PeopleSoft®

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook

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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 Campus Community Preface

This preface discusses:

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

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

PeopleSoft Products

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

PeopleSoft Enterprise Campus Solutions Application Fundamentals

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

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

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook

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 Campus Community

This chapter provides an overview Campus Community, and discusses:

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

Campus Community Overview

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

Campus Community Business Processes

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

See Chapter 2, "Designing Campus Community," page 5.

Note. For full implementation planning, you will also want to read all of the setup chapters in this PeopleBook, the PeopleSoft Enterprise Campus Solutions Fundamentals 8.9 PeopleBook, and take advantage of all PeopleSoft sources of information, including installation guides, table-loading sequences, data models, and business process maps.

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

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

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

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

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

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

- Managing Health Data:

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

- Managing Identification Data:

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

- Managing Participation Data:

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

- Managing IDs:

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

- Searching for Records and Using Search/Match:

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

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

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

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

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

- Managing Service Indicators:

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

- Managing Organization Data:

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

- Managing Committee Data:

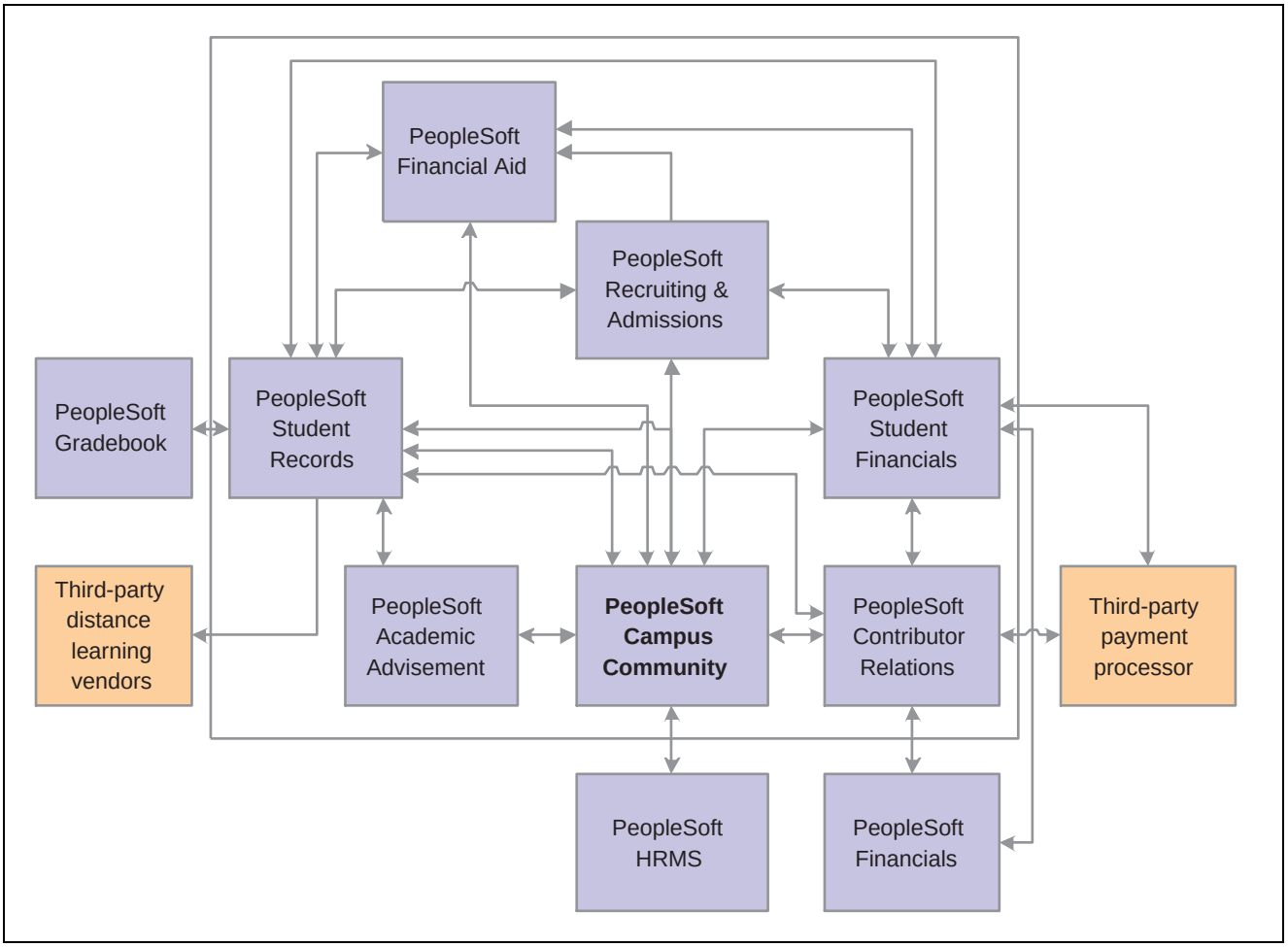
  Committee data enables you to assign members to committees and assign tasks to them.

- Managing Campus Event Planning:

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

Campus Community Integrations

Campus Community integrates with these PeopleSoft applications:



PeopleSoft Enterprise Campus Community integrations

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

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

Campus Community Implementation

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

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

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

Component	Component Interface	References
COMM_CATG_TBL	SCC_COMM_CATG_TBL	See Chapter 14, "Setting Up Communications," Defining Communication Categories, page 136.
COMM_CTXT_TBL	SCC_COMM_CTXT_TBL	See Chapter 14, "Setting Up Communications," Defining Communication Contexts, page 135.

CHAPTER 2

Designing Campus Community

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

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

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Reviewing Installation Setup and System Defaults"

Designing Campus Community

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

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

  Reviewing these settings can provide insight into some of the values that your system automatically displays or formats. For example, reviewing the ID settings in the Installation Table component (described in the *PeopleSoft Enterprise Campus Solutions 8.9 Fundamentals PeopleBook*) helps you identify where seed numbers are set for the automatic sequencing and assigning of ID numbers. Reviewing the country, state, and province codes (described in this chapter) ensures that the codes that your institution uses are available and that the standard address format that is set to appear for each, will serve your institution's needs.
- Set up name and address formats and identify types to manage individual names and addresses.
- Create usages to identify which types of names or addresses to use in specific circumstances.

- Review the National ID table to determine if the predefined national ID numbers, which PeopleSoft ships, include the identification numbers for the countries and formats that your institution requires.

  National ID numbers provide a method of identifying and tracking individuals. PeopleSoft ships national ID number formats predefined per country, including United States social security numbers (SSNs) and Canadian social insurance numbers (SINs).
- Establish salutations for use in communications with individuals in your system, set priority criteria to control the addition and deletion of records in your system, and specify the sets of data to use to detect duplicate or multiple records.
- Designate the types of information to control about individuals so that all departments in your institution can use the system to comply with government privacy regulations and any internal privacy policies.

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

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

See *Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, "Understanding Effective Dates"*

Reviewing or Defining Campus Community Installation Settings

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

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

- Review or define default installation settings for events, relationships, checklists, SEVIS, and national IDs.
- Review or define default installation settings for name and address types.

Prerequisites

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

See Also

Chapter 18, “Setting Up Campus Event Planning,” Defining Event Types, page 166

Chapter 2, “Designing Campus Community,” Establishing Salutations, page 22

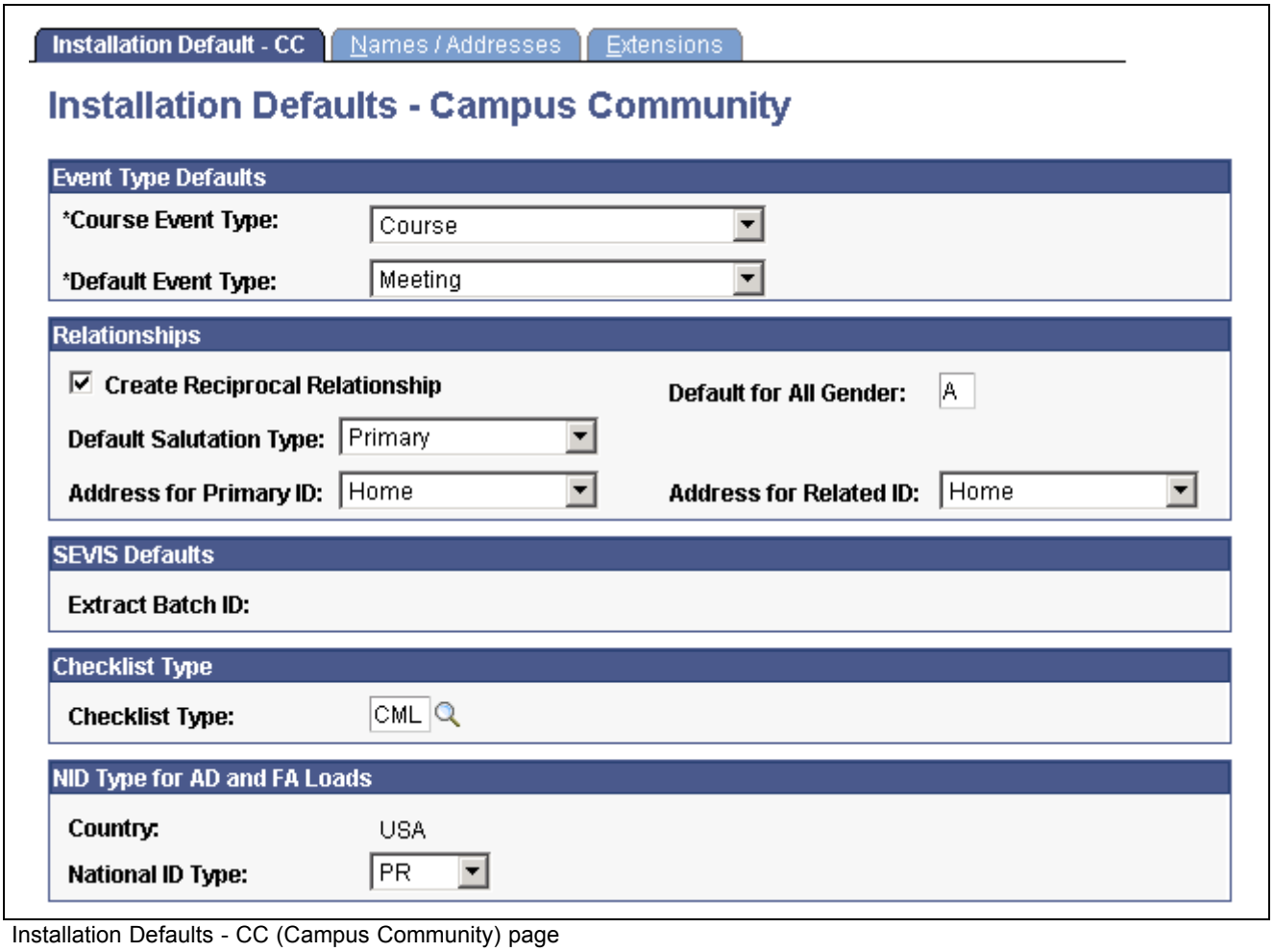
Chapter 22, “Managing Biographical Information,” page 209

Page Used to Review or Define Campus Community Installation Settings

Page Name	Object Name	Navigation	Usage
Installation Defaults - Campus Community	INSTALLATION_CC	Set Up SACR, Install, Campus Community Installation, Installation Default - CC	Review or define Campus Community default installation settings for events, relationships, checklists, SEVIS, and national IDs.
Names / Addresses	SCC_INSTALL_CC2	Set Up SACR, Install, Campus Community Installation, Names / Addresses	Review or define Campus Community default installation settings for names and addresses.

Review or Define Default Installation Settings for Events, Relationships, Checklists, SEVIS, and National IDs

Access the Installation Defaults - CC (Campus Community) page.



Installation Defaults - CC (Campus Community) page

Event Type Defaults

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

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

Default Event Type The default value is *Meeting.*

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

Relationships

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

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

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

Default for All Gender The default value is *A*(all). Do *not* change this value.

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

Default Salutation Type The default value is *Primary.*

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

Address for Primary ID The default value is *Home.*

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

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

Address for Related ID The default value is *Home.*

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

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

SEVIS Defaults

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

See Chapter 28, "Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing," Generating an XML File to Send to SEVIS, page 382.

Checklist Type

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

See Chapter 16, "Setting Up Checklists," page 149.

NID Type for AD and FA Loads

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

See Chapter 2, "Designing Campus Community," Defining National ID Types, page 15.

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

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

Country The system displays the installation country specified on the Installation Table component (INSTLALLATION_TBL3) page.

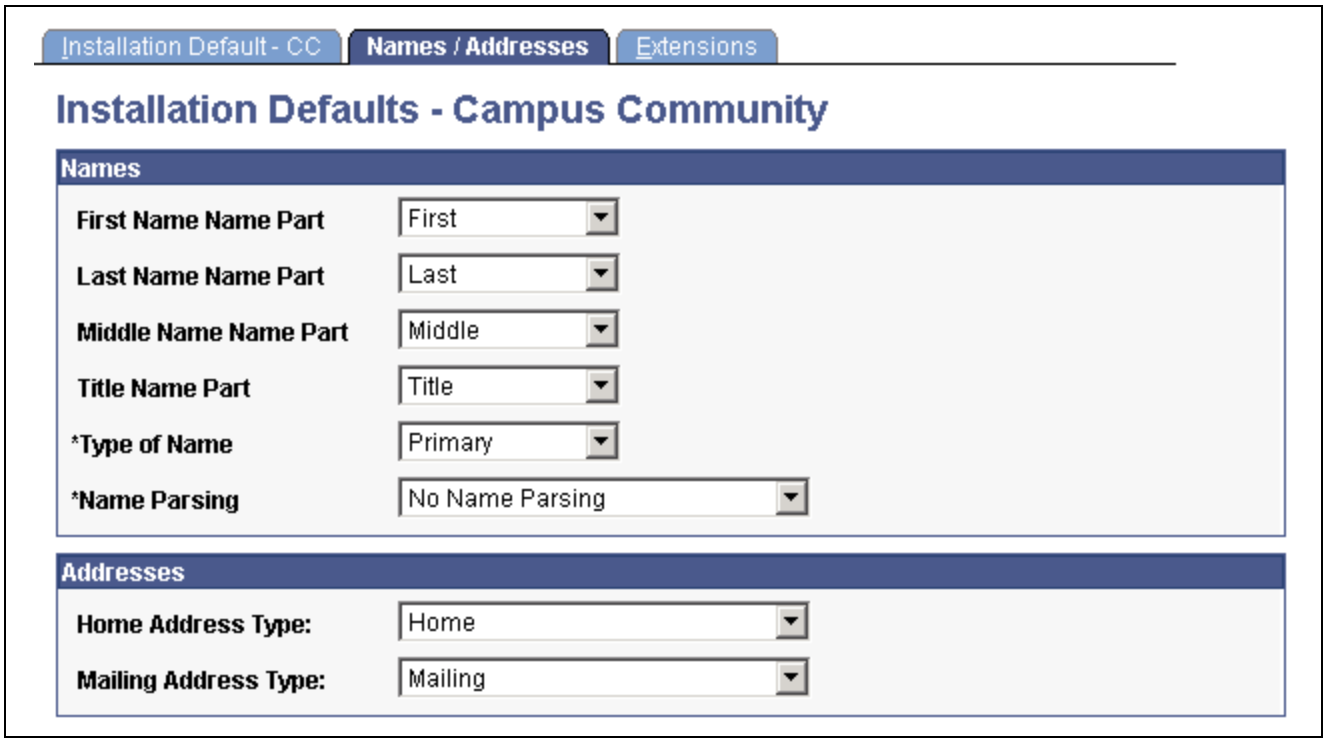
National ID Type Enter the default value for Admissions and Financial Aid processes to use in the National ID Type field when no default value is selected on the National ID Type Table page.

A NID value here is relevant only if your institution:

1. Uses the delivered Admission data load processes (such as ACT, ADA, AP, and so on) or the Financial Aid load processes (Financial Aid PROFILE, Need Access Process or Financial Aid ISIR).
2. Does not want to save a default National ID when creating new IDs for which no National ID is provided inside the data load.

Review or Define Default Installation Settings for Name and Address Types

Access the (Installation Defaults - Campus Community) Names / Addresses page.



(Installation Defaults - Campus Community) Names / Addresses page

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

Names

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

Addresses

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

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

See Also

Chapter 4, "Setting Up Search/Match," page 35

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Setting Up Type Control"

Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements

This section provides an overview of Campus Community and HRMS shared elements and references the PeopleSoft Enterprise Human Resources 8.9 PeopleBooks that discuss how to:

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

Understanding Campus Community and PeopleSoft Enterprise HRMS Shared Elements

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

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

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

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

Page Name	Object Name	Navigation	Usage
Name Prefix Table	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix	Set up or review name prefixes.
Name Suffix Table	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix	(Optional) Set up or review name suffixes for prompting pages with names data. Alternatively, you can manually include the suffix after the individual's last name on those pages.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix	Set up royal designations to precede a name.
Royal Name Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix	Set up royal designations to follow a name.
Name Title	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title	Set up titles that go with names. Titles can be royal, political, religious, and so on.
Name Type Table	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type	Define name types and the order in which to use them.
Address Type Table	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type	Define address types and the order in which to use them.
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table, Country Description	Review or update country descriptions and codes.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.
Valid Address page	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table	Specify the county, state, and city for the country that is selected from the Country Table.
Country Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report	Run the Country Table report (PER708) that prints a list of all country character codes.
State or Province Table	STATE_DEFN	Set Up HRMS, Install, State/Province	Add a state, province or equivalent entity for the country that is selected from the Country Table.

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type	Define or review default National ID values for a country.
Language Table	LANGUAGE_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Language Table	Define language codes.
Citizen Status	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status	Define codes for country citizenship.
Supporting Document Table	SUPPORT_DOC_TABLE	Set Up HRMS, Common Definitions, Supporting Documents	Define identification codes for documents that are required to obtain I-9 verification for individuals.
Visa/Permit Table	VISA_PERMIT_TABLE	Set Up HRMS, Product Related, Workforce Administration, Visas/Permits	Define codes for visas and permits required for noncitizens and their dependents.
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups	Define ethnic groups.
Name (Physician Table)	HS_PHYSICIAN_DATA1	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table, Name	Enter or review the name of a physician or other medical professional in your database.
Address (Physician Table)	HS_PHYSICIAN_DATA2	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table, Address	Enter or review the address of a physician or other medical professional in your database.
Phone Number (Physician Table)	NE_PERS_DTAPH_SEC	Click the Phone link at the bottom of the Address (Physician Table) page.	Enter or review the phone numbers of a physician or other medical professional in your database.
Diagnosis Table	DIAGNOSIS_TABLE	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Diagnosis Table	Create or review codes for injuries and illnesses that your institution wants to track.
Accommodation Type Table	ACCOM_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Accommodation Type	Set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities.

Page Name	Object Name	Navigation	Usage
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region	Define or review regulatory region descriptions and security access. Your system is delivered with regulatory regions predefined for Canada, the United States, Canadian provinces, and other areas. Use this page to set up additional regulatory regions.
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Define or review job codes. Job codes are used on the Accommodation Job Task page within Campus Community.
Business Units by Location	LOC_BU_SEC	Click the business units that use this setID link on the Location Address page.	View a list of the business units that use this setID.
Location Address	LOCATION_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location Table	Identify or review physical locations such as headquarters, satellite campuses, or remote recruiting offices. Job locations are used on the Accommodation Job Task page within Campus Community. **Note.** Do not confuse this location page with the Location Addresses page on which you set up campus location addresses.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter a phone number and fax number for a physical location.
Job Code Task Table	JOBCODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table	Define or review job tasks associated with a job code. Job code tasks are used on the Accommodation Job Task page within Campus Community.
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments	Identify an internal business entity or department. Departments are used on the Service Indicator Data 1 and Organization Communication 2 pages within Campus Community.

Page Name	Object Name	Navigation	Usage
License/Certification Table	LICENSE_CERTIF_TBL	Set Up HRMS, Common Definitions, Accomplishments, Licenses and Certifications	Set up licenses and certificates of interest to your institution.
Membership Table	MEMBERSHIP_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Memberships	Create codes for the memberships that your institution wants to track.

Setting Up Name Prefixes, Suffixes, Titles, and Types

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Personal Information Foundation Tables," Setting Up Additional Name Information.

Setting Up Address Types

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Personal Information Foundation Tables," Defining Address Types.

Administering Country Codes

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Administering Country Codes.

Adding the States or Provinces for a Country

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Adding the State, Province, or Equivalent Entity for a Country.

Defining National ID Types

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Adding the State, Province, or Equivalent Entity for a Country.

Defining Citizen Status Codes

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Personal Information Foundation Tables," Defining Citizen Status Codes.

Defining Ethnic Groups

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining Ethnic Groups and Chapter 5, "Setting Up Biographical Information," Defining Ethnic Groups, page 50.

Setting Up Visas and Permits

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining Visas and Work Permits.

Setting Up Physicians

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety*, "Setting Up Incident, Injury, and Illness Tracking," Entering Physician Information.

Setting Up Diagnosis Codes

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety*, "Setting Up Incident, Injury, and Illness Tracking," Defining Medical Diagnoses.

Setting Up Accommodation Types

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Documenting Disability Accommodations.

Setting Up Regulatory Regions

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Setting Up Regulatory Regions.

Setting Up Language Codes

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Tracking Employee Competencies and Accomplishments," Tracking Language Abilities.

Setting Up Jobs

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Jobs".

Defining Departments and Locations

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Maintaining Departments.

Setting Up Licenses and Certificates

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Tracking Employee Competencies and Accomplishments," Tracking Licenses and Certifications.

Setting Up Memberships

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Tracking Employee Competencies and Accomplishments," Tracking Professional Memberships.

