. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, academic program and so forth. (SQR)	Student Admissions, Reports, Admissions Funnel Report	RUNCTL_ADFUNNEL
AD701 Admissions Action Table	Lists all program actions defined on the Program Action Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Admissions Action Table	PRCSRUNCNTL_AD_RC in the RUN_AD701 component

Report ID and Report Name	Description	Navigation	Run Control Page
AD702 Test Table	Lists all of the tests defined on the Test Tables page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Test Scores, Test Tables	PRCSRUNCNTL_AD_RC page in the RUN_AD702 component
AD703 Recruiting Category Table	Lists all recruiting categories defined on the Recruiting Category Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Recruiting, Recruiting Category Table	PRCSRUNCNTL_AD_RC page in the RUN_AD703 component
AD704 Referral Source Table	Lists all GPA types defined on the Referral Sources Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Prospects, Referral Source Table	PRCSRUNCNTL_AD_RC page in the RUN_AD704 component
AD705 Region Table	Lists all regions defined on the Region Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Recruiting, Region Table	PRCSRUNCNTL_AD_RC page in the RUN_AD705 component
AD710 Summary Type Table	Lists all summary types defined on the External Summary Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, External Summary Type Tbl	PRCSRUNCNTL_AD_RC page in the RUN_AD710 component
AD711 Admit Type Table	Lists all admit types defined on the Admit Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Admit Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD711 component
AD712 Application Center Table	Lists all recruiting categories defined on the Application Center Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Application Center Table	PRCSRUNCNTL_AD_RC page in the RUN_AD712 component
AD713 Admission Evaluation Table	Lists all evaluation codes defined on the Evaluation Codes Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Table	PRCSRUNCNTL_AD_RC page in the RUN_AD713 component
AD714 Evaluation Committee Table	Lists all evaluation committees defined on the Evaluation Committee Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Committee Table	PRCSRUNCNTL_AD_RC page in the RUN_AD714 component
AD715 Evaluation Status Table	Lists all evaluation statuses defined on the Evaluation Status Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Status Table	PRCSRUNCNTL_AD_RC page in the RUN_AD715 component

Report ID and Report Name	Description	Navigation	Run Control Page
AD716 GPA Type Table	Lists all GPA types defined on the GPA Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, GPA Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD716 component
AD717 GPA Rules Tables	Lists all GPA conversion rules defined on the GPA Rules Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, GPA Rules Table	PRCSRUNCNTL_AD_RC page in the RUN_AD717 component
AD718 Material Group Table	Lists all material groups defined on the Material Group Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Material Group Table	PRCSRUNCNTL_AD_RC page in the RUN_AD718 component
AD719 Rating Scheme Table	Lists all rating schemes defined on the Rating Scheme Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Rating Scheme Table	PRCSRUNCNTL_AD_RC page in the RUN_AD719 component
AD721 Recruiting Center Table	Lists all recruiting centers defined on the Recruiting Center Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Prospects, Recruiting Center Table	PRCSRUNCNTL_AD_RC page in the RUN_AD721 component
AD724 Rating Scheme Component Table	Lists all rating components defined on the Rating Comp Def Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Rating Component Table	PRCSRUNCNTL_AD_RC page in the RUN_AD724 component
AD726 Program Action Reason Table	Lists all program action reasons defined on the Program Action Reasons Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Program Action Reason Table	PRCSRUNCNTL_AD_RC page in the RUN_AD726 component
AD727 Material Type Table	Lists all material types and their variable data. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Material Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD727 component
AD728 School Type Table	Lists all GPA types defined on the School Types Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, School Type Table	PRCSRUNCNTL_AD_RC page in the RUN_AD728 component
AD729 Test Component Table	Lists all of the test components defined on the Test Components Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Test Scores, Test Component Table	PRCSRUNCNTL_AD_RC page in the RUN_AD729 component

Report ID and Report Name	Description	Navigation	Run Control Page
AD730 Target Cohort Table	Lists all enrollment management target cohort levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Cohort	PRCSRUNCNTL_AD_RC page in the RUN_AD730 component
AD731 Target Division Table	Lists all enrollment management target population levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Division	PRCSRUNCNTL_AD_RC page in the RUN_AD731 component
AD732 Target Population Table	Lists all enrollment management target division levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Population	PRCSRUNCNTL_AD_RC page in the RUN_AD732 component
CC720 Postal Code Table	Lists all postal codes defined on the Region Postal Code Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Recruiting, Region Postal Table	PRCSRUNCNTL_AD_RC page in the RUN_CC720 component

PeopleSoft Recruiting and Admissions Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed. The reports are listed alphanumerically by report ID.

ADAVGCUT

Institution Enter the institution name.

Academic Program Enter the academic program for which you want to generate an average cutoff report.

Admit Term Enter the admit term for which you want to generate an average cutoff report.

Running the process creates a file called adavgcut.lis. Use this file to view the output.