Establishing Name Usages

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

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

Understanding Name Types and Usages

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

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

See *PeopleSoft Application Fundamentals for PeopleSoft Enterprise HRMS 8.9 PeopleBook, "Setting Up Additional Name Information."*

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

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

(BEL) Belgium

- Name
- First Name
- Last name
- Initials
- Preferred First Name
- Title

(BZL) Brazil

- First Name
- Middle Name
- Last Name
- Preferred First Name

(CHE) Switzerland

- Name
- Name Prefix
- First Name
- Middle name
- Last name
- Name Suffix

(CHN) China

- Prefix
- First Name

- Middle Name
- Last Name
- Suffix

(DEU) Germany

- Prefix
- Royal Prefix
- Name
- Title
- First Name
- Last Name
- Royal Suffix

(ESP) Spain

- Name
- Name Prefix
- First Name
- Last Name
- Second Last Name

(FRA) France

- Name Prefix
- First Name
- Middle Name
- Last Name

(HGK) Hong Kong

- Name Prefix
- First Name
- Preferred First
- Middle Name
- Last name
- AC Name

(ITA) Italy

- Name
- Name Prefix
- First Name
- Last Name

(JPN) Japan

- Name
- Last Name
- First Name
- Name Alternate Character

(MEX) Mexico

- Name Prefix
- First Name
- Last Name
- Second Last

(NLD) Netherlands

- Name
- Name Prefix
- First name
- Last Name
- Preferred First name
- Initials
- Title

English (USA and all others)

- Name
- First Name
- Middle Name
- Last Name
- Name Prefix
- Name Suffix

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

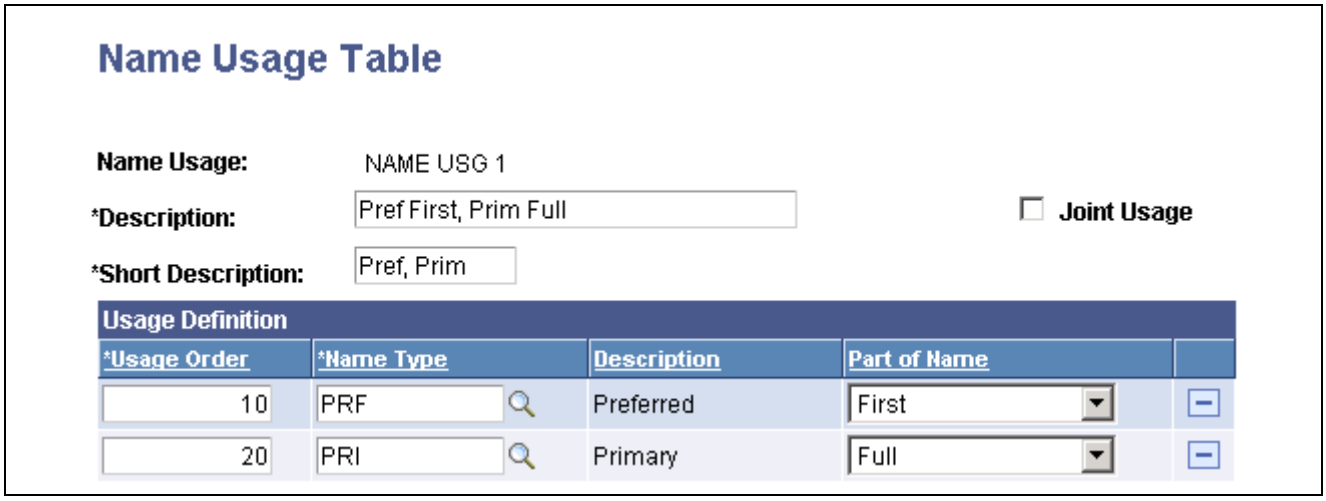
Arrange name types in the order that they should appear in an application. For example, when you print an admissions letter and envelope, the applicant's name appears first in the salutation of the letter and then on the envelope. If you select the *Admit* usage previously described, the preferred first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

Page Used to Set Up Name Usages

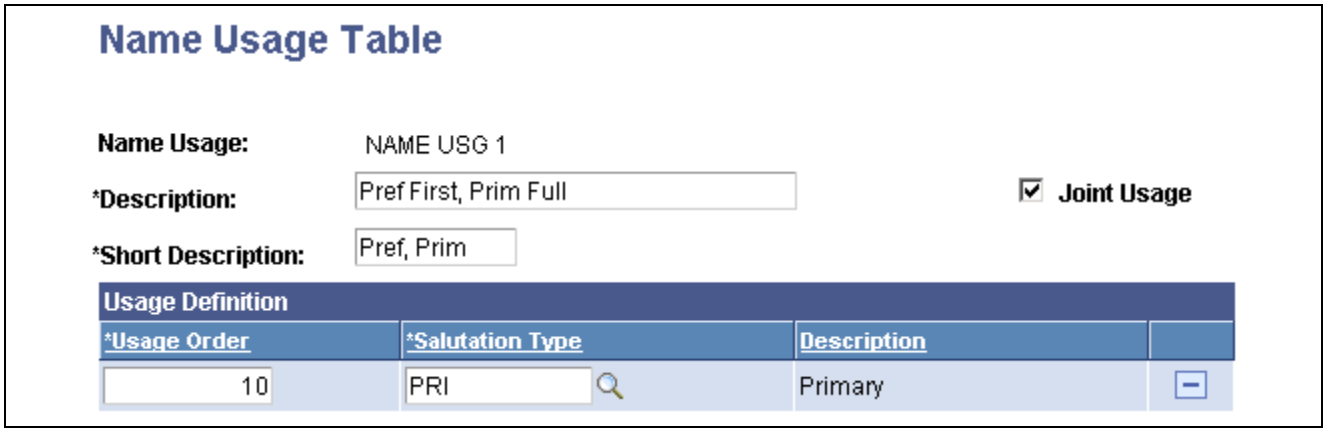
Page Name	Object Name	Navigation	Usage
Name Usage	NAME_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table	Define name usages to specify the hierarchies of name types that you want to use in a specific usage.

Defining Name Usages

Access the Name Usage page.



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



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

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

Joint Usage Select this check box to set this name usage for joint communication, or clear the check box to set it for general name usage.

The elements that appear in the Usage Definition area of the page vary depending on whether you select the Joint Usage check box. If the Joint Usage check box is selected, the Salutation Type field becomes available.

Create joint usages if your institution uses the Joint Communication Management feature. The joint name usages are used to define what salutation type you want to use on a letter sent jointly to two individuals when you use the letter generation process.

Usage Definition

Usage Order Displays the order in which the system will search for and use the associated data. The system displays the sequential usage order each time that you add a new row.

You can change the numbers to rearrange the order in which the system searches for and uses the name or salutation types.

Name Type and **Part of Name** If Joint Usage is not selected, the Name Type and Part of Name fields appear. Enter the type of name to use and select the name part to use within the specified name type.

Salutation Type If Joint Usage is selected, the Salutation Type field appears.

Salutation Type Enter the salutation type for which you want the system to search. Salutation types are defined on the Joint Communications page.

See Also

Chapter 31, "Managing Communications," page 433

Establishing Name Type Defaults

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

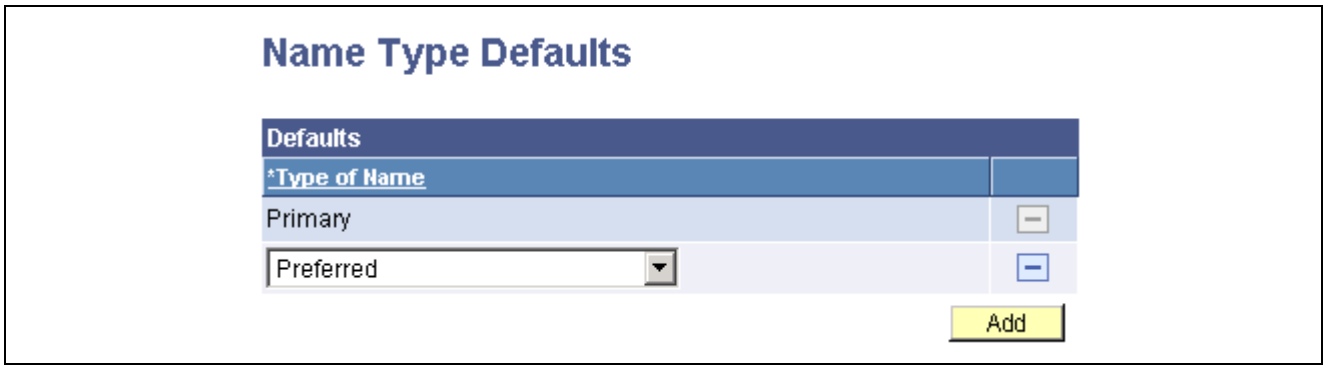
This section discusses how to establish the name types to create by default when adding a new person ID.

Page Used to Establish Name Type Defaults

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

Defining Name Type Defaults

Access the Name Type Defaults page.



Name Type Defaults page

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

Establishing Salutations

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

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

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

Understanding Salutations

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

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

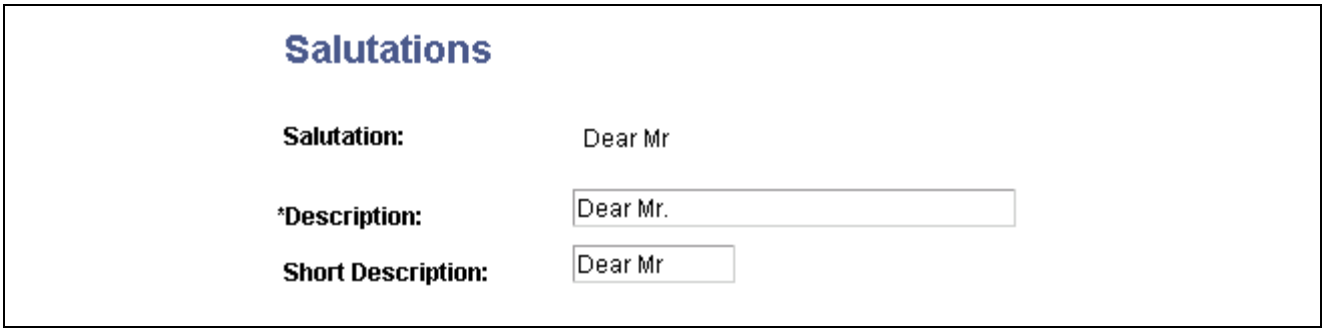
Also use salutation setup to maintain consistent use of a salutation type, assuring that all users entering data for joint communications use the same rules to enter the names. For example, if you set up a salutation type of *Friend* and define it to use only the individuals' first names, users can use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

Pages Used to Set Up Salutations

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

Creating Salutations

Access the Salutations page.

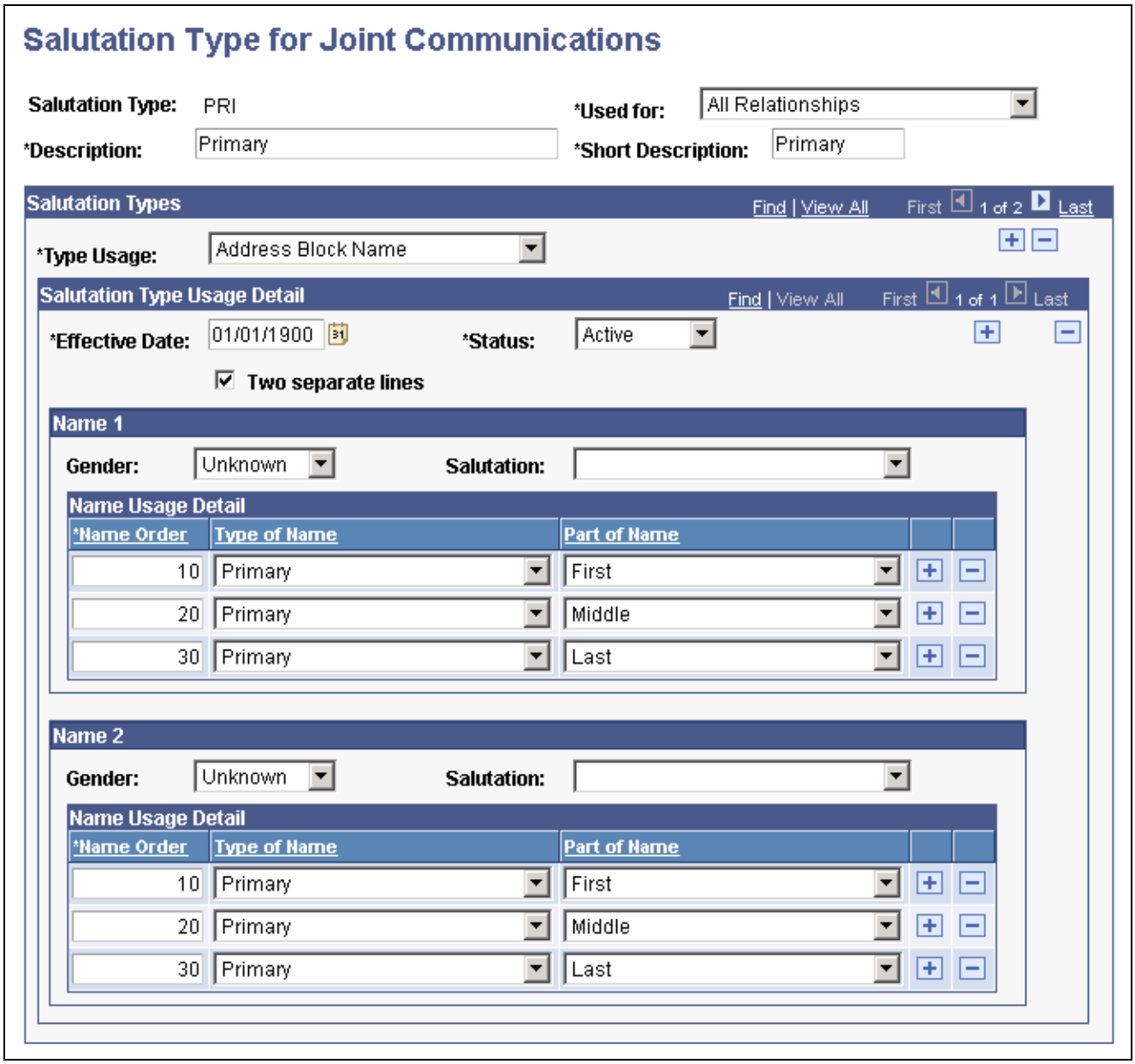


Salutations page

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

Defining Salutation Types for Joint Communications

Access the Salutation Type for Joint Communications page.



Salutation Type for Joint Communications page

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

Salutation Types

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

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

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

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

Salutation Type Usage Detail

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

John Smith

Mary Fletcher

Name 1; Name 2

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

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

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

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

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

Male: The system places the male name first.

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

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

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

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

Dear Mr. John Smith

Dear Mrs. Mary Fletcher

Name Usage Detail

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

You can change the numbers to rearrange the usage order.

Type of Name Select the type of name for which to search.

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

Establishing Address Usages

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

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

Understanding Address Usages

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

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

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

See Also

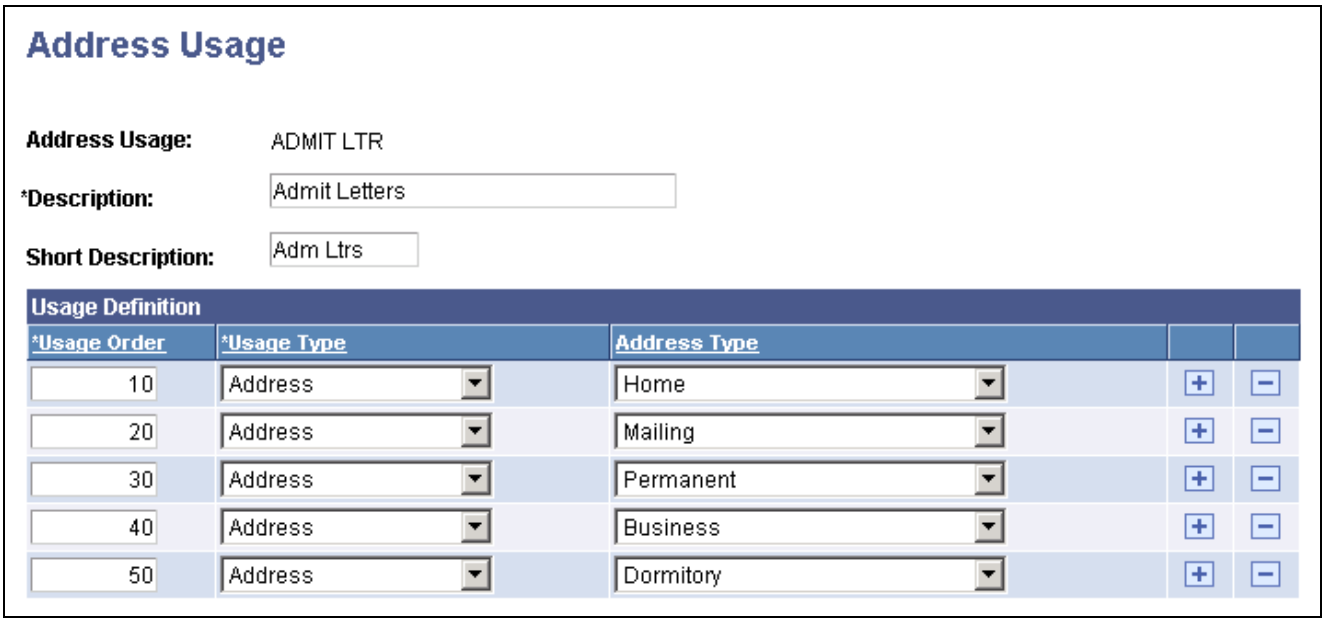
Chapter 22, "Managing Biographical Information," page 209

Page Used to Establish Address Usages

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

Defining or Reviewing Address Usages

Access the Address Usage page.



Address Usage page

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

Usage Order

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

You can change the numbers to rearrange the usage order.

Usage Type

Enter either the usage type (for example, *Address* or *Email*) to identify how the address type to search for is used.

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

Note. When the Usage Type is *Email,* the system extracts the specified email address, but it does not produce or send an email communication.

Address Type

Appears when the usage type is *Address.* Select the type of address to search for (for example, *Billing, Home,* or *Mailing*).

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

Establishing Phone Usages

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

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

(CAN) Understanding Phone Usages

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

To create an address usage for ESIS Current address reporting:

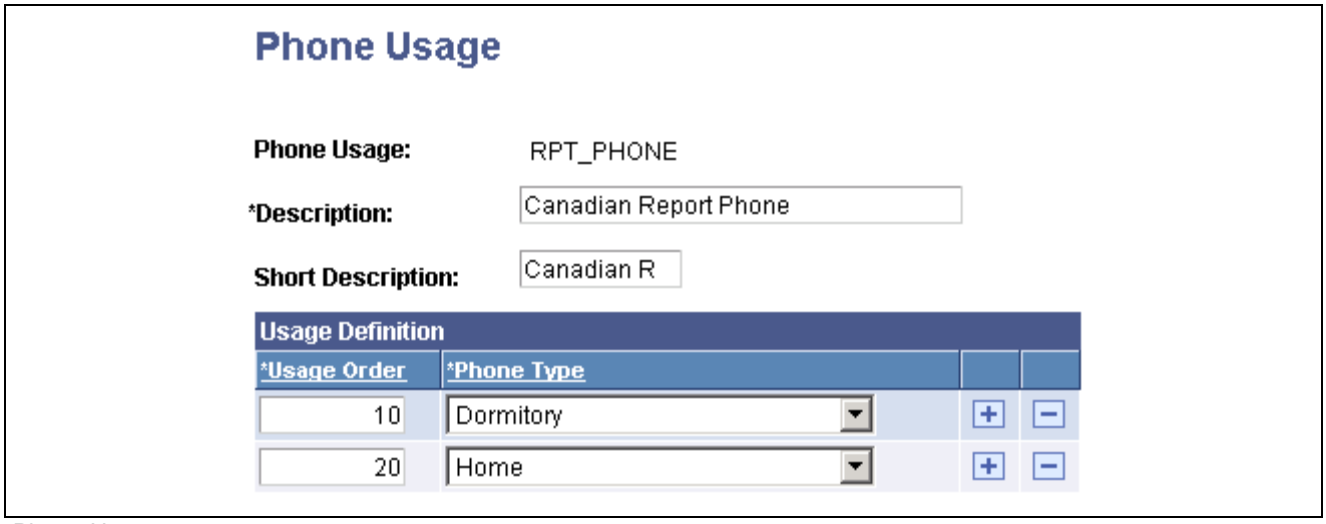
1. Access the Phone Usage page.
2. Add an Address Usage of *RPT_PHONE.*
3. In the Description field, enter *Phone Priority for Cdn Rpts.*
4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Ordr and Phone Type fields, insert rows for all phone usage types.

Page Used to Establish Phone Usage Types

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

Defining Phone Usage Types

Access the Phone Usage page.



Phone Usage page

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

You can change the numbers to rearrange the usage order.

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

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

Establishing Campus Locations

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

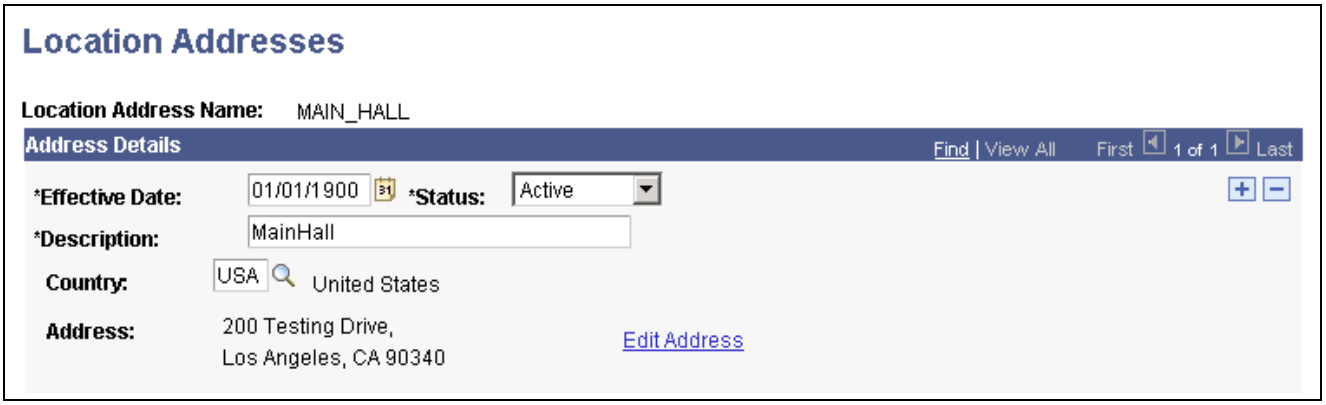
This section discusses how to define campus addresses for your institution.

Page Used to Define Campus Locations

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

Defining Campus Addresses

Access the Location Addresses page.



Location Addresses

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

Enter address information for this campus location.

Establishing ID Delete Control

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

See Chapter 19, “Managing IDs,” Deleting Individual IDs, page 172.

Establishing Search/Match Criteria

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

See Chapter 4, “Setting Up Search/Match,” page 35.

Establishing FERPA Privacy Control

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

See Chapter 26, “Managing FERPA Privacy Control,” page 299.

CHAPTER 3

Setting Up ID Delete Control

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

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

Understanding ID Delete Control

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

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

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

Common Elements Used in This Chapter

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

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

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

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

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

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

Controlling the Deletion of Individual IDs

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

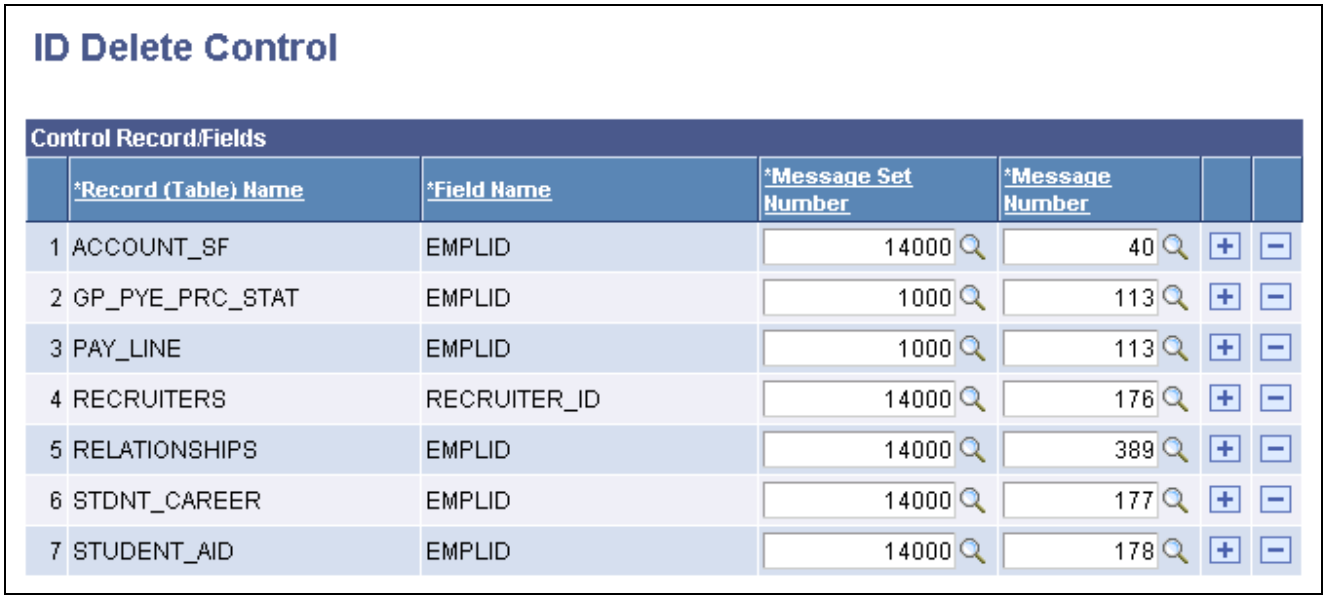
This section discusses how to define priority data to control the deletion of individuals IDs.

Page Used to Control the Deletion of Individual IDs

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

Defining Priority Data

Access the ID Delete Control page.



ID Delete Control page

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

- ACOUNT_SF
- RECRUITERS
- RELATIONSHIPS
- STDNT_CAREER
- STUDENT_AID

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

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

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

Controlling the Deletion of Organization IDs

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

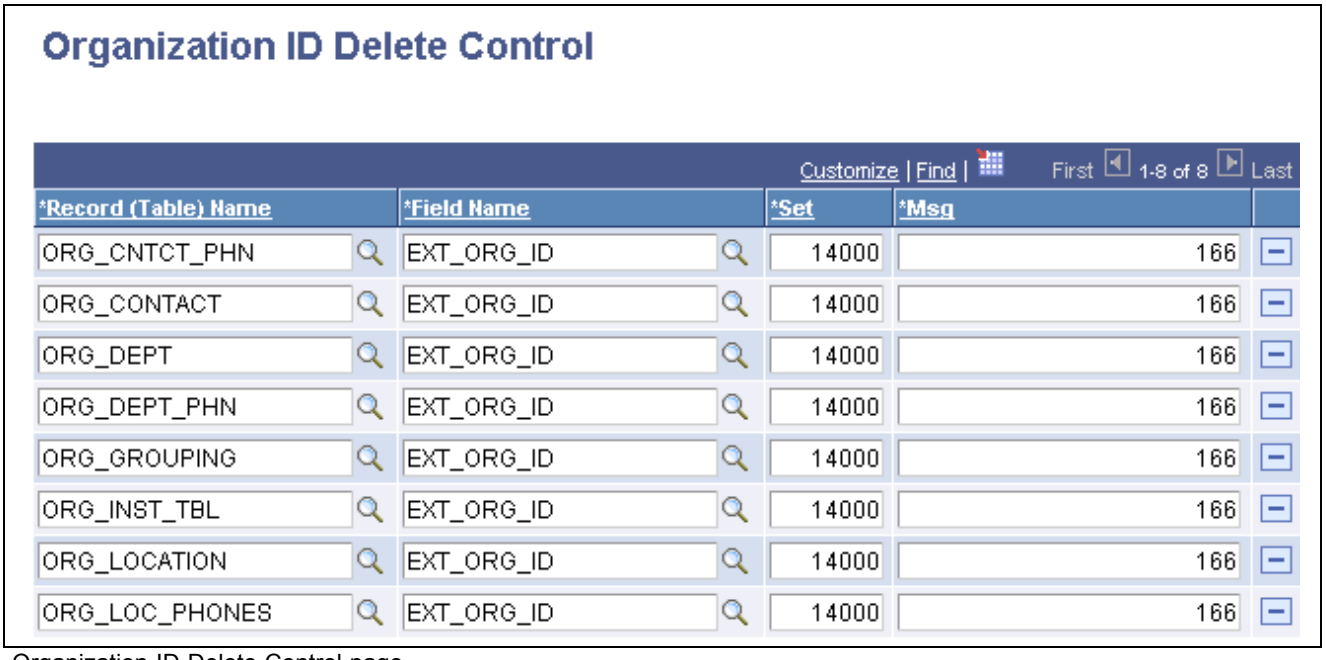
This section discusses how to define priority data to control the deletion of organization IDs.

Page Used to Control the Deletion of Organization IDs

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

Defining Priority Data

Access the Organization ID Delete Control page.



Organization ID Delete Control page

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

- ORG_CNTCT_PHN
- ORG_CONTACT
- ORG_DEPT
- ORG_DEPT_PHN
- ORG_GROUPING
- ORG_INST_TBL
- ORG_LOCATION
- ORG_LOC_PHONES

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

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

CHAPTER 4

Setting Up Search/Match

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

Understanding Search/Match

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Application Engine Programs:

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

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

SQR Programs:

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

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

See Also

Chapter 20, “Searching for Records and Using Search/Match,” Using Search/Match, page 183

Automatic Search

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

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

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

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

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

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

See *Enterprise PeopleTools PeopleBook: Security*

See Chapter 20, “Searching for Records and Using Search/Match,” Viewing Search Results, page 189.

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

Understanding Automatic Search Conditions

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

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

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

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match".

Setting Up Search/Match

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

This section discusses how to:

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

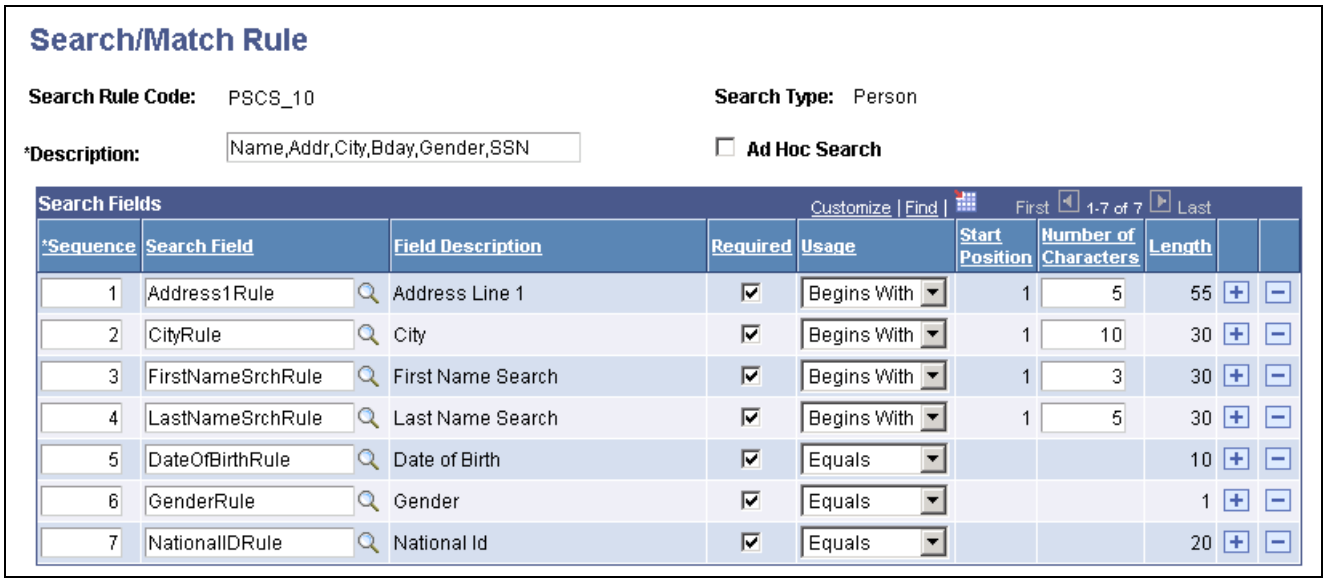
Pages Used to Set Up Search/Match

Page Name	Object Name	Navigation	Usage
Search/Match Rule	HCR_SM_RULE	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules	Define sets of fields to search for and identify how to search for them.
Search Parameters	HCR_SM_PARM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.

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

Defining Search Rule Codes

Access the Search/Match Rule page.



Search/Match Rule page

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

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

Search Fields

Search fields are delivered with your system.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

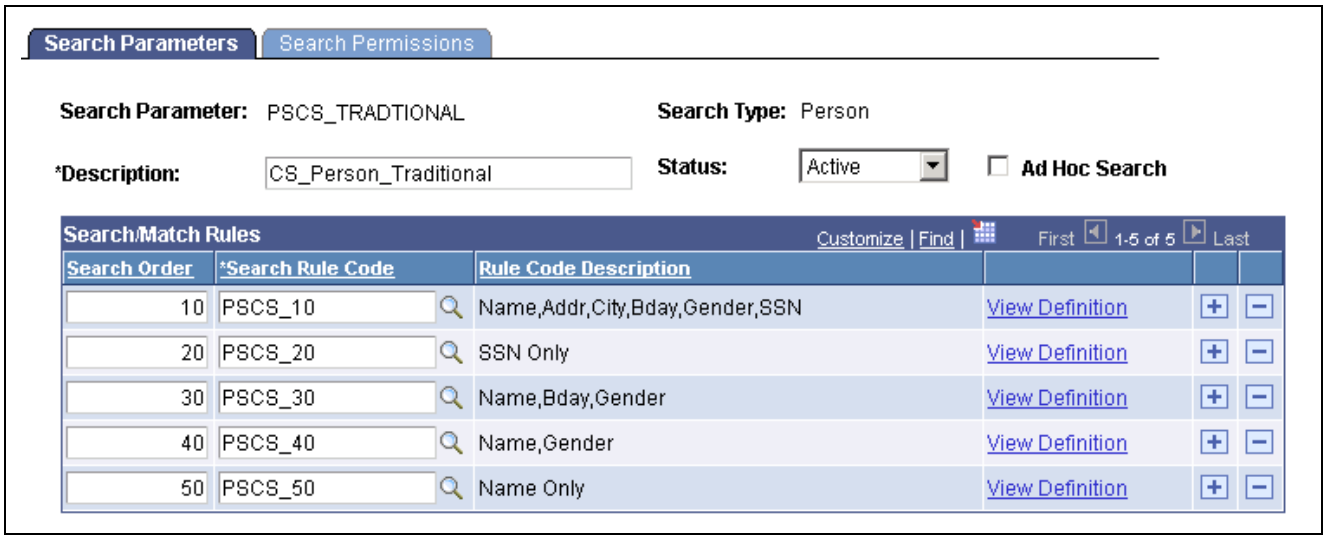
If the usage selected was *Begins With,* the start position is a default value of *1.* You need to specify how many characters from the first character that Search/Match should use to perform the search.

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

See Chapter 4, “Setting Up Search/Match,” Understanding Search/Match, page 35.

Defining Search Parameters

Access the Search Parameters page



Search Parameters page

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

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

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

Search/Match Rules

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

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

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

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

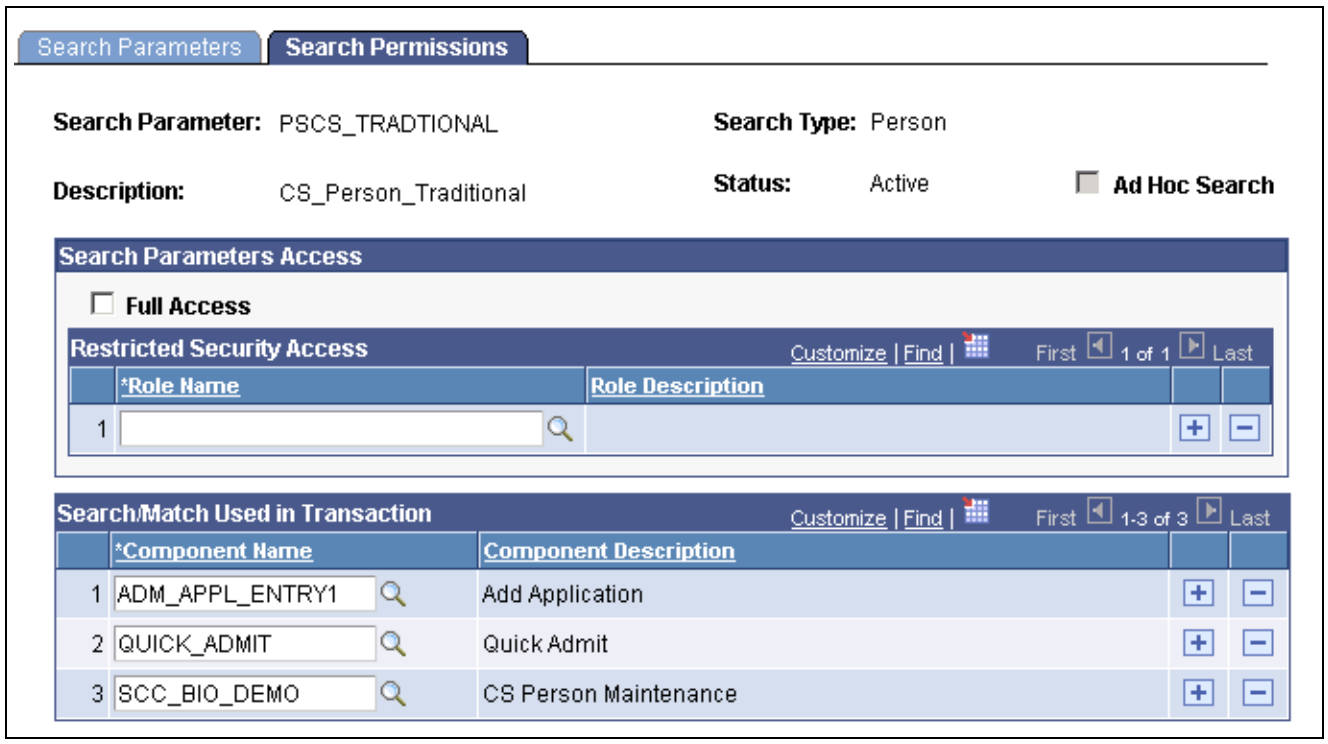
You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when theAd Hoc Search check box is selected.

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

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

Defining Search Permissions

Access the Search Permissions page.



Search Permissions page

Search Parameters Access

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

Restricted Security Access

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

Role Name and **Role Description** Restrict the use of this search parameter code to users that have specific roles inside their security profile.

Search/Match Used in Transaction

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

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

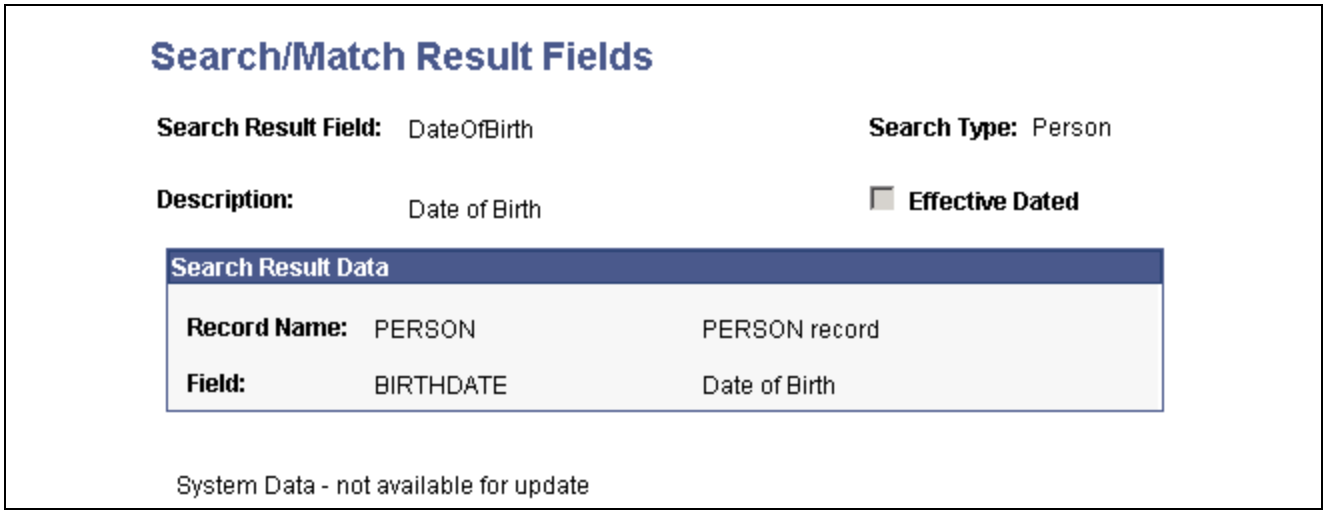
If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a warning message indicating that one or more matching IDs was found at search order number XX.

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

See Chapter 4, "Setting Up Search/Match," Automatic Search, page 37.

Viewing or Adding Search/Match Result Fields

Access the Search/Match Result Fields page.



Search/Match Result Fields page

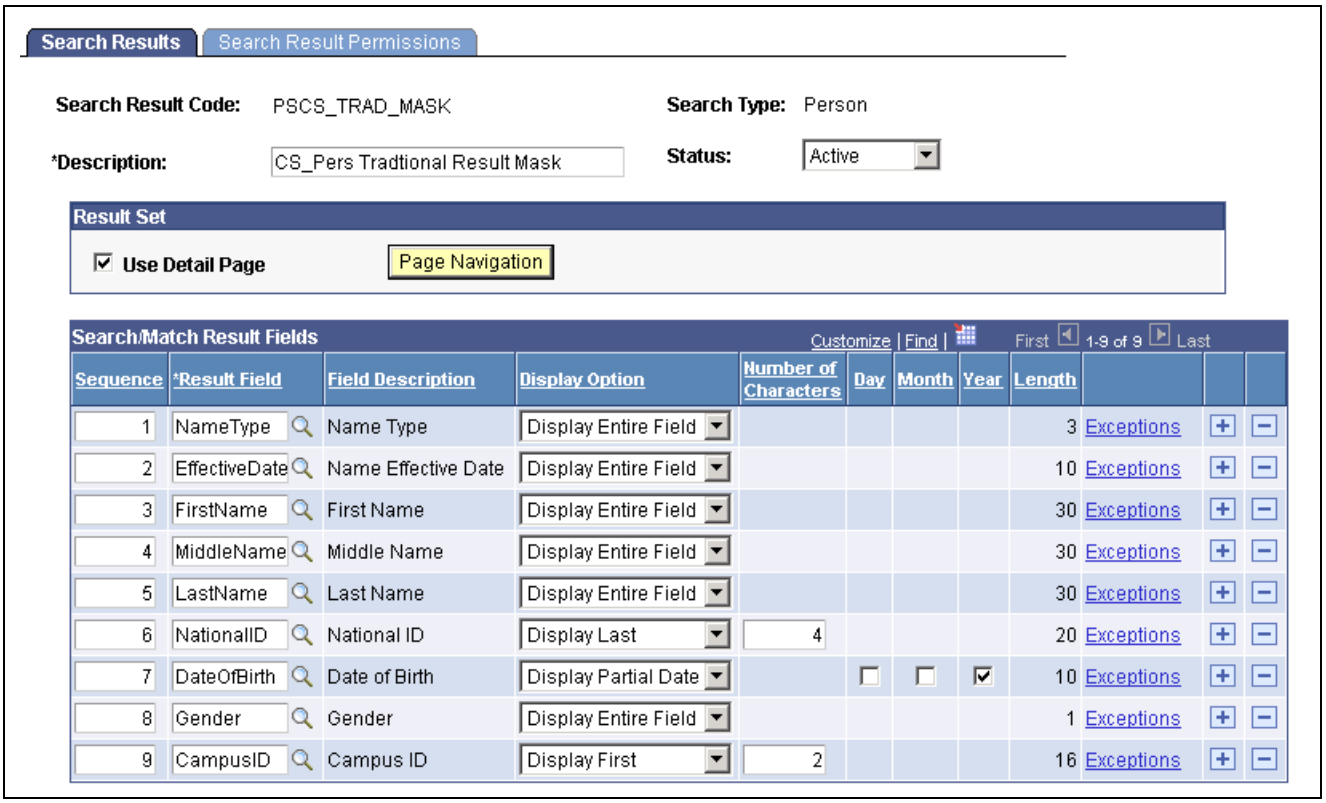
Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the predefined search fields. You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

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

Note. You can use name and national ID fields as search result fields, otherwise type-related, effective-dated fields (address type, email type, phone type, and so on) are not recommended. Names and national IDs are type-related, effective-dated fields that are major indicators of individual uniqueness. Therefore, Search/Match returns a row for each name and each national ID that matches the search criteria. However, for other type-related, effective-dated fields, Search/Match returns only the first match that it encounters, which could be minimal and misleading when trying to detect duplicates.

Configuring Search/Match Results

Access the Search Results page.



Search Results page

Result Set

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

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

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

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

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

Search/Match Result Fields

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

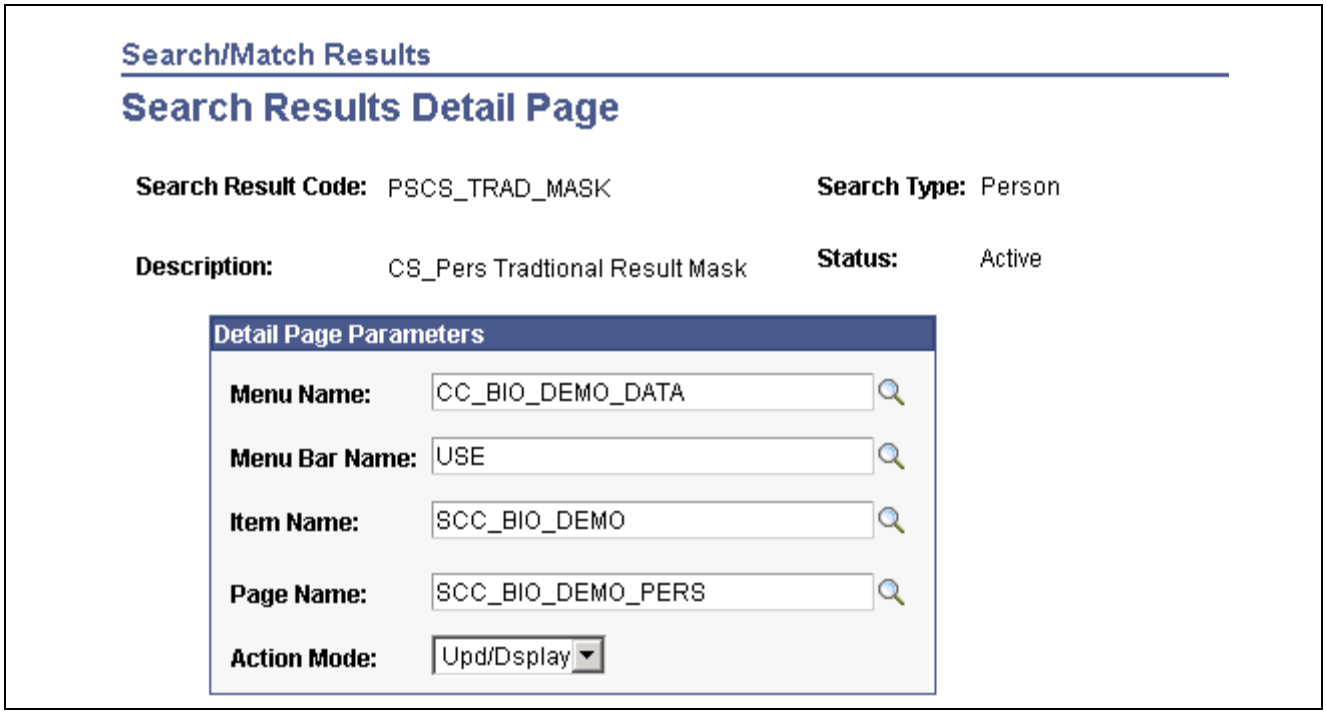
Result Field and**Field Description** Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields).

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

Display Option	Displays the default display control for that field. You can override this. Select *Display Entire Field* or *Mask Entire Field* to display or hide the entire field value respectively . The other options are: *Display First:* Displays the first specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the beginning of the field value. *Display Last:* Displays the last specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the end of the field value. *Display Partial Date:* Displays the specified parts of a date field value. When you select this, the Day, Month, Year check boxes appear. You must select which parts of the date to display. For example if you select *Year,* only the year will appear.
Number of Characters	Enter the number of first or last characters of a field value to display.
Day, Month, Year	Select the parts of the date to display for a date value.
Length	Displays the number of characters possible for the field value.
Exceptions	Click this link to access the Exceptions page, on which you can define field-level exceptions to these results.

Entering Search Results Details

Access the Search Results Detail page.



Search Results Detail page

Detail Page Parameters

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

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

Add

Correction

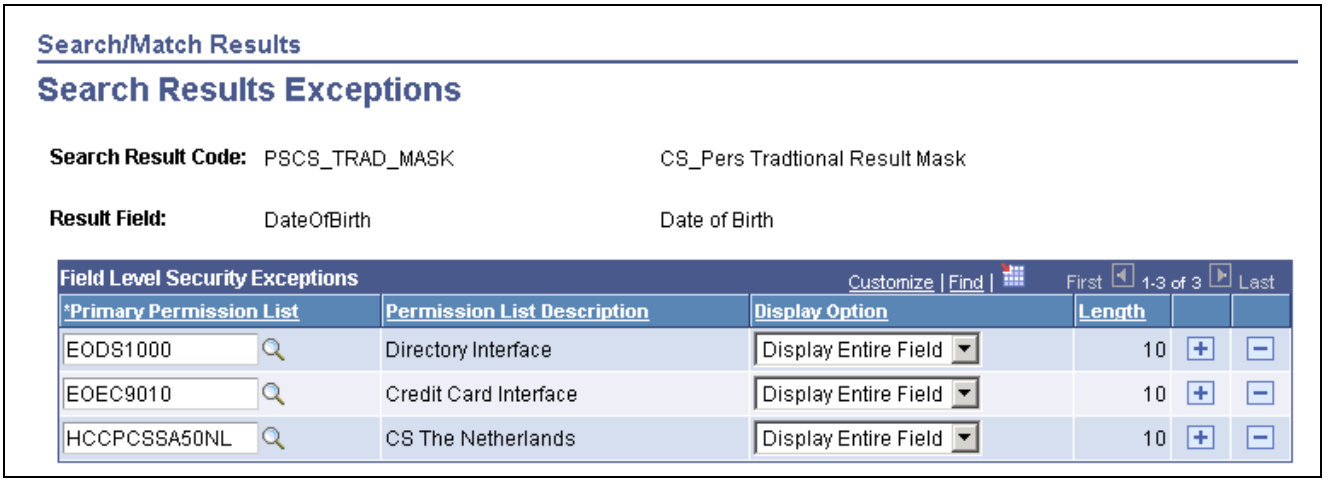
Data Entry

Update/Display

Update

Defining Search Results Exceptions

Access the Search Results Exceptions page.