Note. If you enter an academic program and admit term combination that is not set up in the Average Cutoff Table page, you receive a blank report.

ADFUNNEL

Define the data that you want to appear in your report in the Report Request Parameters section.

Report Grouping Group the data on your report. The default is to have the report grouped by at least the application type and status *(Only by Application Type, Status)*.

However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select *Also by Application Method,* then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. The delivered values are *Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region,* and *Also by State.*

Create Compare Report Select if you want to compare terms on this report. After this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.

Regulatory Region Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of 'Also by Ethnicity' is selected.

Show Term Detail Select if you want to see the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you prefer to see your data in one group.

Address Type for Country/State This field appears when you select *Also By Country/State* in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.

All Terms for Academic Year Select the year for which you want to run the report. After you select an academic year, the admit terms defined for that year automatically appear. You can remove any of the terms that you do not want to see. You must select a year for the Admissions Funnel Report process to run successfully.

All Terms in Comparison Year If you are running a comparison report, select the year to which you are comparing.

Admit Term The system populates the admit terms based on the year you selected in the All Terms for Academic Year. You can add and delete the admit terms if you want. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.

Comparison Admit Term After you select a comparison year, the admit terms defined for that year automatically populate these fields. You can remove any of the terms you do not want to see.

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group

A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag

Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag

Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data

In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object

In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction

In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

Acad Interests Selection Crit page 108, 113
Acad Status page 256
Academic Data Detail page 140
academic interests 119
Academic Interests Map component (SAD_ACAD_MAP) 53
Academic Interests Map page 56
Academic Interests page 118, 119
academic programs, creating alternate offers 451
Academic Selection Crit page 108, 111
Academic Subject Detail page 140, 155
Academic Subjects Summary page 155, 156
Academic Summary page 154, 156
academic test information, viewing for prospects and applicants 123
Academic Test Summary page 123
Academics page 282, 285, 302, 307
accounts, viewing a summary 124
ACT, *See* external tests, loading
Action/Reason Entry page 465
Activate Application page 409, 411
Activities page 257, 282, 302, 308
  EDI TS189 269
ADA, *See* external tests, loading
ADA Country Codes component (ADA_COUNTRY_TBL) 47
ADA Country Table page 48
ADA_COUNTRY_TBL component 47
additional candidate information 301
Additional Data page 304
additional documentation xxvi
Additional Information page 284
Address Information page 146, 360
Address page 255, 257
Addresses page
  EDI TS130 229
ADM TS130 Post Parm 2 page 245, 248
ADM TS130 Post Parm page 245, 246
ADM_ACTION_TABLE component 83
ADM_APPLCTR_TBL component 7
ADM_RECRCTR_TBL component 7
ADM_WEB_PRS_SETUP component 39
Admission Action component (ADM_ACTION_TABLE) 83
admission comments
  available fields for letter generation 210
Admission Comments page 212
Admission Evaluation Table report 510
Admission Installation Defaults, Setting up 21
ADMISSION_COMMENTS component 210
admissions
  setting up admit types 25
  setting up installation defaults 21
Admissions Action Table page 84
Admissions Action Table report 509
Admissions Average Cutoff report 447
admissions average cutoff reports 447
admissions averages
  calculating 433
  correcting errors 442
  defining evaluation codes for 434
  defining rating components for 434
  defining rating schemes for 434
  evaluating applicants based on 441
  example 440
  updating for financial aid and student records 444
  viewing 442
admissions averages SQC
  setting up rules for 435
Admissions Comments component (ADMISSION_COMMENTS) 210
Admissions Comments page 211
Admissions Comments Table page 211
Admissions Funnel report 509
Admissions Funnel Report - Parameters page 505
Admit Type component (ADMIT_TYPE_TABLE) 25
Admit Type Table page 25
Admit Type Table report 510
ADMIT_TYPE_TABLE component 25
All EPS Messages page 490