Search Results Exceptions page

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

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Creating and Maintaining User Profiles".

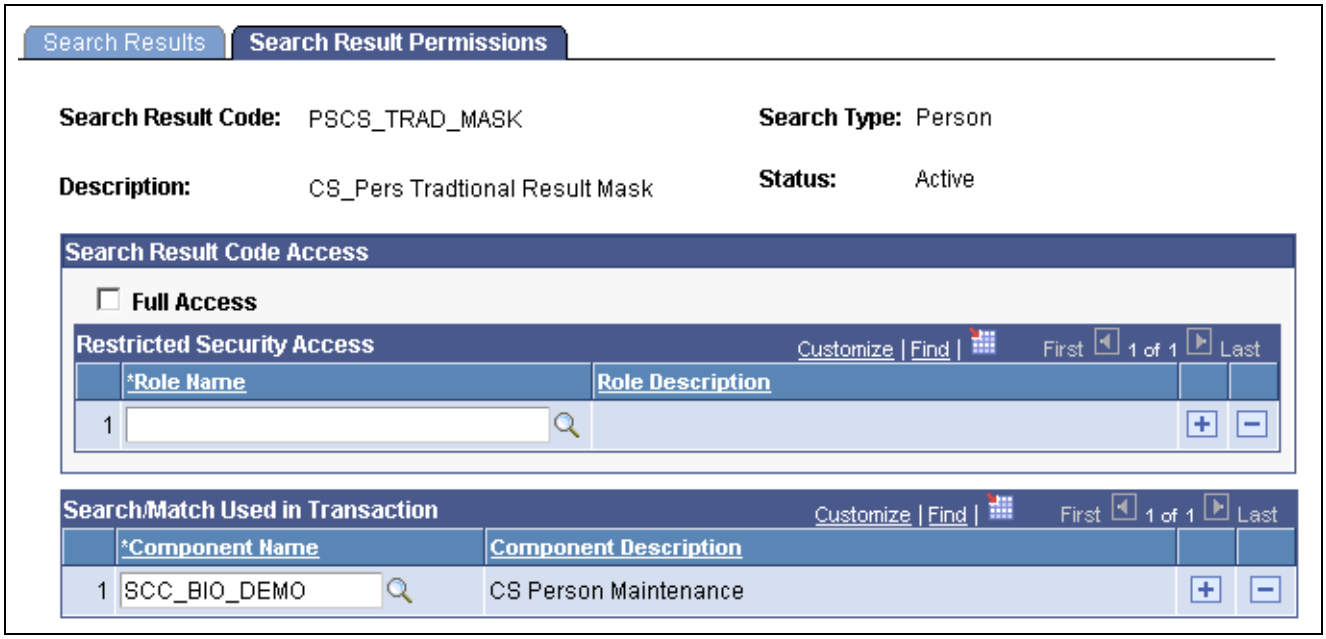
Field Level Security Exceptions

Primary Permission List and **Permission List Description** — Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.

Display Option — Select the display option to use as the exception to the display option selected on the Search Rules page.

Configuring Search Result Permissions

Access the Search Result Permissions page.



Search Result Permissions

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

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

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

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

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

See Chapter 4, "Setting Up Search/Match," Automatic Search, page 37.

See Also

Chapter 20, "Searching for Records and Using Search/Match," Viewing Search Results, page 189

CHAPTER 5

Setting Up Biographical Information

This chapter discusses how to:

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

See Also

Chapter 2, "Designing Campus Community," page 5

Setting Up Names, Addresses, and Phone Numbers

See Chapter 2, "Designing Campus Community," page 5.

Setting Up Personal Attributes

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

This section discusses how to:

- Define ethnic groups.
- Define religious preference codes.
- Set up decedent data.

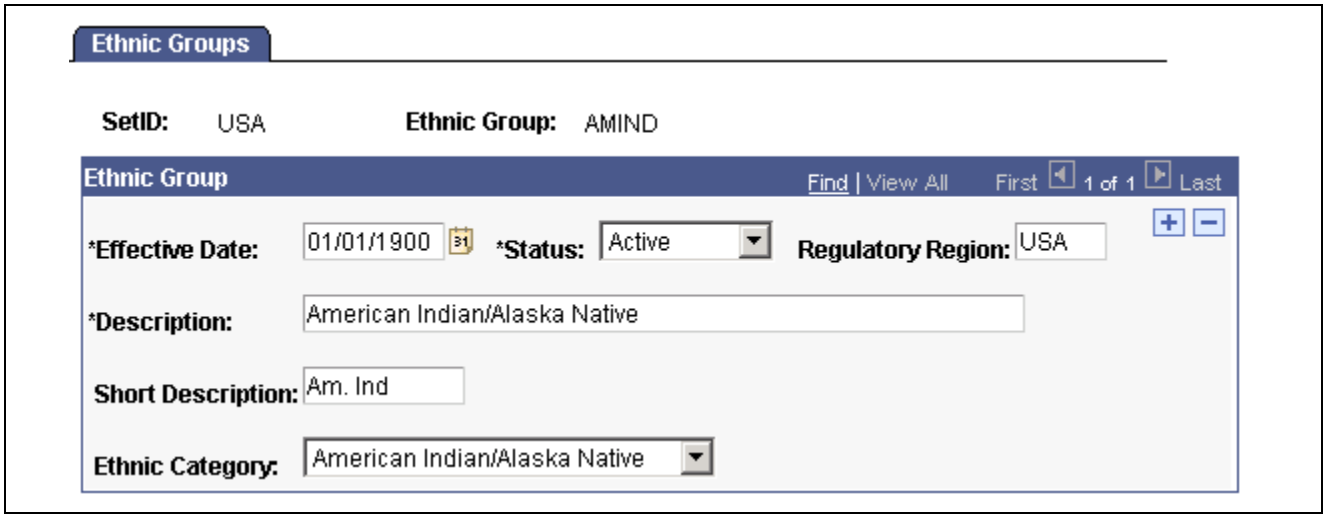
Note. Languages are set up from the HRMS Accomplishments component.

Pages Used to Set Up Personal Attributes

Page Name	Object Name	Navigation	Usage
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, WorkForce Administration, Ethnic Groups	Define ethnic groups.
Religious Preference Table	REL_PREF_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Religious Preference Table	Define religious preference codes.
Language Table	LANGUAGE_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Language Table	Define language codes. See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Defining Ethnic Groups

Access the Ethnic Groups page.



Ethnic Groups page

Ethnic Group

Ethnic Category

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

PeopleSoft delivers some ethnicity groups predefined and associated with U.S. recognized ethnic group categories. These categories are translate values (*White, Black/African American, Hispanic/Latino, Asian, SAmerican Indian/Alaska Native, Native Hawaiian/Other Pacific Islander,* and *Not Specified*.) Do not modify these delivered values. Modifications to these translate values could require substantial programming effort. You can,

however, create additional ethnic groups and associate them with existing ethnic categories to reflect the diverse ethnicities that comprise your campus community.

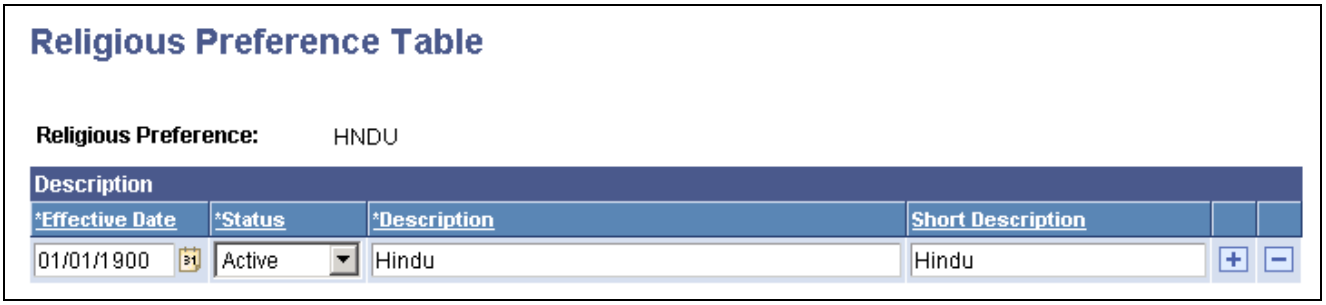
See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Defining Ethnic Groups

Chapter 22, "Managing Biographical Information," Entering Ethnicity Percentages, page 230

Defining Religious Preference Codes

Access the Religious Preference Table page.



Religious Preference Table

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

See Also

Chapter 22, "Managing Biographical Information," Entering Religious Preferences, page 232

Setting Up Decedent Data

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

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

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

See Chapter 7, "Setting Up Service Indicators," page 89.

Setting Up FERPA Privacy Control

See Chapter 8, "Setting Up FERPA Privacy Control," page 95.

Setting Up Individual Relationships

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

This section discusses how to:

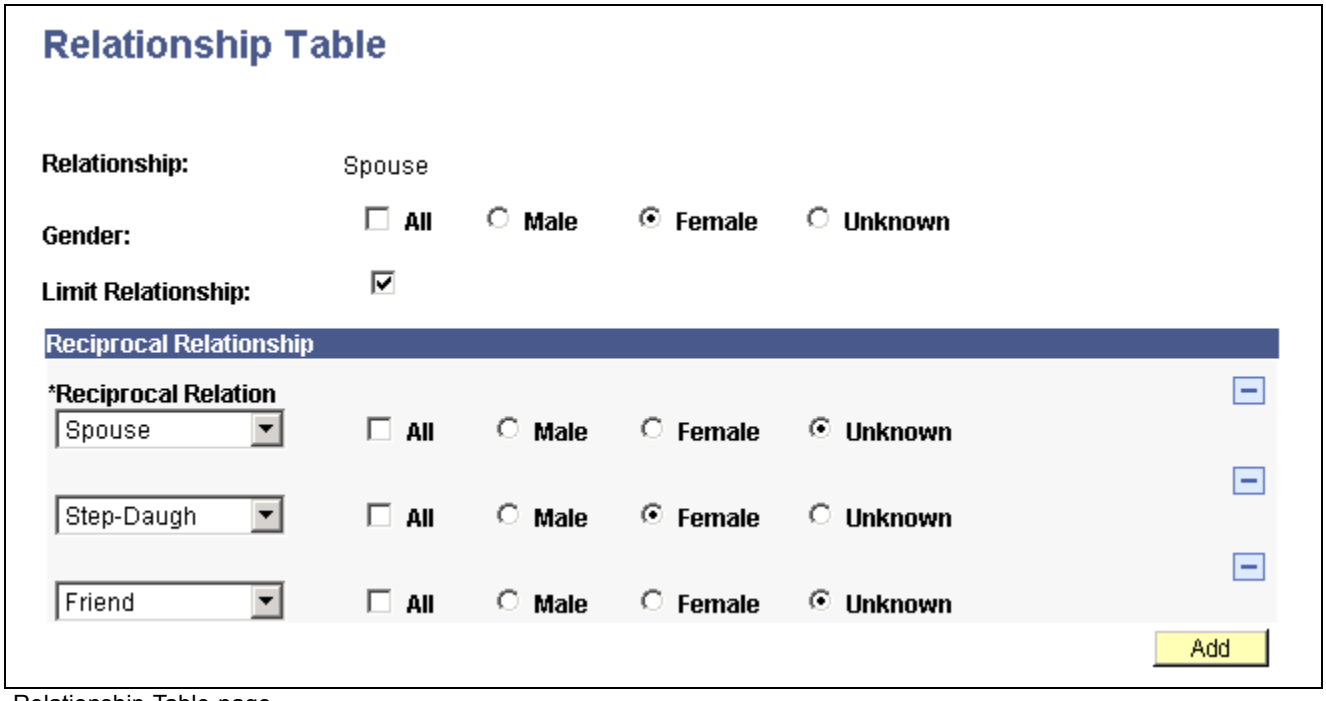
- Define reciprocal relationships.
- Enable marital status verification.

Pages Used to Set Up Individual Relationships

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

Defining Reciprocal Relationships

Access the Relationship Table page.



Relationship Table page

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

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

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

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

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

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

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

Reciprocal Relationship

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

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

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

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

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

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

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

Enabling Marital Status Verification

Access the Relationship/Marital Status page.

Relationship/Marital Status page

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

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

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

Setting Up Relations to the Institution

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

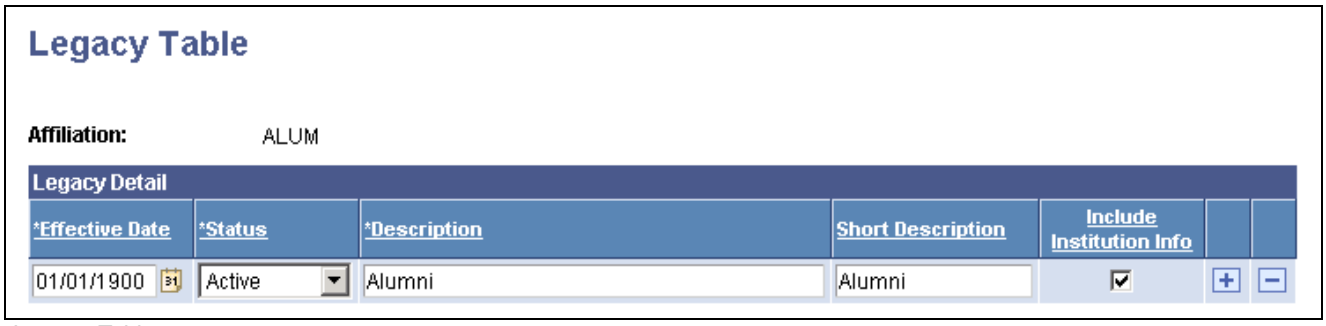
This section discusses how to define or review legacy affiliation types that are used to identify relations to the institution.

Page Used to Set Up Relations to the Institution

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

Defining Legacy Affiliation Types

Access the Legacy Table page.



Legacy Table page

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

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

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Managing Constituent Data," Establishing Relationships

Setting Up Emergency Contacts Data

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

See Also

Chapter 22, "Managing Biographical Information," Entering Emergency Contact Data, page 249

(USA) Setting Up Work Experience Classification Codes

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

This section discusses how to:

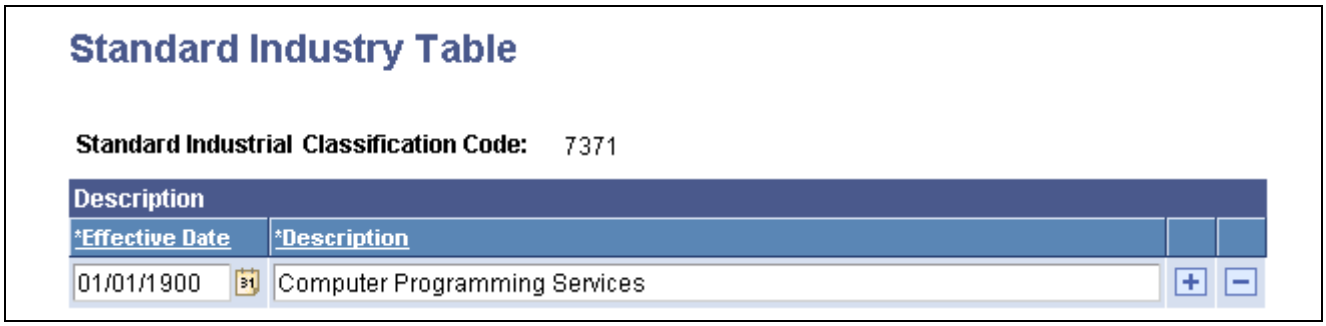
- Add or review Standard Industry Classification (SIC) codes.
- Add Standard Occupation Classification (SOC) codes.

Pages Used to Set Up Work Experience Classification Codes

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

Adding or Reviewing SIC Codes

Access the Standard Industry Table page.



Standard Industry Table page

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

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

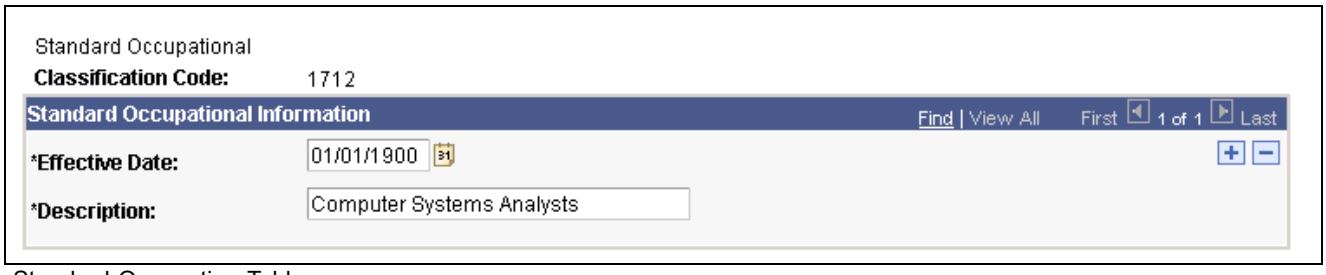
See Also

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Jobs"

Adding SOC Codes

Access the Standard Occupation Table page.



Standard Occupation Table page

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

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

See Also

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Jobs"

CHAPTER 6

Setting Up Patriot Act SEVIS Solution Visa Processing

This chapter discusses how to:

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

See Also

Chapter 28, "Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing," page 321

Setting Up SEVIS Visa Processing

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

This section discusses how to:

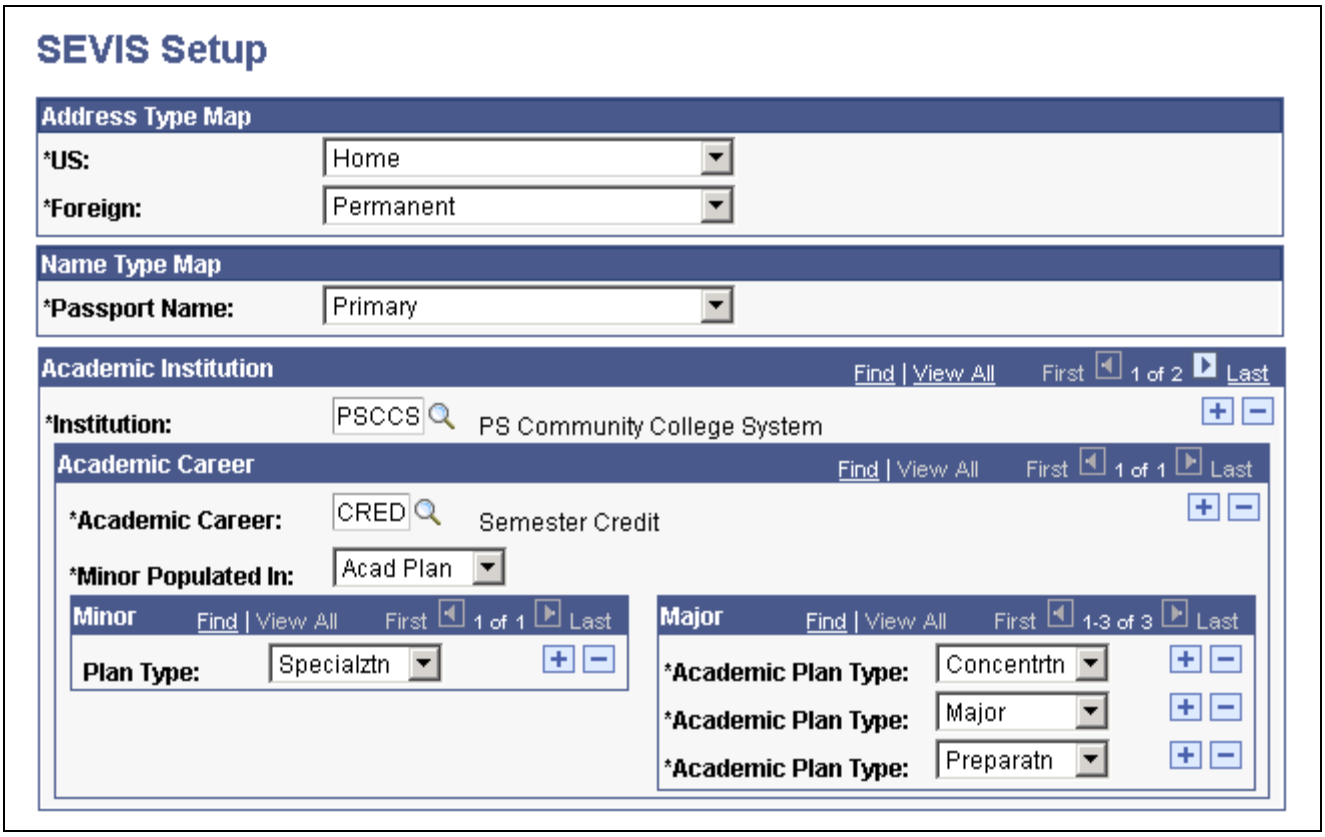
- Define your institution.
- Map to SEVIS country data.
- Map to SEVIS visa types.
- Map to SEVIS name suffixes.
- Map to SEVIS event types.
- Define SEVIS file error messages.

Pages Used to Set Up SEVIS Visa Processing

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

Defining Your Institution

Access the SEVIS Setup page.



SEVIS Setup page

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

Address Type Map

US Select the address in the United States to report to SEVIS.

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

Name Type Map

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

Academic Institution

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

Academic Career

Academic Career Select the career that is matched to your institution. You define the careers for your institution.

Minor Populated In (F and M visas only.) Select either *Acad Plan* (academic plan) or *Sub Plan*. This value is used in selecting the minor to report to SEVIS.

Minor (for F and M visas only)

The SEVIS Alerts - F/M process uses the plan type and subplan type values to determine which plans to extract as minor.

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

You must enter one of these academic plan types:

Concentrntn (concentration)

Honors

Major

Minor

Prepratn (preparation)

ROTC (Reserve Officer Training Corps)

Specialztn (specialization)

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

You must enter the type of subplan. Values are:

Conc (concentration)

Emphasis

Minor

Optio

Spec(specialization)

Track

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

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

For F and M visas, this is the I-20 logic to use to determine the primary and secondary majors. For J visas, this is the DS-2019 logic to use to determine the subject field code for student category exchange visitors.