ALT_OFFER_TABLE component 451
Alternate Average Calculations component (PROG_AVG_CALC_DEFN) 435
Alternate Avg Calc Messages 441, 442
Alternate Offer component (ALT_OFFER_TABLE) 451
Alternate Offer Table page 452
Alternate Program Addition page 453
alternate program offers
assigning 453
creating 451
example 455
understanding 451
AMCAS, *See* external tests, loading
AMCAS Credit Hour Codes component (AMCAS_CR_HR_CODE) 47
AMCAS Credit Hours Codes page 49
AMCAS GPA Codes component (AMCAS_GPA_CODE) 47
AMCAS GPA Codes page 49
AMCAS_CR_HR_CODE component 47
AMCAS_GPA_CODE component 47
AP, *See* external tests, loading
AP Subject Test Codes component (AP_SUBJECT_CODES) 47
AP Subject Test Codes page 48
AP_SUBJECT_CODES component 47
App Degree page 255, 262
App Entry/Qstns page 255, 263
Applicant Data page 283, 303
applicant delete process
running 504
Applicant Delete Process page 504
Applicant Progression page 419
applicants
3C's 97, 185
deleting 497
entering or updating bio/demo data 174
evaluating 377
evaluating using automatic processing 401
linking
materials to an application 147
selecting for alternate offers 452
setting up to evaluate 73
tracking
electronic addresses 120
extracurricular activities 120
general materials 145
honors and awards 120
languages 120
names 120
other information 117
publications 120
relations with your institution 121
relationships 121
residency data 121
student group involvement 121
supporting information 117
test results 122
work experience 121
viewing
academic test summary information 123
account summary 124
assigned to a recruiter 163
by organization 159
event and meeting summary information 124
groups 124, 159
summary application materials information 154
summary of progression 418
Applicants by Category - Application Status page 44
Applicants by Category - Program Detail page 44
Applicants by Category - Search Results page 44
Applicants by Category - Select Search Criteria page 43
Applicants by Category page 164, 165
Applicants by Organization – Search Results page 44
Applicants by Organization - Select Search Criteria page 44
Applicants by Organization page 160, 162
Applicants by Region - Search Results page 44
Applicants by Region - Select Search Criteria page 44
Applicants by Region page 164, 168
Application Center component (ADM_APPLCTR_TBL) 7
Application Center Table page 8, 13
Application Center Table report 510
Application Course Detail page 155
Application Data page 173, 179, 203, 255
Application Data Parms page 197, 199

Application Delete Holding page 503, 504
Application Delete Process page 503
Application Detail page 206
Application Evaluation page 391, 392
application evaluation summaries, viewing 413
application evaluations, creating 389
Application Evaluator Detail page 397, 398
Application Evaluator Rating page 397
Application Fee Calc Messages page 206
Application Fees (Batch) page 206
Application Fees page 173, 181
application fundamentals xxv
Application Items page 174, 182
Application Materials Extract page 405
application materials extract, running 441
Application Materials page 147, 152
Application page 303
Application Program Data page 172, 175, 203
Application Program Parms page 197, 198
Application Program Update page 468
Application Recruit Parms page 197, 200
Application School/Recruiting page 174, 182, 203
Application Status Update page 409, 410
application status update process, running 444
Application Student Response page 203, 204
Application Summary Detail page 155
Application Summary page 206
applications
  adding
    a program to an existing application 205
    and updating 171
    manually 171
    with quick admit 186
  automatically updating multiple applications statuses 408
  calculating fees in batch 206
  deleting 497, 502
  linking materials to applications in batch 405
  loading from external test score data 195
  setting up
    application processing centers 13
    data parameters 199
    program parameters 198
    recruiting parameters 200
  updating 202
  updating program actions and statuses 459
  updating program actions and statuses with a background process 467
  viewing evaluation summaries and progression 413
  viewing summary information 205
Assign Alternate Eval Codes page 452
Assignment Crit page 108, 114
Attendee Events page 89, 96
Attendee Meetings page 89, 96
automatic processing
  to evaluate applicants 401
Average Cutoff component (AVERAGE_CUTOFF_TBL) 447
Average Cutoff Report 509
Average Cutoff Report page 448
Average Cutoff Table page 448
AVERAGE_CUTOFF_TBL component 447
Avgs for Fin Aid and Records page 445
Awards page 284, 304
awards, setting up 29

B

basis of admission
  available fields for letter generation 207
  recording 207
  recording comments and conditions 210
Basis of Admission component (BASIS_ADMIT_TABLE) 207
Basis of Admission page 208
Basis of Admission setup page 208
Basis of Admission Setup page 208
BASIS_ADMIT_TABLE component 207
Batch Application Fees page 206
Bio/Demo 2 page 254
Bio/Demo data page
  EDI TS130 230
Bio/Demo Data page 359
Bio/Demo page 254
Biographical Details page 89

C

Calculate Deposit Fees page 178
Calculate Deposits page 409, 411
Calculate Enrollment Targets page 476
Canadian Data page 127, 134
Candidate Data page 285, 305
careers, setting up parameters 41
CBAP
  loading 369
  posting 373
  processing 353
  purging 371
  understanding 353
CBAP Load page 369
CBAP parameters
  setting up 357
CBAP Post Parameters page 373
CBAP process 353
CBAP Purge page 372
CBAP Search Parameters page 373
CBAP Setup Parameters page 358
CBAP suspension table
  maintaining 359
CEGEP Program Table page 68
checklists
  entering for applicants 97, 185
  viewing summary 214
cohort 469
Colleges page 283, 303
Comment Category Table page 69, 71
comments
  entering for applicants 97, 185
  viewing summary 214
comments, submitting xxx
Committee Rating page 391, 394
Committee Results page 414, 415
common elements xxxi
communications
  entering for applicants 97, 185
  viewing summary 214
Communications page 255, 257
contact information xxx
Contact Information page 160, 162
Contact Location Information page 160
Contact Phone Information page 160
Copy Target Detail page 482
Course Summary page 155, 157
Courses page 256, 283, 303
coursework and agreement information
  maintaining 421
Create Applicants from Tests page 197
Create Applicants From Tests page 197
Create OWO Contracts page 428
Create Prospects from Query page 103, 104
Create Prospects from Tests page 100
cross-references xxix
CRS, *See* external tests, loading
CRS Major Codes component (CRS_MAJOR_CODE) 47
CRS Major Codes page 48
CRS_MAJOR_CODE component 47
Cum GPA page 256
  EDI TS189 264
Currency Conversion page 174
Customer Accounts page 124
Customer Connection website xxvi

D

DAT, *See* external tests, loading
Delete an Application page 503
Deposit Fees (entry) page 173
Deposit Fees page 173
details of the OWO contract, reviewing 427
division 469
documentation
  printed xxvi
  related xxvi
  updates xxvi

E

EDI applications and transcripts
  receiving 215
EDI applications and transcripts, receiving 251
EDI data, loading for application transactions 252
EDI Message Purge page 250
EDI messages, purging 250
EDI staging files, processing and posting 244
EDI transactions, understanding 216
EDI TS130
  posting external data 244
  purging the staging table 248
  reviewing
    addresses 229

names 229
reviewing RAP (requirements, attributes, and proficiencies) 231
setting up search/match/post parameters 244
staging
academic status data 234
academic summary data 237
activity data 234
additional information 240
bio/demo data 230
bio/demo data (2) 231
course data 237
degree data 239
message data 242
organization demographic data 233
organization process options 226
previous college(s) 232
process options 224
RAP data 231
reviewing and editing pages 221
session data 236
test score data 235
EDI TS130 Acad Status page 223, 234
EDI TS130 Academic Summary page 223, 237
EDI TS130 Activities page 223, 234
EDI TS130 Additional Info page 224, 240
EDI TS130 Addresses page 222
EDI TS130 Bio/Demo (2) page 222, 231
EDI TS130 Bio/Demo page 222
EDI TS130 Courses page 224, 237
EDI TS130 Degrees page 224, 239
EDI TS130 Load Parameters page 219
EDI TS130 Messages page 224, 242
EDI TS130 Names page 222
EDI TS130 Org Data page 223, 233
EDI TS130 Org Process Options page 222, 226
EDI TS130 Org Search page 243
EDI TS130 Previous College(s) page EDI TS130 232
EDI TS130 Previous Colleges page 223
EDI TS130 Process Options page 222 EDI TS130 224
EDI TS130 Purge Parms page 249
EDI TS130 RAP page 222, 231
EDI TS130 Sessions page 223, 236
EDI TS130 Test Scores page 223, 235
EDI TS189
processing and posting application data 270
purging records 272
EDI TS189 application data
searching for matching organization data 270
EDI TS189 Load Parms page 253
EDI TS189 Org Search page 270
EDI TS189 Purge Parms page 272
education
entering and updating external data 125
entering and updating external subject information 132
entering and updating external summary information 130
entering external data 128
education information
applicants 125, 139
prospects 139
Education page 283, 302
educational agreements
creating 421
reviewing and updating 424
electronic addresses for applicants 120
Electronic Addresses page 120
Electronic Data Interchange (EDI) 215, 251
Employment page 256, 265
enrollment management targets
displaying 480
examples 470
processing 475
reporting 483
setting up 473
understanding 469
using cohort, population, division 469
using templates 482
Enrollment Planning Service*, See* EPS
Enrollment Target Cohort component (TARGET_COH_TABLE) 473
Enrollment Target Cohort page 474, 484
Enrollment Target Division component (TARGET_DIV_TABLE) 473
Enrollment Target Division page 484
Enrollment Target page 476, 477, 480
Enrollment Target Population (TARGET_POP_TABLE) 473
Enrollment Target Population page 484