Values are:

Concentrntn (concentration)

Honors

Major

Minor

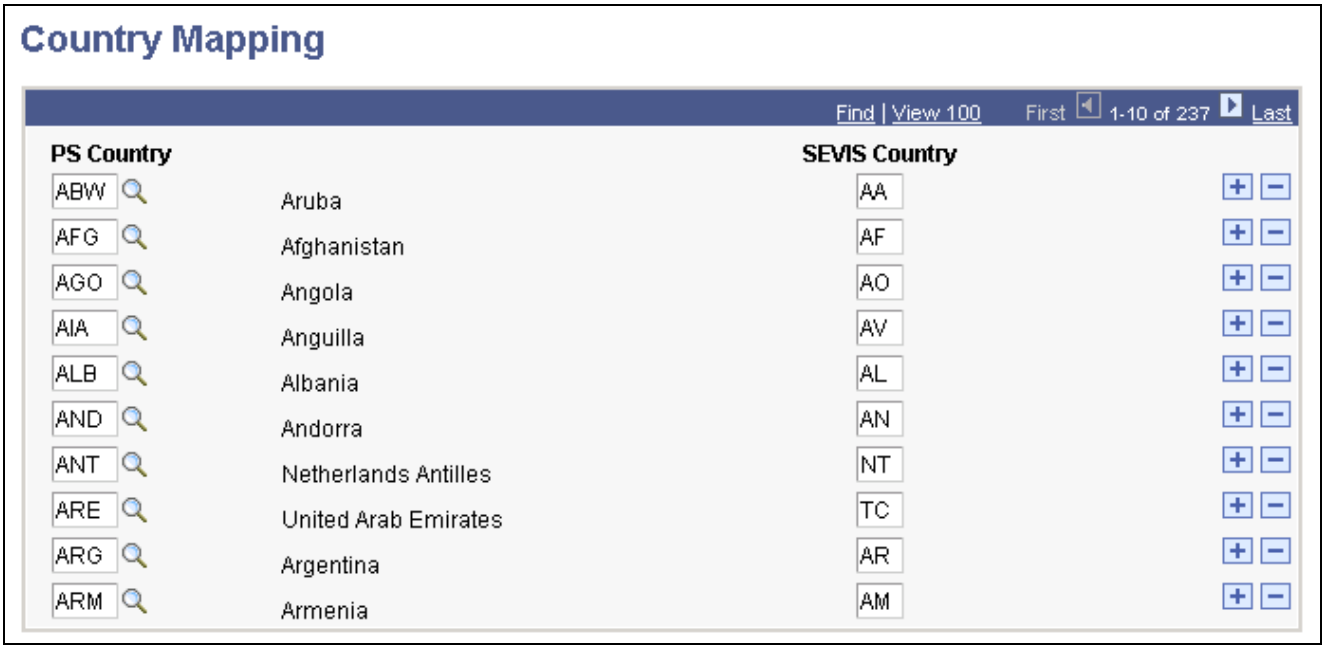
Prepratn (preparation)

ROTC (Reserve Officer Training Corps)

Specialztn (specialization)

Mapping to SEVIS Country Data

Access the Country Mapping page.



Country Mapping page

Note. The DHS defines the SEVIS country values in the lookup tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the country codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

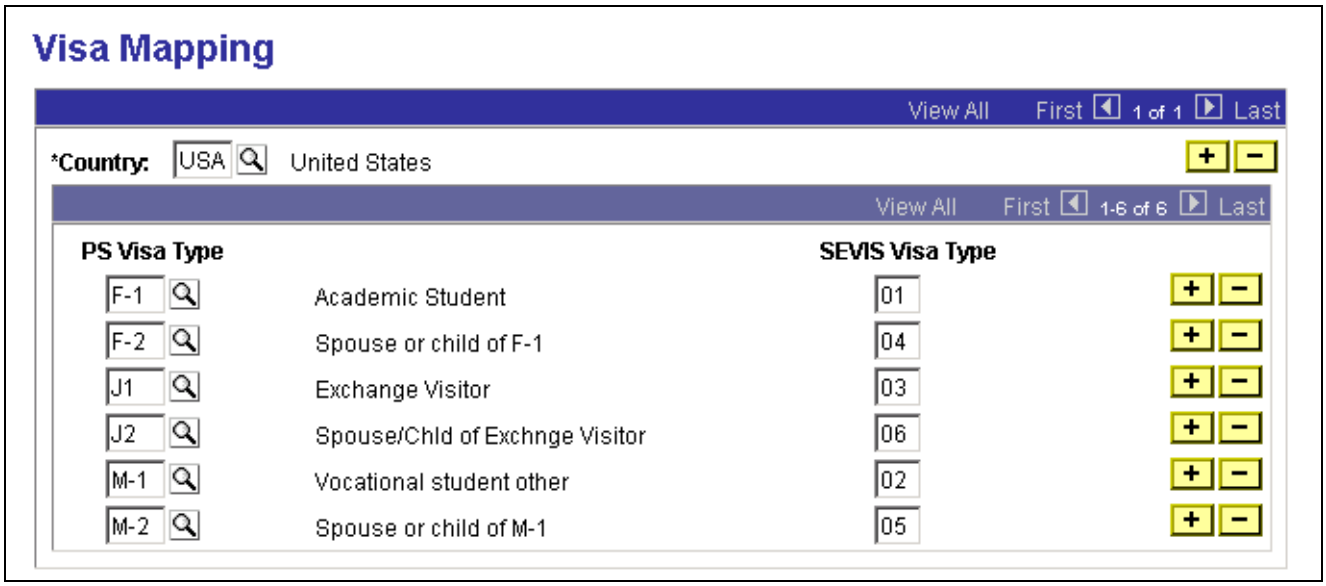
Warning! The U.S. Minor Outlying Islands (UMIs) and Serbia and Montenegro (SCG) are not mapped to one DHS SEVIS country code. The PeopleSoft system uses International Standards Organization country codes, which do not include separate country codes for each island or country. SEVIS, however, uses country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

PS Country Enter the country code used by the PeopleSoft system.

SEVIS Country Enter the country code used by SEVIS for that country, as defined by Federal Information Processing Standards.

Mapping to SEVIS Visa Types

Access the Visa Mapping page.



Visa Mapping page

Note. You must map each PeopleSoft visa type to a SEVIS visa type defined in the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document.

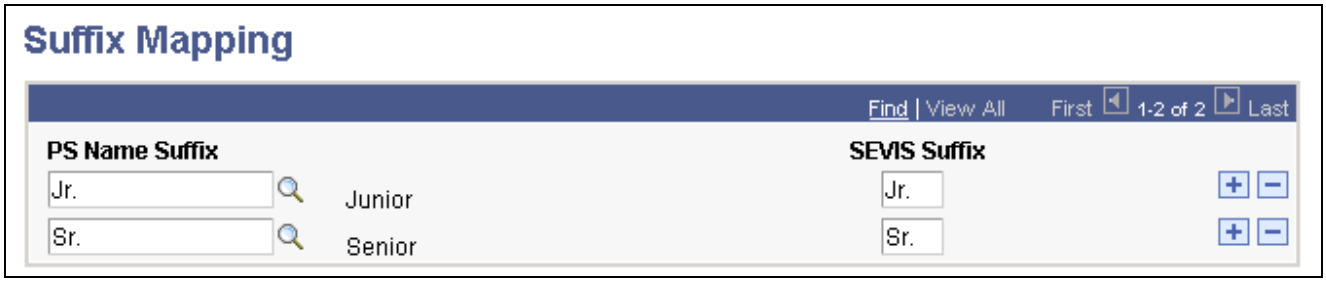
Country Select the country to which the student is traveling. For SEVIS use, this is USA.

PS Visa Type(PeopleSoft visa type) Enter the PeopleSoft visa type code.

SEVIS Visa Type Enter the visa type code established by SEVIS.

Mapping to SEVIS Name Suffixes

Access the Suffix Mapping page.



Suffix Mapping page

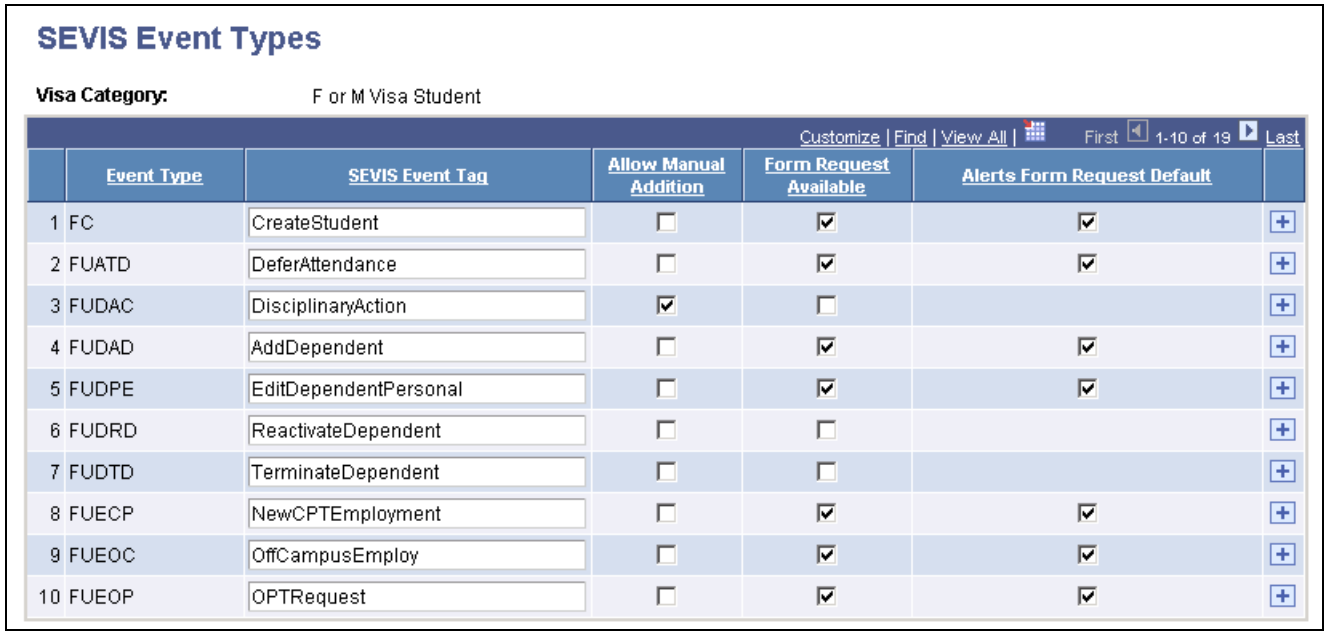
Note. You must map each PeopleSoft name suffix to the SEVIS name suffixes that the DHS defines in the lookup tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the suffix codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

PS Name Suffix (PeopleSoft name suffix) Select a name suffix from the available options.

SEVIS Suffix Enter the corresponding DHS SEVIS name suffix for the selected PeopleSoft name suffix.

Mapping to SEVIS Event Types

Access the SEVIS Event Types page.



	Event Type	SEVIS Event Tag	Allow Manual Addition	Form Request Available	Alerts Form Request Default
1	FC	CreateStudent	☐	☑	☑
2	FUATD	DeferAttendance	☐	☑	☑
3	FUDAC	DisciplinaryAction	☑	☐	
4	FUDAD	AddDependent	☐	☑	☑
5	FUDPE	EditDependentPersonal	☐	☑	☑
6	FUDRD	ReactivateDependent	☐	☐	
7	FUDTD	TerminateDependent	☐	☐	
8	FUECP	NewCPTEmployment	☐	☑	☑
9	FUEOC	OffCampusEmploy	☐	☑	☑
10	FUEOP	OPTRequest	☐	☑	☑

SEVIS Event Types page

Note. The DHS may update the events from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

Event Type Displays the PeopleSoft event type codes for the visa category (F/M visas or J visas) entered. The SEVIS Alerts process uses these codes.

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

SEVIS Event Tag Enter the DHS description of the event. You can modify event tags.

Allow Manual Addition Select to enable manual addition of this event type on the SEVIS Alerts page. The delivered event types that allow manual addition are:

Auth Drop Below Full Course

Disciplinary Action

Terminate Student (for F and M visa holders and EV matriculation)

End Program

Correct Infraction

Terminate Exchange Visitor

Validate Participant (for J visa holders)

Designated school officials (DSOs) can make manual additions on the SEVIS Alerts page to submit certain data to SEVIS when student or exchange visitor updates are not detected as data changes in the PeopleSoft Enterprise Campus Solutions system.

Form Request Available Select to indicate that a PDF form file (I-20 for F and M visas, or DS-2019 for J visas) can be requested for this event.

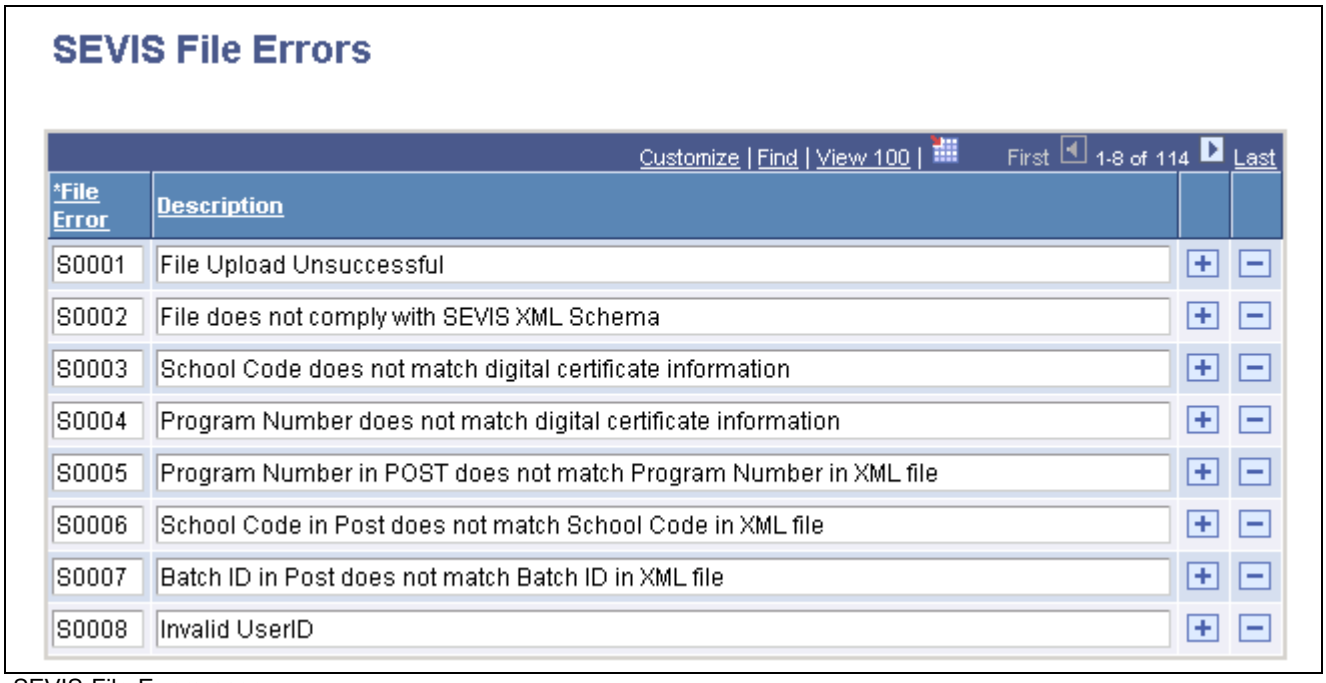
PeopleSoft delivers the field populated based on the information in the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document.

Alerts Form Request Default Select to set the *New Form* field on the SEVIS Alerts page to *Yes* for this event.

PeopleSoft delivers this field populated based on the information in the*Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document, but you can modify it based on your institution's preferences.

Defining SEVIS File Error Messages

Access the SEVIS File Errors page.



SEVIS File Errors page

Note. You must enter into your PeopleSoft Enterprise Campus Solutions system, the SEVIS file error messages that the DHS defines in the Appendix B: SEVIS Batch Process Error Codes section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the error messages from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

File Error Enter the DHS error code.

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

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

Description Enter the DHS description of the error code.

Setting Up F and M Visas Processing

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

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

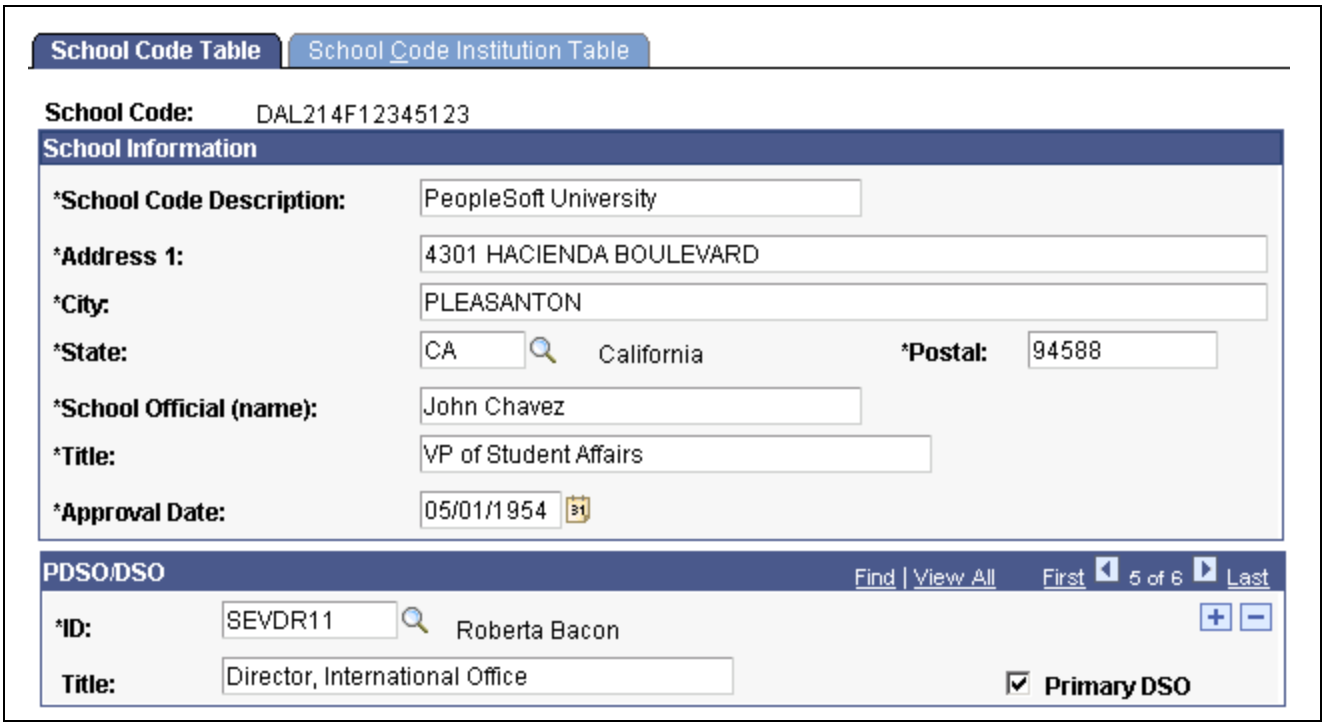
- Set up SEVIS school codes.
- Define the institution for a school code.
- Set up SEVIS school code security.
- Set up U.S. Department of State postal codes.
- Set up port of entry data.
- Map SEVIS visa types to levels of education.
- Set up SEVIS fee codes.
- Create an I-20 form template.

Pages Used to Set Up F and M Visas Processing

Page Name	Object Name	Navigation	Usage
School Code Table	SEV_SCHL_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table	Set up school and designated school officials information for F and M student visas.
School Code Institution Table	SEV_SCHL_CD2_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table, School Code Institution Table	Set up academic institution and academic career information for F and M student visas.
SEVIS School Code Security	SEV_SCHLCD_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, SEVIS, School Code Security	Set F and M visas school code security access for a user.
Dept of State Post Code Table	SEV_DOS_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Dept of State Post Code Table	Reference the Department of State post code information for F and M student visas.
Port of Entry Table	SEV_POE_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Port of Entry Table	Reference the DHS port of entry information for F and M student visas.
Visa/Level of Education Map	SEV_LVL_VISA_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Visa/Level of Education Map	Determine the levels of education that are available for F and M classification students on the I-20 form. For example, the Flight Training level is only valid for M-1 students.
Fee Code Table	SEV_FEE_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Fee Code Table	Set up the fee code information to use with the I-20 template for student F and M visas.
I-20 Template	SEV_I20_TEMPLATE	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, I-20 Template	Set up default information to include in I-20 forms for student F and M visas.

Setting Up SEVIS School Codes

Access the School Code Table page.



School Code Table page

Note. PeopleSoft stores up to the ninth digit of the U.S. postal code in SEVIS Master to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in SEVIS Master. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run the export and alerts processes, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the processes ignores everything after the ninth digit.

School Information

Use the school code assigned by SEVIS to access this page. Then enter information here to match the information that you record in the SEVIS RTI (Real Time Interface) for your school certification. The data that you enter is for internal purposes and appears in display-only mode on the I-20 form pages.

School Code Description Enter the description for the school code entered.

Address 1, City, State Enter the address for the school code entered.

School Official (name) Enter the contact school official.

Title Enter the title of the person named as school official.

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

PDSO/DSO

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

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

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

See Chapter 24, "Managing Identification Data," Entering External System IDs, page 280.

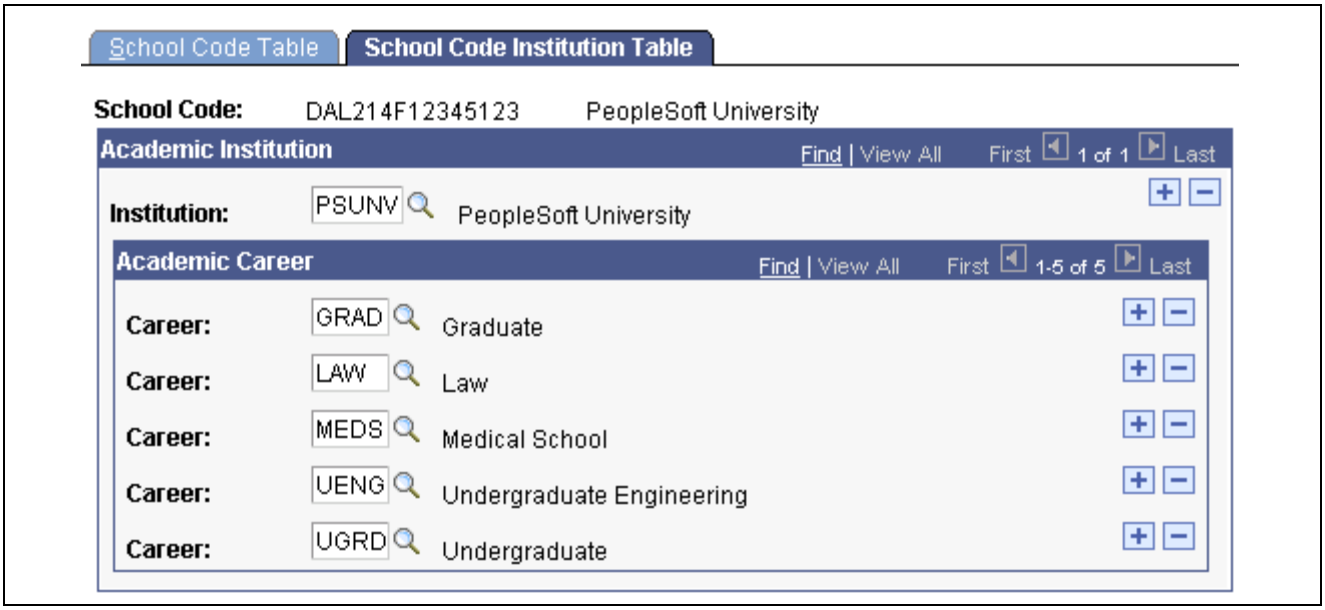
Title Enter the title of the primary designated school official or the designated officer named.

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

You must select one person as the primary DSO to be able to save the information on this page.

Defining the Institution for a School Code

Access the School Code Institution Table page.



School Code Institution Table page

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

Academic Institution

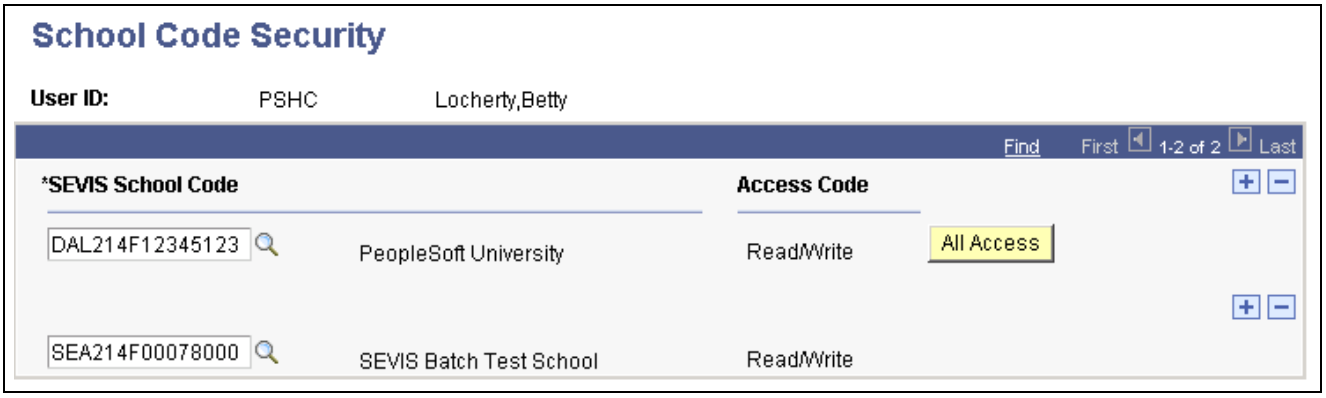
Academic Institution Select each institution that is affiliated with the school code.