Enrollment Target Summary page 476, 480
enrollment, managing 469
EOS, *See* external tests, loading
EPS
  assigning market codes 485
  assigning market codes to an organization 491
  loading market codes 486
  printing and purging 494
  running the external load process 486
  setting up code types for organizations 485
  understanding market codes 485
  viewing load results 487
EPS Assign Organization page 491
EPS Assign Organization Parms page 491
EPS Load External Data page 486
EPS Market Code Table page 488, 489
EPS Messages page 488
EPS Purge Suspense File page 494
EPS Suspense Data page 488, 489
EPS Suspense Message page 488, 489
EPS Zip to Market Code page 488
EPS Zip to Market Table page 488
ESIS data, entering and updating 134
Ethnicity Map page 51
Ethnicity Mapping component (SAD_ETHNIC_MAP) 47
evaluating applicants 377
  admissions averages 441
  understanding the business process 377
Evaluation Calculation page 406, 441
Evaluation Code Assignment page 404
evaluation codes
  alternate 451
  assigning with a background process 402
  defining 78
Evaluation Committee Table page 75, 79
Evaluation Committee Table report 510
evaluation committees, defining 79
EVALUATION component 73
Evaluation component (EVALUATION) 73
Evaluation page 172
evaluation status codes, defining 80
Evaluation Status component (EVALUATION_STATUS) 73
Evaluation Status Table page 75, 80
Evaluation Status Table report 510
Evaluation Table page 74, 78
EVALUATION_STATUS component 73
evaluations
  application 389
  entering and updating evaluator ratings 387
  general 381
  processing automatically 401
  viewing summaries and progression 413
evaluator application ratings 396
Evaluator Detail page 414, 417
Evaluator Rating page 391, 395
Evaluator Results page 414, 416
events, viewing summary information 124
EXT_SUMM_TYPE_TBL component 31
External Academic Summary page 126, 130, 140, 141
External Course Defaults page 128, 138
External Course Detail page 141
External Course Summary page 141, 143
external courses and admissions averages
  example 440
External Courses page 128, 136
external data
  entering ESIS data 134
  posting 294
  reviewing setup tables 47
External Data page 126, 128
External Degree Summary page 140, 142
External Degrees page 127, 135
External GPA Rules component (GPA_RULES_TBL) 31
External GPA Rules Table page 32
External GPA Type component (GPA_TYPE_TABLE) 31
External GPA Type Table page 32
External Organization Code Type page 486
External Organization Codes page 491, 493
External Subject Detail page 127, 133
External Subject Summary page 140, 142
External Subjects page 127, 132
External Summary Type component (EXT_SUMM_TYPE_TBL) 31
External Summary Type Table page 31

External Test Score Load 277
External Test Score Load page 277
External Test Score Mapping component (SAD_TEST_SETUP) 52
External Test Score Mapping page 52
External Test Score Purge page 300
external test scores
processing 275
external tests
correcting and editing the suspense record 280
defining 46
defining external test components 45
loading 277
purging suspense files 299
reviewing
additional data 301
candidate information 301
personal information 290
student profile section 301
test score data 292
test score suspense data 286
setting up test score loads 45
viewing test score messages 310
EXTRA_ACTIVITY_TBL component 27
extracurricular activities
setting up 27
tracking for prospects and applicants 120
Extracurricular Activities component (EXTRA_ACTIVITY_TBL) 27
Extracurricular Activities page 120
Extracurricular Activity Map component (SAD_EXTRA_MAP) 53
Extracurricular Activity Map page 56
Extracurricular Activity page 57
Extracurricular Activity Table page 28

F

financial contribution information
maintaining 423
funnel report 505

G

General Evaluation Committee page 382, 384
General Evaluation page 382
general evaluations, creating 381
General Evaluator Detail page 387, 388
General Evaluator Rating page 387
General Evaluators page 382, 385
General Materials page 146, 149
General Materials Summary page 147, 151
General Selection Crit page 108
general text appendixes, adding 427
generating letters 207
getting started 1
glossary 515
GMASS, *See* external tests, loading
GMAT, *See* external tests, loading
GMAT Country codes component (SAD_GMT_CNTRY_TBL) 47
GMAT Country Codes page 51
GPA Rules Tables report 511
GPA rules, setting up 32
GPA tables
setting up 31
GPA type codes, defining 32
GPA Type Table page 32
GPA Type Table report 511
GPA/Hours page 284, 303
GPA_RULES_TBL component 31
GPA_TYPE_TABLE component 31
GRE, *See* external tests, loading
GRE Subject Test Codes component (GRE_SUBJECT_CODES) 47
GRE Subject Test Codes page 48
GRE_SUBJECT_CODES page 47
groups, viewing for prospects and applicants 159

H

Honors and Awards component (SA_HONORS_AWARDS) 29
Honors and Awards page 120
honors and awards, tracking for prospects and applicants 120
honors, setting up 29
Honors/Awards Table page 29

I

Immunizations page 256, 266
Inbound EC Agent page 219
Installation Defaults - AD component (INSTALLATION_AD) 21
Installation Defaults - AD page 21

INSTALLATION_AD component 21
institutions, setting up parameters 41
Interests page 283, 302, 308
Interviewer Detail page 154

L

Languages page 120, 255, 258
languages, tracking for prospects and applicants 120
LAW, *See* external tests, loading
Learner Services 38
letter generation 207
LS_SCHL_TYPE_TABLE component 26

M

mass change
  assigning evaluation codes to applications 402
  updating program actions and statuses 467
Mass Change Definition page 468
Mass Change Group page 468
Material Group component (MATL_GRP_TYP_TBL) 33
Material Group Table page 34, 36
Material Group Table report 511
material groups, setting up 36
Material Type component (MATERIAL_TYPES) 33
Material Type Field Usage page 34, 35
Material Type Table page 34
Material Type Table report 511
material types, viewing 34
MATERIAL_TYPES component 33
materials
  defining groups 33
  viewing types 33
Materials Extract Detail page 74, 76
Materials Summary page 154, 155
MATL_GRP_TYP_TBL component 33
meetings, viewing summary information 124
Messages page 257, 360
MMA Partners xxvi

N

Name page
  EDI TS130 229
Names page 254
names, tracking for prospects and applicants 120
New Target Detail page 482
notes xxix

O

Ontario Universities Application Center, *See* OUAC
Org Data page 256
Org Process Options page 254
Organization Affiliation page 69, 71
Organization Detail page 255
Organization Groups page 124
Organization Primary Location page 43, 126, 160
Organization School Info page 126
Organization School Information page 160
Organization Search Process
  using organization search process 243
organization search, processing 243
Organization Table page 69
Other text appendixes page 427
Other Text Appendixes page 425
OUAC 313
  loading data through EDI 314
  loading data through SQR 315
  posting transaction data 344
  pre-loading data 314
  receiving external applications 313
  reviewing overflow application information 349
  setting up
    EDI Manager 61
    law categories 67
    organizations 68
    receiving transactions 61
    teaching subjects 68
  viewing messages 348
  viewing processing statuses 343
OUAC A1/U1 page 316
OUAC A2/U2 page 316, 317
OUAC A3/U3 page 316, 317
OUAC A4/U4 page 316, 317
OUAC A5/U5 page 316, 318
OUAC A6/U6 page 316, 318
OUAC A7/U7 page 316, 319
OUAC A8/U8 page 316, 319
OUAC A9/U9 page 316, 320

OUAC Appl Law Cat page 350, 351
OUAC Application Data page 350
OUAC AR page 316, 320
OUAC B1/V1 page 323
OUAC B2 page 323, 324
OUAC B5 page 321
OUAC B7/V7 page 323, 324
OUAC B8/V8 page 323, 325
OUAC B9/V9 page 323, 325
OUAC C1 page 323, 325
OUAC C2 page 323, 326
OUAC D1 page 323, 326
OUAC E1 page 323, 327
OUAC F1 page 328
OUAC F2 page 328
OUAC F3 page 328, 329
OUAC G1/H1 page 330
OUAC G2/H2 page 330, 331
OUAC G3/H3 page 330, 331
OUAC G4/H4 page 330, 331
OUAC G5/H5 page 330, 332
OUAC G6/H6 page 330, 332
OUAC G7/H7 page 330, 333
OUAC G8/H8 page 330, 333
OUAC J/K page 334
OUAC J1/K1 page 334, 335
OUAC J2/K2 page 334, 335
OUAC J3/K3 page 334, 336
OUAC J4/K4 page 334, 336
OUAC J5/K5 page 334, 337
OUAC L1/N1 page 334, 337
OUAC Law Application Data page 350
OUAC Law Categories page 68
OUAC Load page 315
OUAC M1 page 334, 337
OUAC M2 page 334, 338
OUAC Organization Data page 69, 70
OUAC PI page 339
OUAC Post Parms BC page 345, 347
OUAC Post Parms page 345
OUAC Post Parms2 page 345, 346
OUAC Pre Load Parms page 314
OUAC Process Message Table page 349
OUAC R/S page 339
OUAC R1/S1 page 339, 340
OUAC R2/S2 page 339, 340
OUAC R3/S3 page 339, 341
OUAC R4/S4 page 339, 341
OUAC Suspense page 343
OUAC T1 page 342
OUAC Teaching Subject component (OUAC_T_SUBJECTS) 68
OUAC Teaching Subject Table page 68
OUAC, reviewing transaction staging tables
  A/U 315
  B/V-E 322
  B5 321
  F 327
  G/H 330
  J-N 333
  P-R 338
  T 342
OUAC_T_SUBJECTS component 68
Outreach 42
Overall Rating page 391, 393, 442
Overall Results page 414
OWO Contract Summary page 425
OWO contract summary subpage 427
OWO contracts
  creating 428
  printing 430
OWO Course and Support Agreements page 422
OWO Setup Table 427
OWO Summary page 425
OWO Voluntary Contributions page 423

P

PeopleBooks
  ordering xxvi
PeopleCode, typographical conventions xxviii
PeopleSoft application fundamentals xxv
Person Event Summary page 124
Personal Information page 282, 290, 301, 305
population 469
Post Parameters 2 page 271
Post Parameters page 271
  EDI TS189 271
Postal Code Table report 512
prerequisites xxv
Prim Contact and Dept page 69
Primary Contact and Department page 70
Print OWO Contracts page 430
printed documentation xxvi
Prior Schools page 285, 304
Process Options page 254, 286
Processing page 359
Profile Data page 284