Academic Career

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

Setting Up SEVIS School Code Security

Access the School Code Security page.



School Code Security page

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

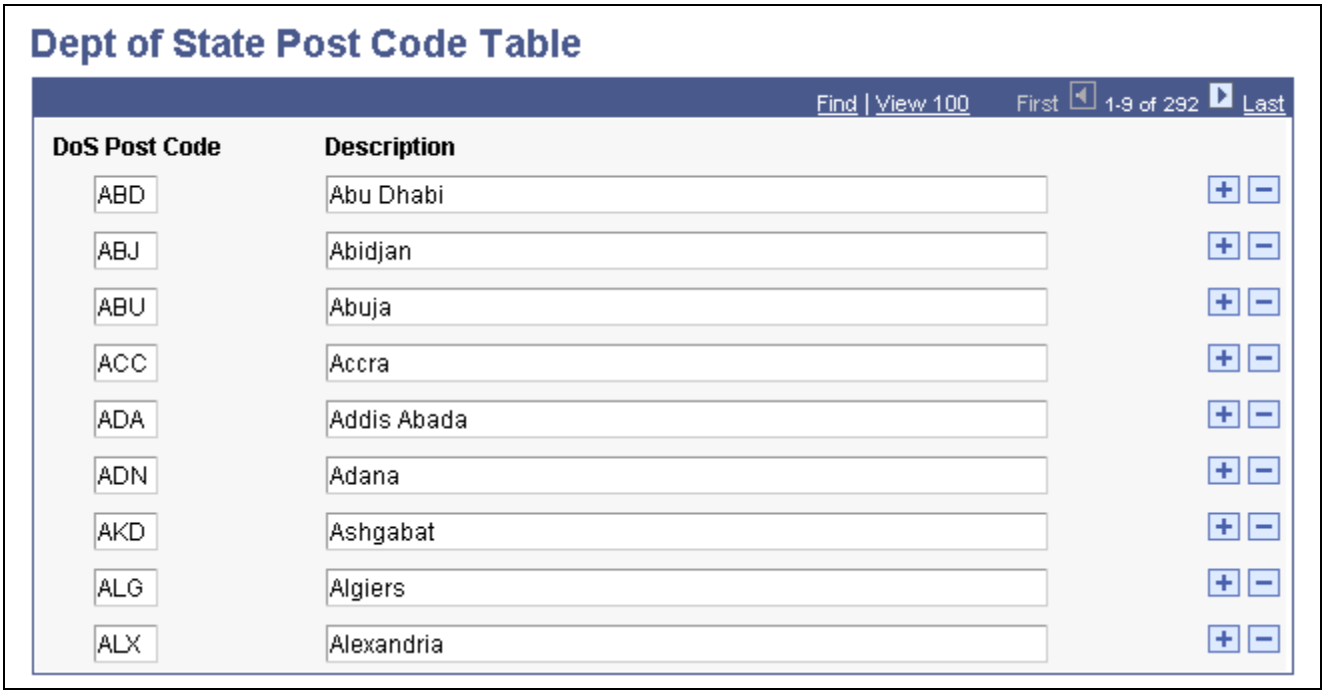
SEVIS School Code Select the SEVIS school codes to which this user should have access.

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

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

Setting Up U.S. Department of State Post Codes

Access the Dept of State Post Code Table page.



Dept of State Post Code Table page

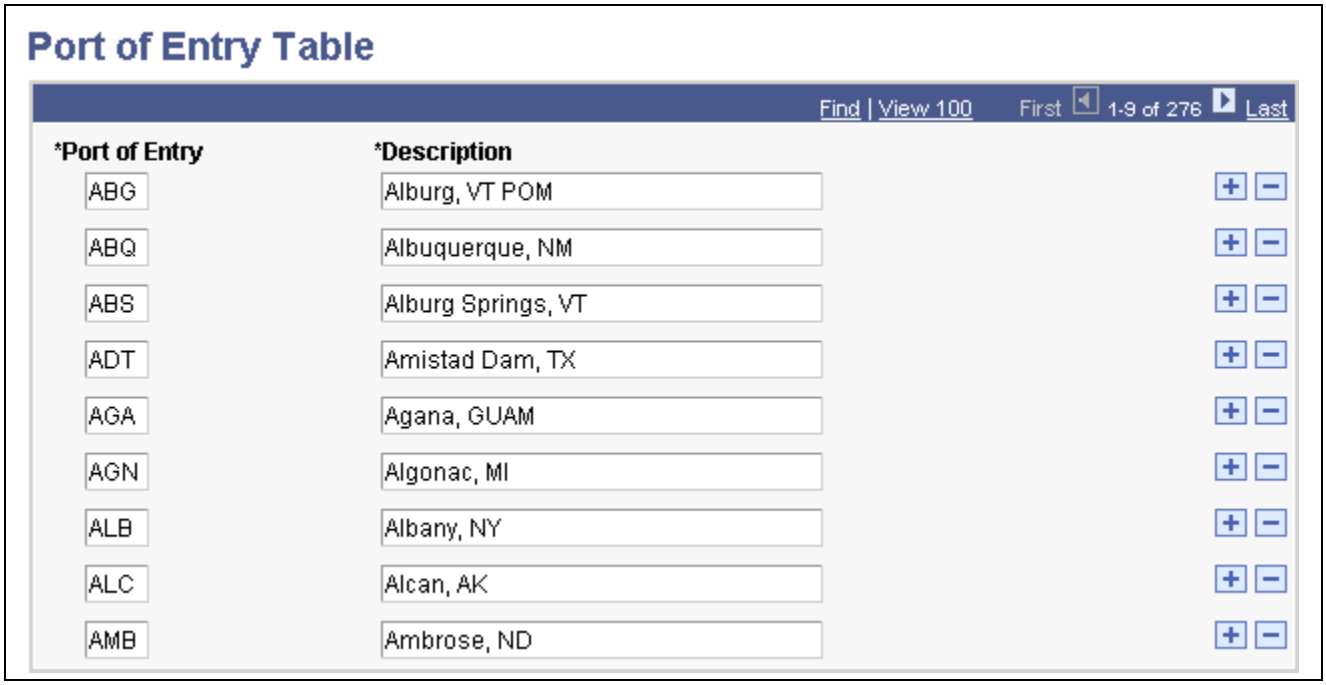
Note. The DHS defines the Dept of State (DoS) post code values in the lookup tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the DoS post codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

DoS Post Code (Department of State post code) Enter the post code established by the U.S. Department of State.

Description Enter the full name of the consulate office or country.

Setting Up Port of Entry Data

Access the Port of Entry Table page.



Port of Entry Table page

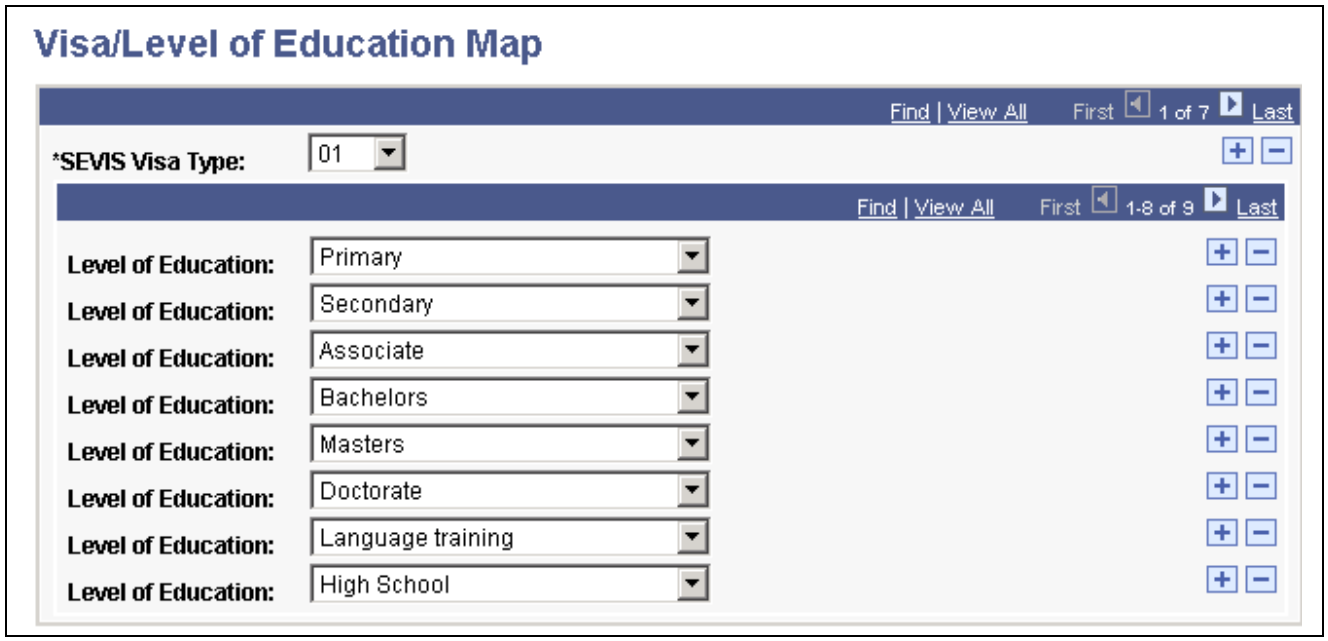
Note. The DHS defines the port of entry values in the lookup tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the port of entry codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

Port of Entry Enter the port of entry code for a particular U.S. port of entry.

Description Enter the full name of the U.S. port of entry.

Mapping SEVIS Visa Types to Levels of Education

Access the Visa/Level of Education Map page.



Visa/Level of Education Map page

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

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

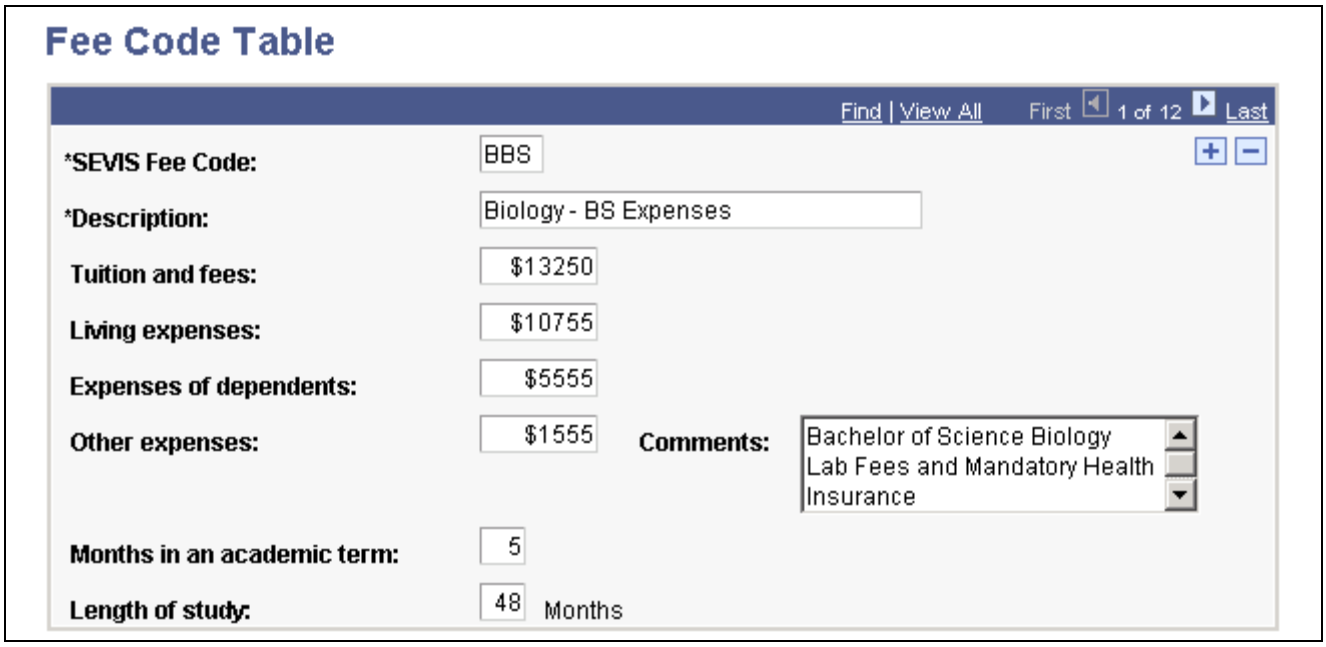
Note. The DHS defines the valid mappings and lists them in the Student Education Level Codes section of the *Lookup Tables for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the mappings from time to time. You must update or delete data to keep your system current with SEVIS.

SEVIS Visa Type Select the appropriate SEVIS visa type based on the DHS lookup tables.

Level of Education Select the values to allow for the indicated visa type classification.

Setting Up SEVIS Fee Codes

Access the Fee Code Table page.



Fee Code Table page

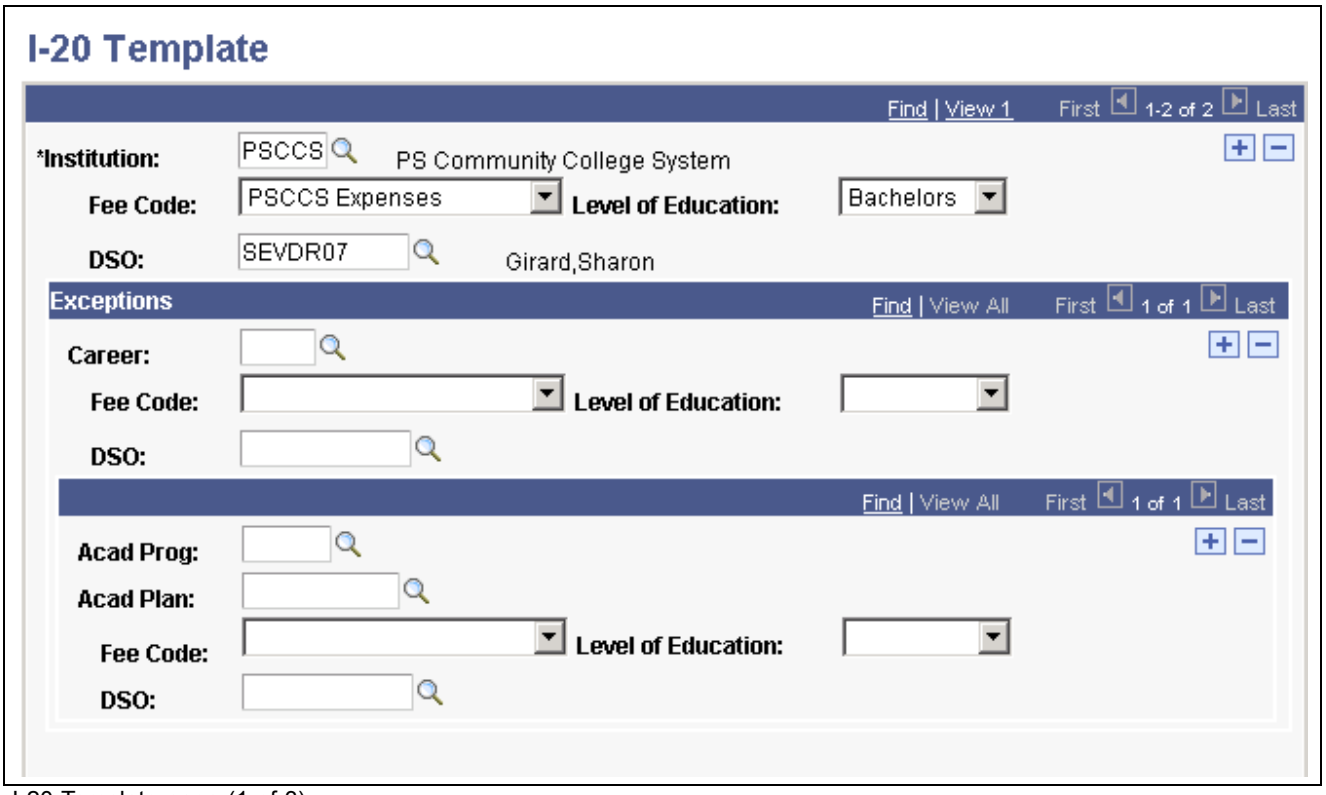
Data on this page is used on the F and M visas I-20 Template page and provides default values for populating the I-20 Form page.

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

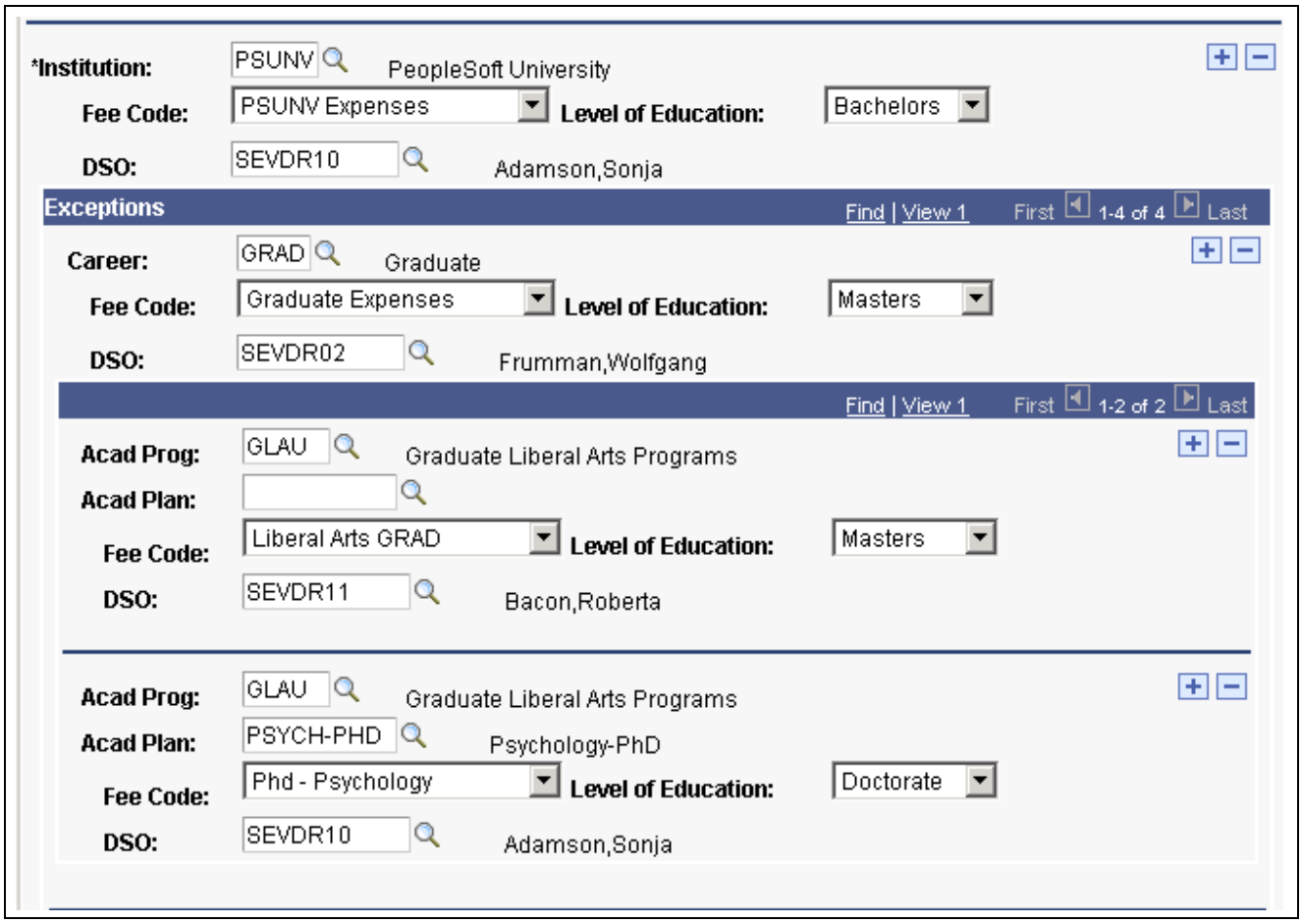
SEVIS Fee Code	Enter the fee code for the program.
Description	Enter the full name of the fee code.
Tuition and fees, Living expenses, Expenses of dependents, and **Other expenses**	Enter amounts for each of these expenses.
Comments	Add comments to describe the other expenses, if any.
Months in an academic term	Enter the number of months in an academic term associated with these expenses.
Length of study	Enter the number of months for the program associated with these expenses.

Creating an I-20 Form Template

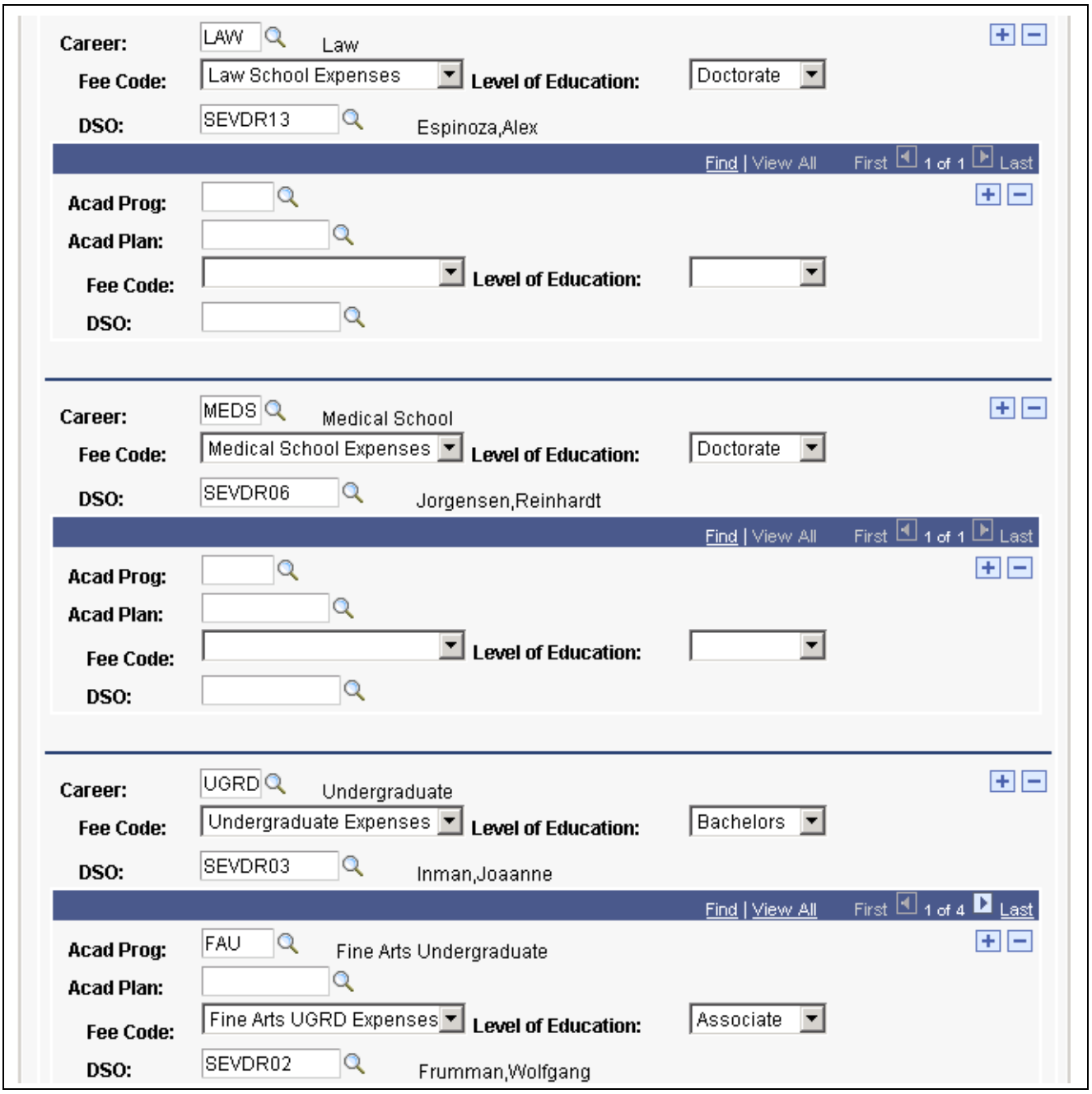
Access the I-20 Template page.