PROG_ACTION_TABLE component 83
PROG_AVG_CALC_DEFN component 435
Prog/Plan Selection Crit page 108, 112
PROG_RSN_TBL component 83
Program Action component (PROG_ACTION_TABLE) 83
Program Action Reason component (PROG_RSN_TBL) 83
Program Action Reason Table page 84, 85
Program Action Reason Table report 511
Program Action Table page 84
program actions
  setting up 83
  understanding 459
  updating for multiple applications 465
  updating for one application 465
  updating multiple applications with a background process 467
Program Addition page 203, 205
program average calculation
  example 437
Program Average Calculation page 435
Program Information 1 page 360
Program Information 2 page 360
program stack 190
program statuses
  automatically updating multiple applications 408
  setting up 83
  understanding 459
  updating for multiple applications 465
  updating for one application 465
  updating multiple applications with a background process 467
Program Summary page 160, 164
Prospect Career Data page 89
Prospect Delete Holding page 500
Prospect Delete page 500
Prospect Delete Parms page 500, 501
Prospect Names page 120
Prospect Program Data page 89, 91
Prospect Programs page 43, 106, 160, 164
Prospect Recruiters page 106
Prospect School/Recruiting page 89, 93
Prospect Summary page 106
prospects
  academic interests 119
  adding 88
  adding with quick admit 186
  assigning recruiters to on a mass basis 106
  deleting 497, 499
  enabling prospect career fields 39
  entering and updating
    academic career data 89
    academic program data 91
    regional data 89
    school and recruiting data 93
  entering and updating biographical details 89
  linking
    materials to an application 147
  recording event meeting information 96
  recruiting 87
  setting up 21
  tracking
    event attendance 96
    extracurricular activities 120
    general materials 145
    honors and awards 120
    languages 120
    names 120
    other information 117
    publications 120
    relations with your institution 121
    relationships 121
    residency data 121
    student group involvement 121
    supporting information 117
    test results 122
    work experience 121
  viewing
    academic test summary information 123
    account summary 124
    assigned to a recruiter 163
    by organization 159
    event and meeting summary information 124
    groups 124, 159
    information 106
    summary application materials information 154
Prospects by Category - Search Results page 43

Prospects by Category - Select Search Criteria page 43
Prospects by Category page 164
Prospects by Organization - Search Results page 43
Prospects by Organization - Select Search Criteria page 43
Prospects by Organization page 160
Prospects by Region – Select Search Criteria page 43
Prospects by Region - Search Results page 43
Prospects by Region page 164, 167
publications
tracking for prospects and applicants 120
Publications page 120

Q

quick admit 186
Quick Admit - Assignment Criteria page 189, 192
Quick Admit - Bio/Demo Data page 189
Quick Admit - Biographical Details page 189
Quick Admit - Program/Plan page 189, 190
Quick Admit - Regional page 189
Quick Admit - Selection Criteria page 189, 192
Quick Admit/Quick Enroll feature 186

R

Rating Comp Def Table page 73
Rating Comp Definition component (RATING_COMP_DEF) 73
Rating component (RATING_TABLES) 73
Rating Components Table page 74, 76
Rating Scheme Component Table report 511
Rating Scheme Table page 74, 75
Rating Scheme Table report 511
rating schemes
assigning components 76
defining 75
rating values, calculating automatically 406
RATING_COMP_DEF component 73
RATING_TABLES component 73
Recommendations page 285, 305
Recommender Detail page 149, 154
Recommender Information page 146, 151
Recommender page 147
Recommenders page 255, 258
RECRUIT_CAT_TABLE component 7
Recruiter Categories page 15, 16
Recruiter Centers page 15, 18, 19
Recruiter Programs page 15
Recruiter Regions page 15, 17
recruiters
assigning on a mass basis 106
assigning to recruiting categories 16
associating with recruiting and application centers 18
defining 14
designating 15
linking to geographic regions 17
linking with academic programs and academic plans 19
Recruiters page 15
recruiting categories
assigning on a mass basis 106
setting up 12
Recruiting Category component (RECRUIT_CAT_TABLE) 7
Recruiting Category Table page 8, 12
Recruiting Category Table report 510
Recruiting Center component (ADM_RECRCTR_TBL) 7
Recruiting Center Table page 8
Recruiting Center Table report 511
recruiting centers, setting up 12
recruiting structure, setting up 7
recruiting students 87
Ref Nmbrs page 255
Reference Number page 261
REFERL_SRCE_TABLE component 26
Referral Source component (REFERL_SRCE_TABLE) 26
Referral Source Table page 26
Referral Source Table report 510
referrals, setting up sources 26
region codes, setting up 8
Region component (REGION_TABLE) 7
Region Postal component (RGN_POSTAL_TABLE) 7
Region Postal Table page 8
Region SetID Effdt Update page 8, 11

Region SetID Effective Date Update component (RUN_AD505) 7
Region Table page 8
Region Table report 510
region trees
activating 11
setting up 9
REGION_TABLE component 7
Regional Data page 175
Regional page 89
regions, assigning on a mass basis 106
related documentation xxvi
Relations with Institution page 121
relations with your institution
tracking for prospects and applicants 121
Relationships page 121
relationships, tracking for prospects and applicants 121
Religion page 257, 268
Religious Preference Map component (SAD_REL_MAP) 53
Religious Preference Map page 56, 59
reports, list of 509
request admissions information 37
setting up 39
Residences page 255, 260
Residency Data page 121
residency data, tracking for prospects and applicants 121
RESP_RSN_TABLE component 80
Response Reason component (RESP_RSN_TABLE) 80
RGN_POSTAL_TABLE component 7
Run Mass Change page 468
RUN_AD505 component 7

S

SA_HONORS_AWARDS component 29
SA_TEST_COMP_TABLE component 45
SA_TEST_TABLE component 46
SAD_ACAD_MAP component 53
SAD_ETHNIC_MAP component 47
SAD_EXTRA_MAP component 53
SAD_GMT_CNTRY_TBL component 47
SAD_REL_MAP component 53
SAD_TEST_SETUP component 52
SAT, *See* external tests, loading
SAT I page 285
SAT II page 286
SAT II Test Codes component (SATII_TEST_CODES) 47
SAT II Test Codes page 50
SAT II Test Recentered Values component (SATII_TST_RECENTER) 47
SAT II Test Recentered Values page 50
SAT Math Recentered Values component (SAT_MATH_RECENTER) 47
SAT Math Recentered Values page 49
SAT Verbal Recentered Values component (SAT_VERBAL_RECENTR) 47
SAT Verbal Recentered Values page 50
SAT_MATH_RECENTER component 47
SAT_VERBAL_RECENTR component 47
SATII_TEST_CODES component 47
SATII_TST_RECENTER component 47
School Course Classification page 69, 71
School Data page 69, 71, 286, 305
School Type component (LS_SCHL_TYPE_TABLE) 26
School Type Table page 27
School Type Table report 511
school types
setting up 26
Schools page 284, 304
schools, viewing by groups for prospects and applicants 124
Search Parameters page 245, 298
Search Parms page 245, 345
search/match
performing 294
re-running 299
researching duplicate records 298
viewing processing statuses 343
Search/Match Parameters page
EDI TS189 271
Search/Match/Post Test Scores page 295
Select Academic Summary Data page 148
Select External Courses page 148
Select External Subject page 148
Select General Materials page 149, 153, 382, 384
Select Query page 100, 102, 104
Select Test Scores page 147
Select Transcripts page 149
selection method for an institution
determining 427

self-service
Outreach 42
setting up request information 39
setting up request information and using student recruiting 37
understanding 37
Sessions page 256
setting up
recruiting structure 7
SSS, *See* external tests, loading
Staging data
EDI TS 130 221
EDI TS 189 221
STDNT_GROUP_TABLE component 30
Student Data page 286, 305
Student Group component (STDNT_GROUP_TABLE) 30
student group involvement, tracking for prospects and applicants 121
Student Group Table page 31
Student Groups page 121
student groups, setting up 30
student profile section 301
student response
capturing 204
setting up 80
Student Response Reason Table page 81
Subject Information page 360
suggestions, submitting xxx
Summary Type Table report 510
summary types, setting up 31

T

Target Applicants page 476
Target Cohort Table report 512
Target Detail page 476, 479
Target Division Table page 474
Target Division Table report 512
Target Population Table page 474
Target Population Table report 512
TARGET_COH_TABLE component 473
TARGET_DIV_TABLE component 473
TARGET_POP_TABLE component 473
teaching subjects, setting up 68
templates, using with enrollment management 482
Tender Details page 173, 174
terms 515
Test component (SA_TEST_COMP_TABLE) 45
Test Component Table page 46
Test Component Table report 511
test components, associating with tests 46
Test Data page 304
Test Results page 118, 122
test results, tracking for prospects and applicants 122
Test Score Candidate Data page 302
test score data
loading applications from 195
selecting the data load 197
test score messages 299
Test Score Messages page 311
Test Score Messages Purge page 300
Test Score Summary page 154
Test Score Suspense Data page 281
test scores
understanding external 275
Test Scores page 255
Test Summary page 119
Test Table report 510
Test Tables component (SA_TEST_TABLE) 46
Test Tables page 46
Tests page 282, 292
TOEFL, *See* external tests, loading
Transcript Data page 140, 141, 155
transcript transactions, loading EDI data 219
transcripts business process 218
Transcripts Summary page 154
TS130 Course Detail page 224
TS189 staging
reviewing and editing staging pages 253
typographical conventions xxviii

V

View Assigned Materials page 382
visual cues xxix

W

warnings xxix
Web Prospect Create component (ADM_WEB_PRS_SETUP) 39
Web Prospect Setup 2 page 39, 41
Web Prospect Setup page 39
Work Experience page 121