I-20 Template page (1 of 3)



I-20 Template page (2 of 3)



I-20 Template page (3 of 3)

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

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

Setting Up J Visas Processing

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

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

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

Pages Used to Set Up J Visas Processing

Page Name	Object Name	Navigation	Usage
Program Sponsor Table	SEV_PRG_SP_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table	Set up program sponsor and responsible officer information for exchange visitor J visas.
Site of Activity Table	SEV_SITE_ACT_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Site of Activity Table	Set up site of activity codes to use on the J visas DS-2019 form.
Program Sponsor Table 2	SEV_PRG_SP2_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table, Program Sponsor Table 2	Set up academic institution and academic career information for exchange visitor J visas. Specify the default site of activity.
SEVIS Program Sponsor Security	SEV_PRG_SP_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, SEVIS Pgm Sponsor Security	Set J visa program sponsor security access for an individual.
International Organizations	SEV_INT_ORG_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, International Orgs Table	Reference the international organization information to use on the J visas DS-2019 form.
US Government Agency Codes	SEV_AGEN_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, US Government Agency Code Tbl	Reference the U.S. government agency information to use on the J visas DS-2019 form.
Position Code Table	SEV_POS_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Position Code Table	Reference the position codes to use on the J visas DS-2019 form.
J Visa Termination Reasons	SEV_EV_TERM_RSN	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, J Visa Termination Reasons	Set termination reasons to use for J visas termination exchange visitor events.

Setting Up Program Sponsors

Access the Program Sponsor Table page.

Program Sponsor Table page

Program Sponsor Information

Enter the program number assigned by SEVIS to access this page. Then enter information to match the information that you record in the SEVIS RTI (Real Time Interface) for your program sponsor certification. The data that you enter is for internal purposes and appears in display-only mode on the DS-2019 form pages.

Sponsored by Enter the name of the program sponsor.

Described as Enter the description for the program sponsor.

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

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

ARO/RO

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

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

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

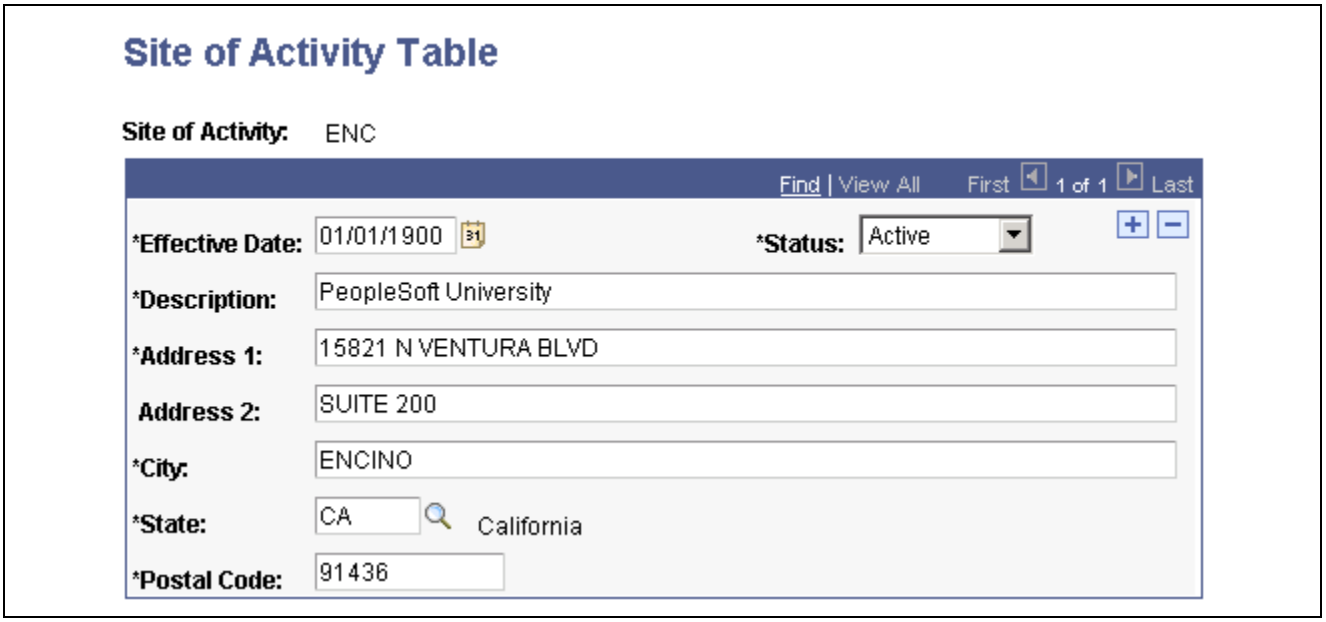
See Chapter 24, "Managing Identification Data," Entering External System IDs, page 280.

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

You must select one person as the RO to be able to save the information on this page.

Setting Up Site of Activity Codes

Access the Site of Activity Table page.



Site of Activity Table page

Note. PeopleSoft stores up to the ninth digit of the U.S. postal code in SEVIS Master to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in SEVIS Master. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run the export and alerts processes, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the processes ignores everything after the ninth digit.

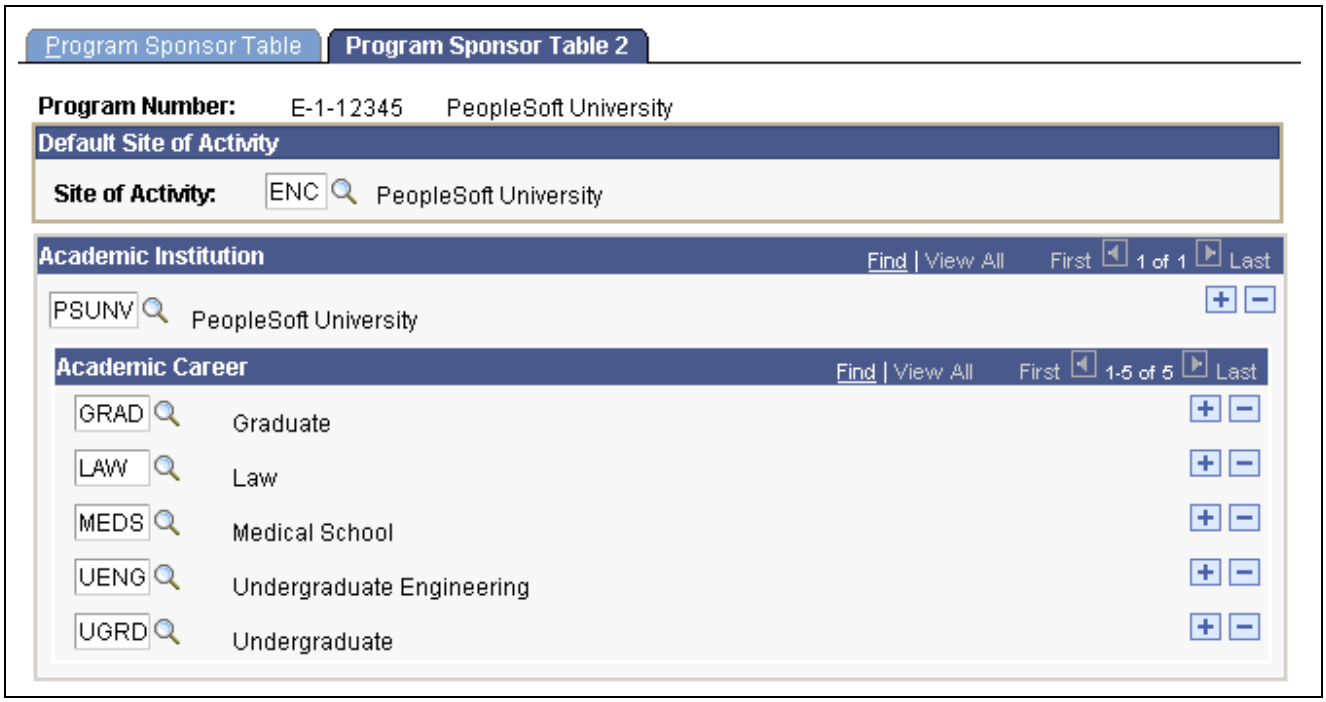
Enter information to identify the sponsor site of activity.

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

Note. Do *not* change the Site of Activity description after it has been defined. SEVIS processes the Add Site of Activity and Delete Site of Activity events based on matching the site of activity descriptions.

Defining the Default Site of Activity

Access the Program Sponsor Table 2 page.



Program Sponsor Table 2 page

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

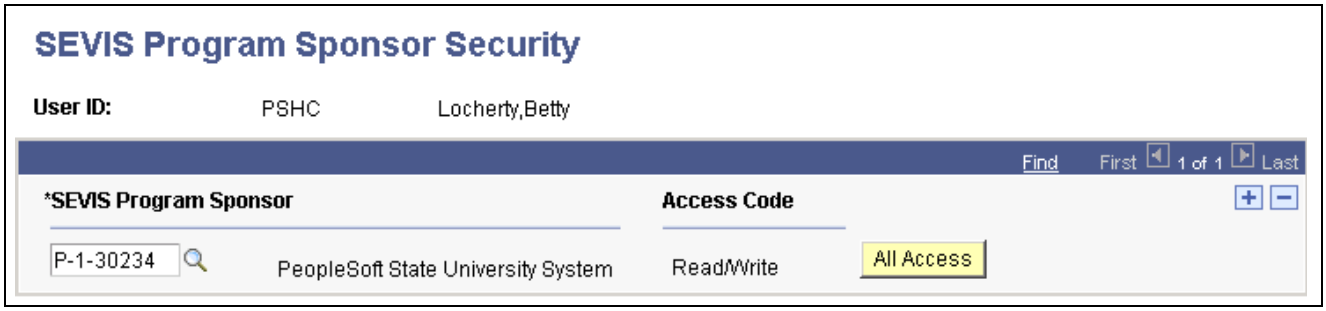
Site of Activity Select the site of activity to use as the default value when adding a new DS-2019 form.

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

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

Setting Up Program Sponsor Security

Access the SEVIS Program Sponsor Security page.



SEVIS Program Sponsor Security page

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

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

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

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

Setting Up International Organization Codes

Access the International Organizations page.

International Organizations page

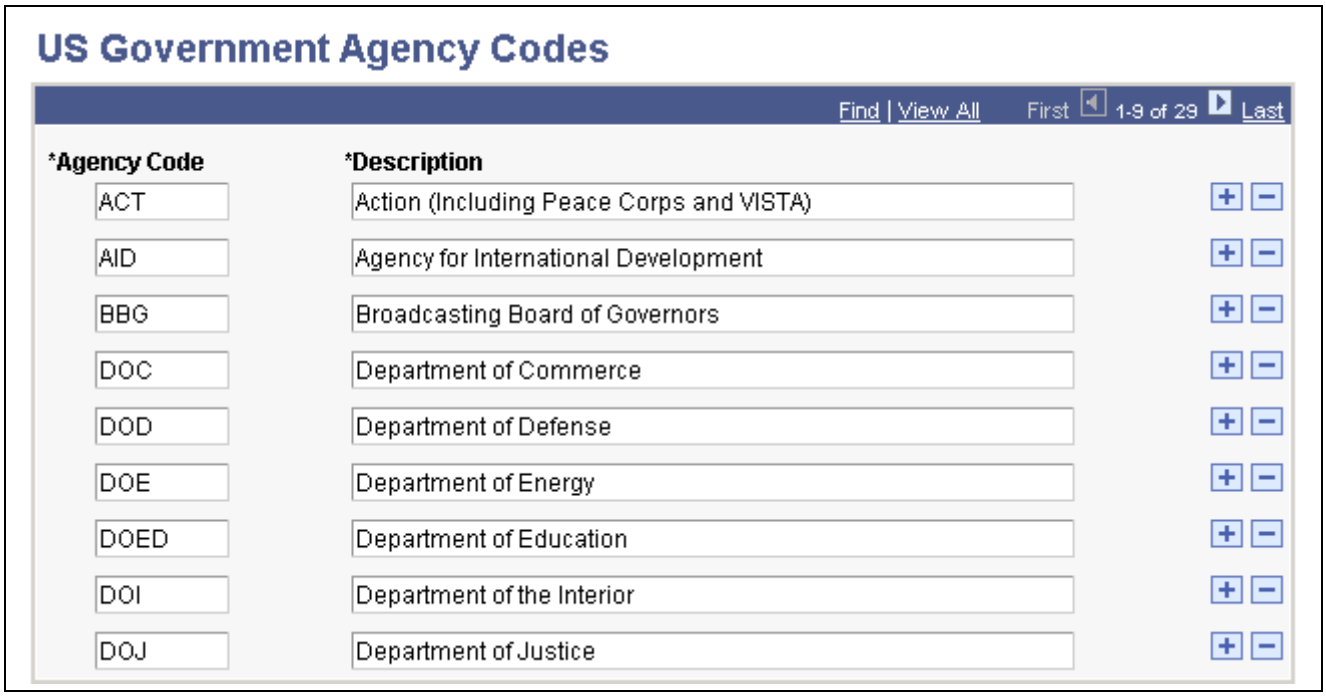
Note. The DHS defines the U.S. government agency codes that are delivered in the Lookup Tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the international organization codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

Organization Code Enter the DHS code for the international organization that provides funding for exchange visitors.

Description Enter the full name of the DHS international organization.

Setting Up U.S. Government Agency Codes

Access the US Government Agency Codes page.



US Government Agency Codes page

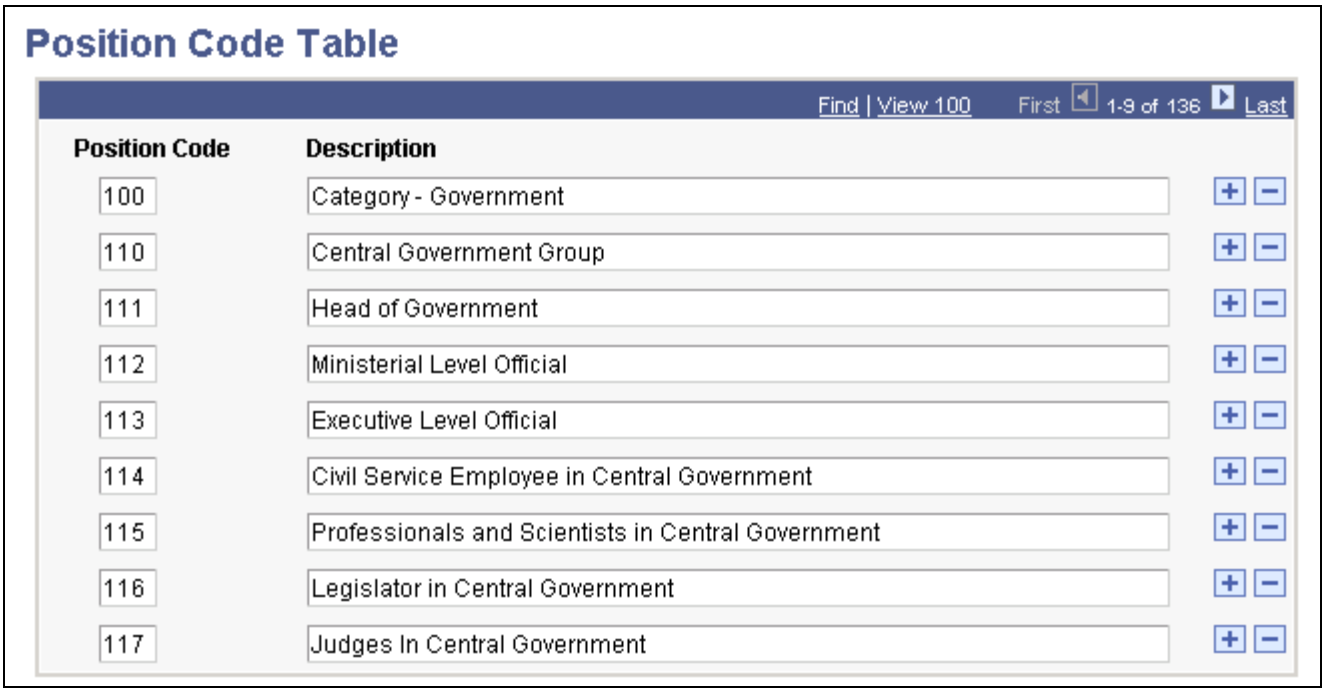
Note. The DHS defines the agency codes that are delivered in the Lookup Tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the agency codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

Agency Code Enter the DHS code for the U.S. government agency that provides funding for exchange visitors.

Description Enter the full name of the DHS U.S. government agency.

Setting Up Position Codes

Access the Position Code Table page.



Position Code Table page

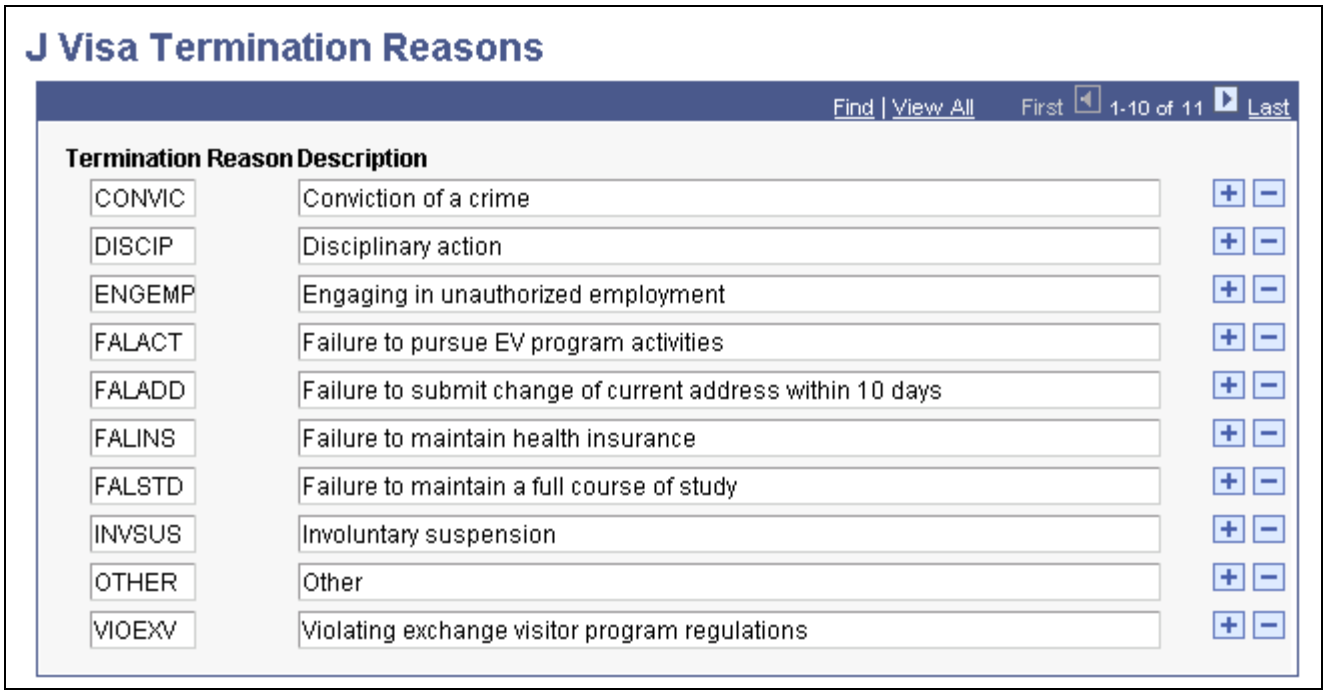
Note. The DHS defines the position codes that are delivered in the Lookup Tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update the position codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

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

Description Enter the full name of the DHS position.

Setting Up Exchange Visitor Termination Reasons

Access the J Visa Termination Reasons page.



J Visa Termination Reasons page

Note. The DHS defines the termination reason codes that are delivered in the Lookup Tables section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document. The DHS may update these codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

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

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

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

Setting User Defaults for Visa Processing

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

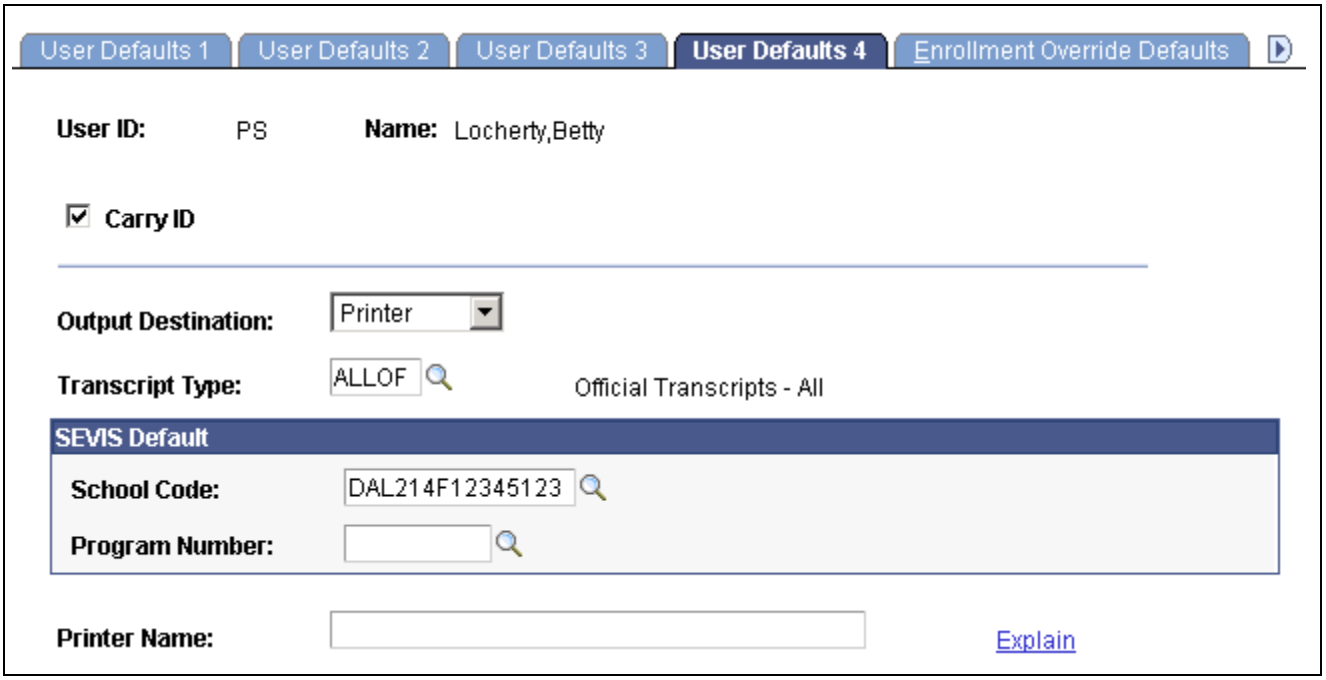
This section discusses how to set up visa processing user defaults for an individual.

Page Used for Setting User Defaults Visa Processing

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

Setting School Code or Program Sponsor User Defaults

Access the User Defaults 4 page.



User Defaults 4 page

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

SEVIS Default

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

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

School Code Enter the DHS SEVIS school code for this ID to use as the default value when processing F and M student visas.

Program Number Enter the DHS SEVIS exchange visitor program sponsor number for this ID to use as the default value when processing exchange visitor J visas.

See Also

Chapter 2, “Designing Campus Community,” Reviewing or Defining Campus Community Installation Settings, page 6

CHAPTER 7

Setting Up Service Indicators

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

- Set up service impacts.
- Set up service indicator codes and reasons.

See Also

Chapter 27, "Managing Service Indicators," page 313

Understanding Service Indicator Setup

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

Setting up service indicators consists of these steps:

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

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Tracking Student Data," Using Student Records Service Impacts

Setting Up Service Impacts

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

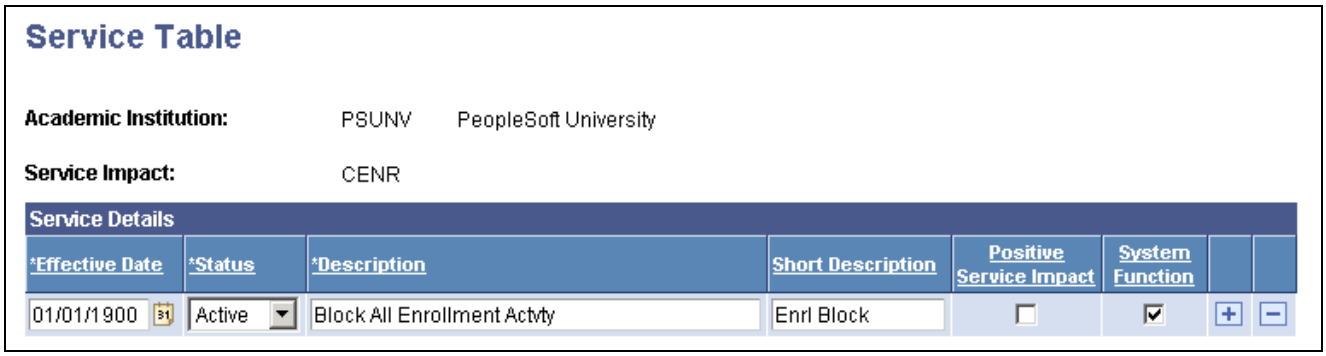
This section discusses how to define service impact codes.

Page Used to Set Up Service Impacts

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

Defining Service Impact Codes

Access the Service Table page.



Service Table page

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

- AENR
- CENR
- ENVER
- IENR

These service impacts each have a unique usage within the system.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Tracking Student Data," Using Student Records Service Impacts.

Service Details

Positive Service Impact Select this check box to indicate that the impact provides a service (as opposed to denying or restricting one).

System Function Select this check box to identify the service impact as one called by PeopleSoft program logic. For example, you must define the *CENR* service impact and select this check box for it, for each institution in your system because it is used by enrollment process logic.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Tracking Student Data," Using Student Records Service Impacts.

Setting Up Service Indicator Codes and Reasons

To set up service indicator codes and reasons, use the Service Indicator Table component (SERVICE_IND_CD_TBL).

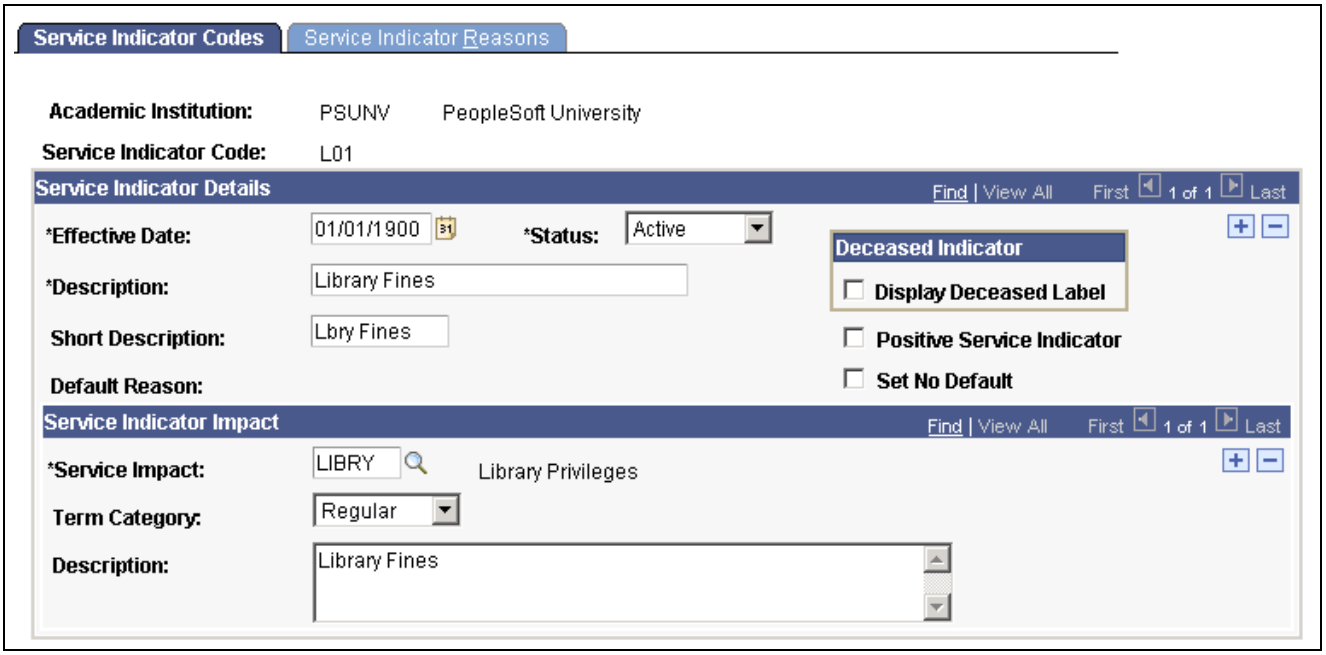
This section discusses how to create service indicator codes and reasons.

Page Used to Set Up Service Indicator Codes and Reasons

Page Name	Object Name	Navigation	Usage
Service Indicator Codes	SRVC_IND_CD_TABLE	Set Up SACR, Common Definitions, Service Indicators, Service Indicator Table	Create service indicator codes for positive and negative service indicators.
Service Indicator Reasons	SRVC_IND_RSN_TABLE	Set Up SACR, Common Definitions, Service Indicators, Service Indicator Table, Service Indicator Reasons	Define and associate reasons for a service indicator.

Creating Service Indicator Codes

Access the Service Indicator Codes page.



Service Indicator Codes page

Service Indicator Details

Default Reason Displays the default reason associated with the service indicator.

Note. The system cannot display the default reason until the reason is defined and associated with the service indicator on the Service Indicator Reasons page.

Positive Service Indicator Select this check box to indicate that the service indicator identifies a privilege or service to be provided.

For example, if you define a positive service indicator of *Conference Guest* and associate the service impact of *Front of Line,* then any person assigned the Conference Guest service indicator should receive front-of-line service at your institution.

Set No Default Select this check box to prevent the system from displaying default values in the Service Indicator Reason Code and Department fields on the Service Indicators page.

Deceased Indicator

Display Deceased Label Select this check box to display the word *DECEASED* at the top of pages about individuals to whom the indicator is assigned in the future.

Warning! Select the Display Deceased Label check box *only* when creating a death service indicator. Selecting this for any other service indicator could cause the system to apply the deceased label to individuals who are not deceased. If this happens, substantial manual effort might be required to remove the deceased designation from each individual's record.

Service Indicator Impact

Service Impact Enter the service that is either restricted or provided by this service indicator.

Term Category Select the single term category for which the service impact is valid.

If you do not specify a term category, the service impact becomes valid for all terms.

Values for this field are delivered with your system as translate values. You can modify these translate values.

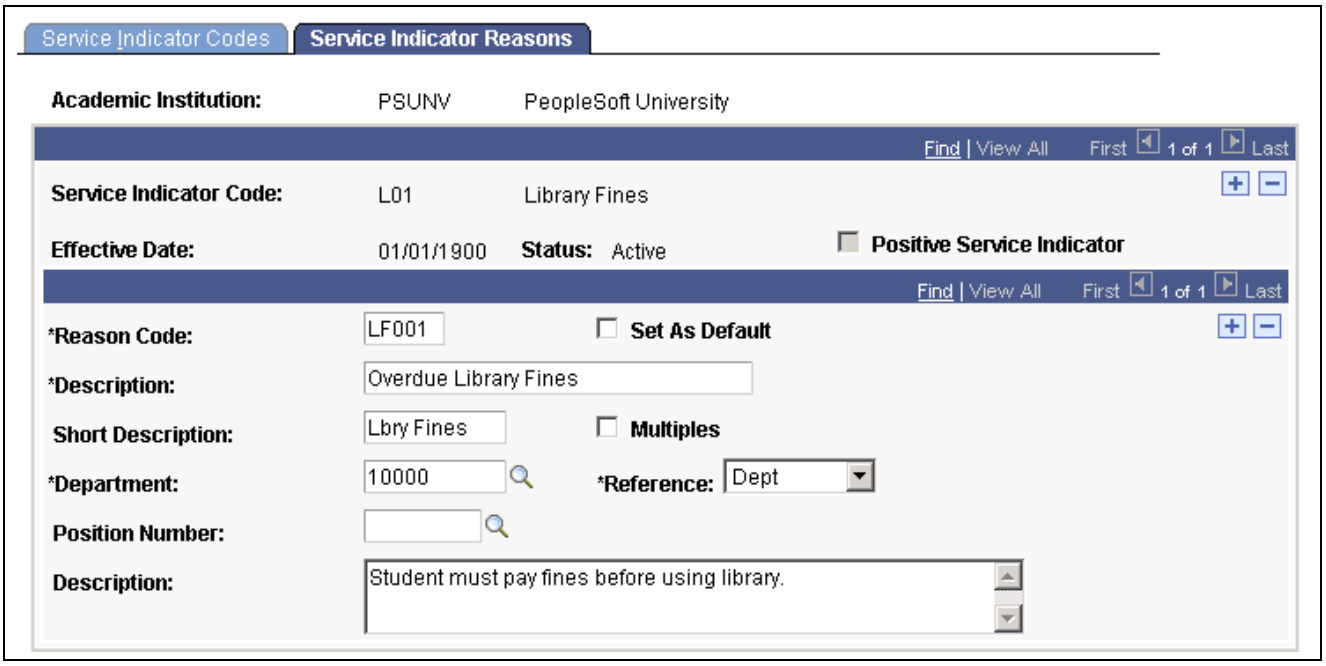
Description Enter comments to further describe or identify the service impact as it relates to this service indicator.

See Also

Chapter 27, "Managing Service Indicators," Assigning or Removing Service Indicators, page 314

Defining and Associating Service Indicator Reasons

Access the Service Indicator Reasons page.



Service Indicator Reasons page

Positive Service Indicator When selected, indicates that the service indicator identifies a privilege or service to be provided (as opposed to denied or restricted).

Reason Code Enter a code for the service indicator reason that you are creating.

Set As Default Select this check box to associate this reason with the service indicator. You can select only one default reason for each service indicator.

When you save the page, the system displays this reason beside the Default Reason field label on the Service Indicators Codes page. When you assign the service indicator on the Service Indicator Data 1 page, the system displays this as the default reason (unless the Set No Default check box next to the Default Reason field on the Service Indicators Codes page is selected, in which case, no default reason appears).

Multiples Select this check box to permit the assignment of multiples of this service indicator to the same student.

For example, if a student has many overdue library fines, selecting this option allows the service indicator to be entered for each fine.

Department Enter the department at your institution, from the Department Table page, that is responsible for this service indicator.

Reference Select the type of entity *(Department, Department and Instructor,* or *Department Bill # and Instructions)* that identified the need for this service indicator.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Position Number Enter the ID of the person or office that identified the need for this service impact.

Instructions Enter comments or instructions to further describe or define this service indicator reason, or to identify what an individual must do to qualify for the removal of a negative service indicator.

The text that you enter here appears as the instructions for this hold on the Holds page in PeopleSoft Enterprise Campus Self Service.

See Also

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Self-Service Campus Personal Information," Using Self-Service Service Indicators Data

CHAPTER 8

Setting Up FERPA Privacy Control

The FERPA privacy control functionality is named for the U.S. Family Educational Rights and Privacy Act regulation. However, anyone can use the functionality to set privacy controls in PeopleSoft Enterprise Campus Solutions.

This section provides an overview of FERPA privacy control and discusses how to:

- Make data available for FERPA privacy control.
- Make publications available for privacy exceptions.

Understanding FERPA Privacy Control

To comply with FERPA, you must, at minimum, make directory information available for privacy control. You must review the FERPA_VW records in your system and configure them to reflect the type of information that your institution uses as directory information.

The fields shipped on each FERPA_VW record that is delivered with your system, are examples of that type of directory information.

Note. No examples are shipped for the extracurricular activities view record (ACTVTS_FERPA_VW).

If the shipped examples do not reflect your institution's directory information, you should modify the relevant FERPA_VW records and other objects to adjust the data accordingly.

You can specify additional fields on existing FERPA_VW records to include more information within the same FERPA-controlled category (address, names, personal information, and so on).

You can also use PeopleSoft Application Designer (see your PeopleTools documentation) to do the following:

Create and add new FERPA_VW records to add new categories to your system's FERPA control. You must create a FERPA_VW record for each new category and modify the following to accommodate the new record:

- Records whose names start with FERPA.
- Views whose names end with FERPA_VW.
- PeopleCode attached to FERPA pages, including:
  - DERIVED_CS.FERPA_FLAG.FCH
  - DERIVED_CS.FERPA_PB.FCH
  - FUNCLIB_CS.FERPA_FLAG.FFO
  - PERSONAL_DATA.FERPA.RIN

Remove a field from the FERPA pages. You must also modify the view text on the appropriate pages.

- Use a SQL query tool or write an SQR program to remove all occurrences of the value from the field on the FERPA_OVERRIDE data (DELETE FROM PS_FERPA_OVERRIDE WHERE FIELDNAME=’SEX’).
- Remove the field from all other FERPA-related pages.
- Use Application Designer to remove the value from FERPA control.

Warning! Removing name, address, phone, and email fields from FERPA views will affect the directory listings in PeopleSoft Enterprise Campus Self Service Community Directory. You might need to modify the directory load process.

See Also

Chapter 26, “Managing FERPA Privacy Control,” page 299

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, “Using Community Directory Search”

Making Data Available for FERPA Privacy Control

To set up FERPA control, use the FERPA Control component (FERPA_CONTROL).

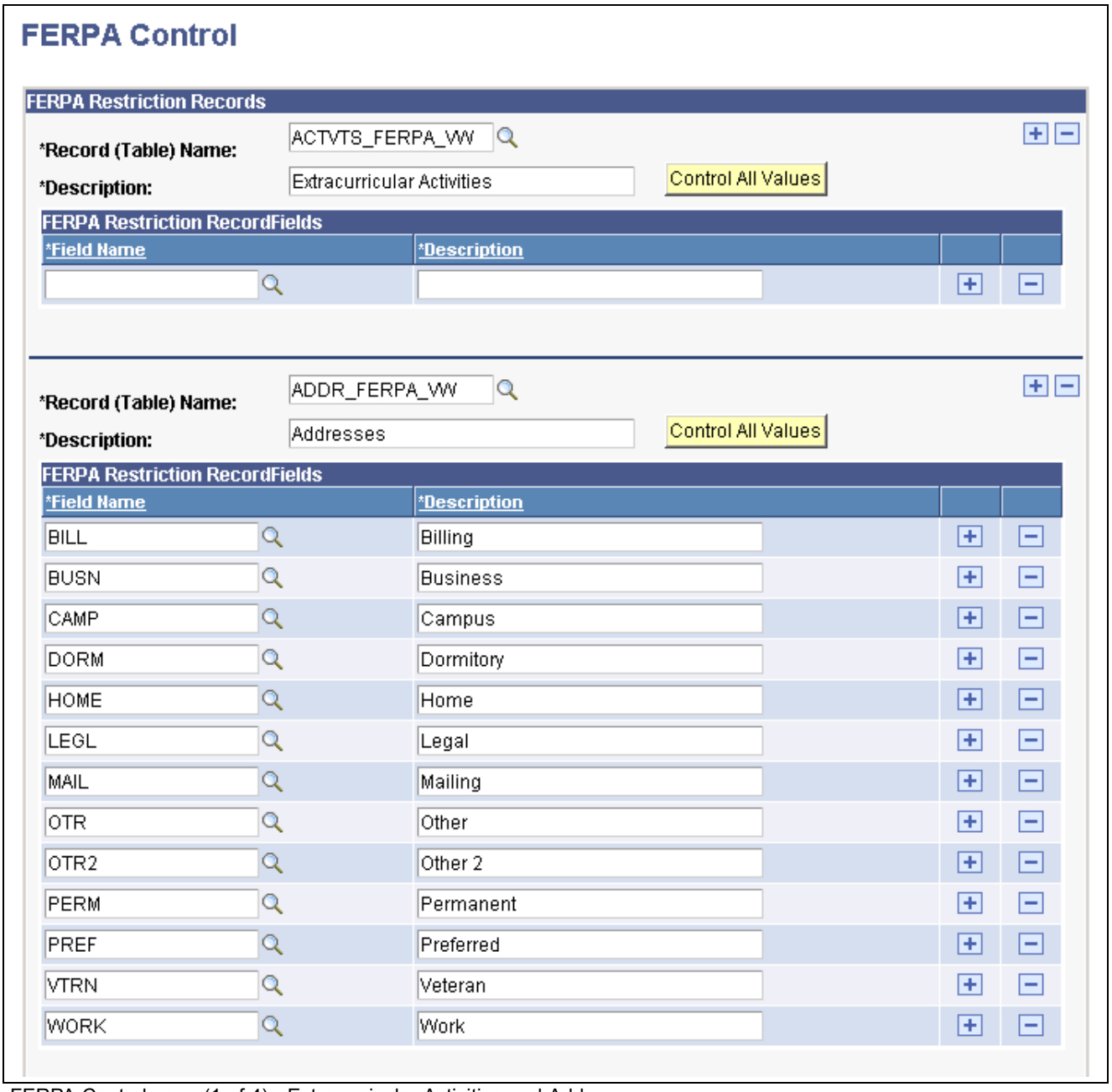
This section discusses how to make data available for FERPA privacy control.

Page Used to Make Data Available for FERPA Privacy Control

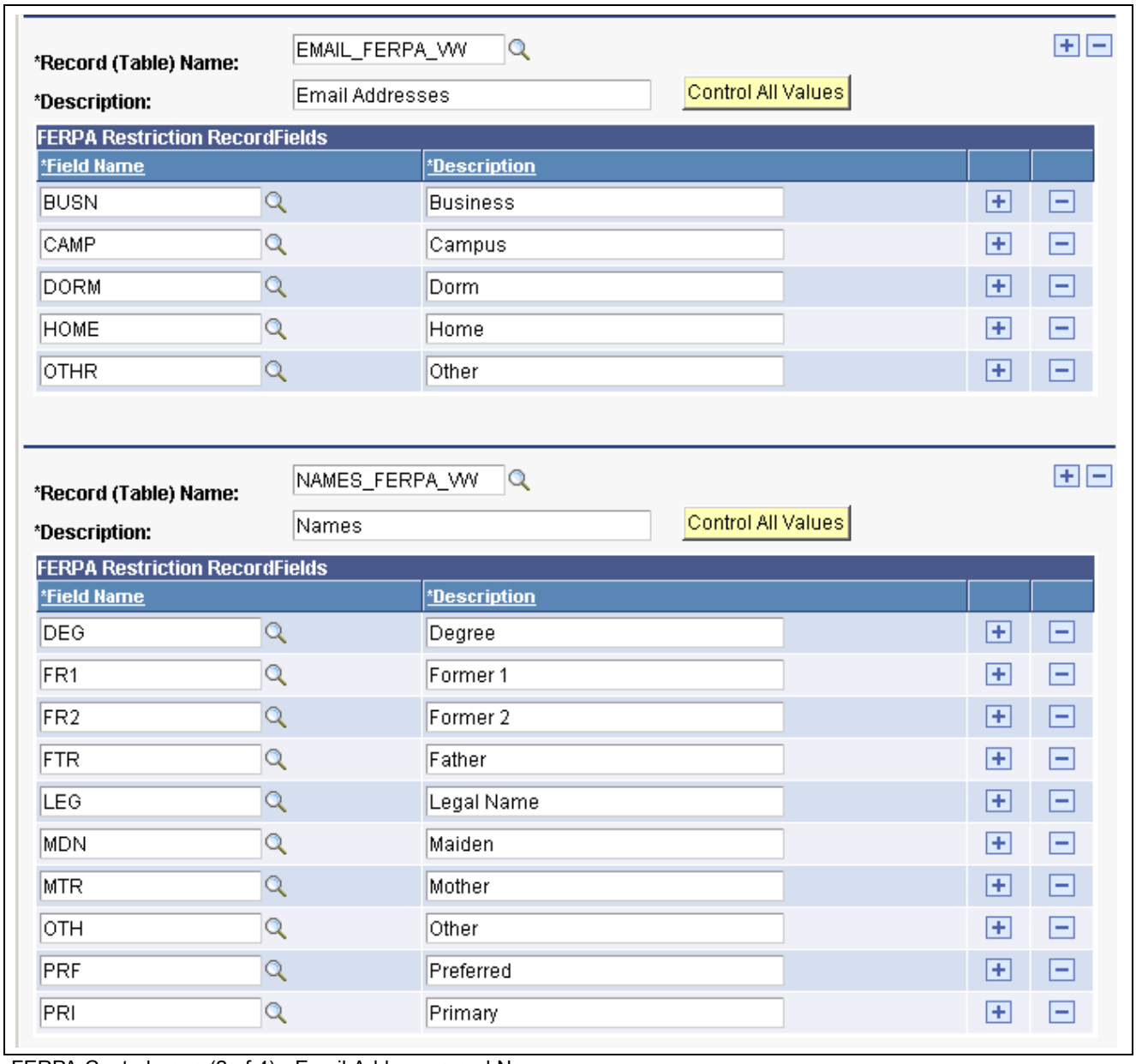
Page Name	Object Name	Navigation	Usage
FERPA Control	FERPA_CONTROL	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, FERPA Control	Review or make additional directory data and other information available to FERPA privacy control.

Setting Data for FERPA Privacy Control

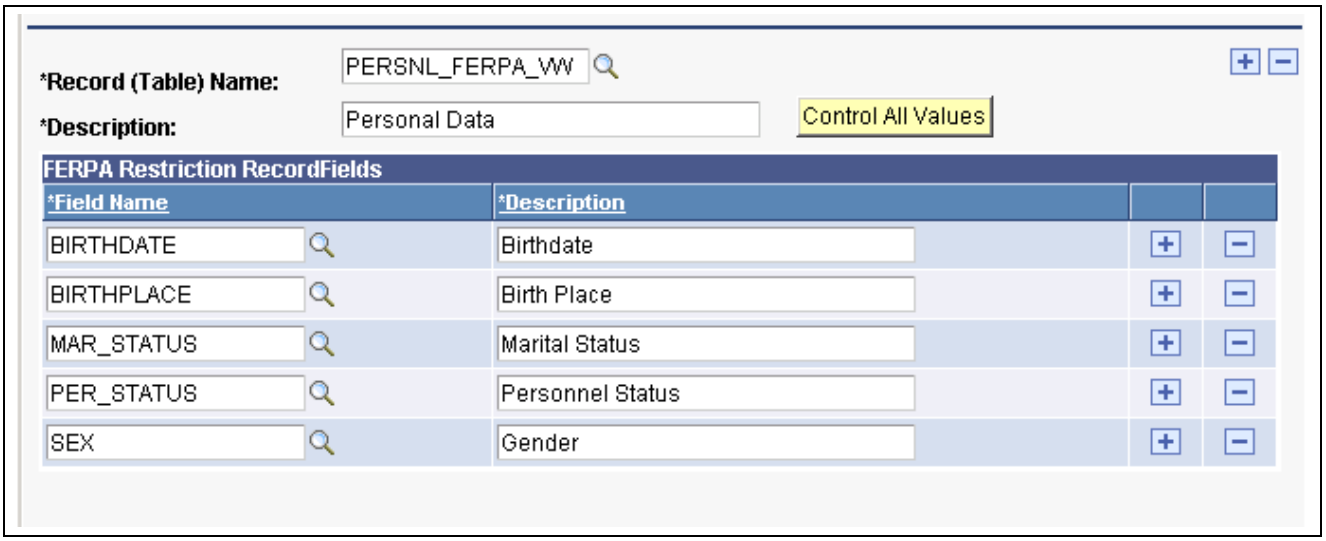
Access the FERPA Control page.



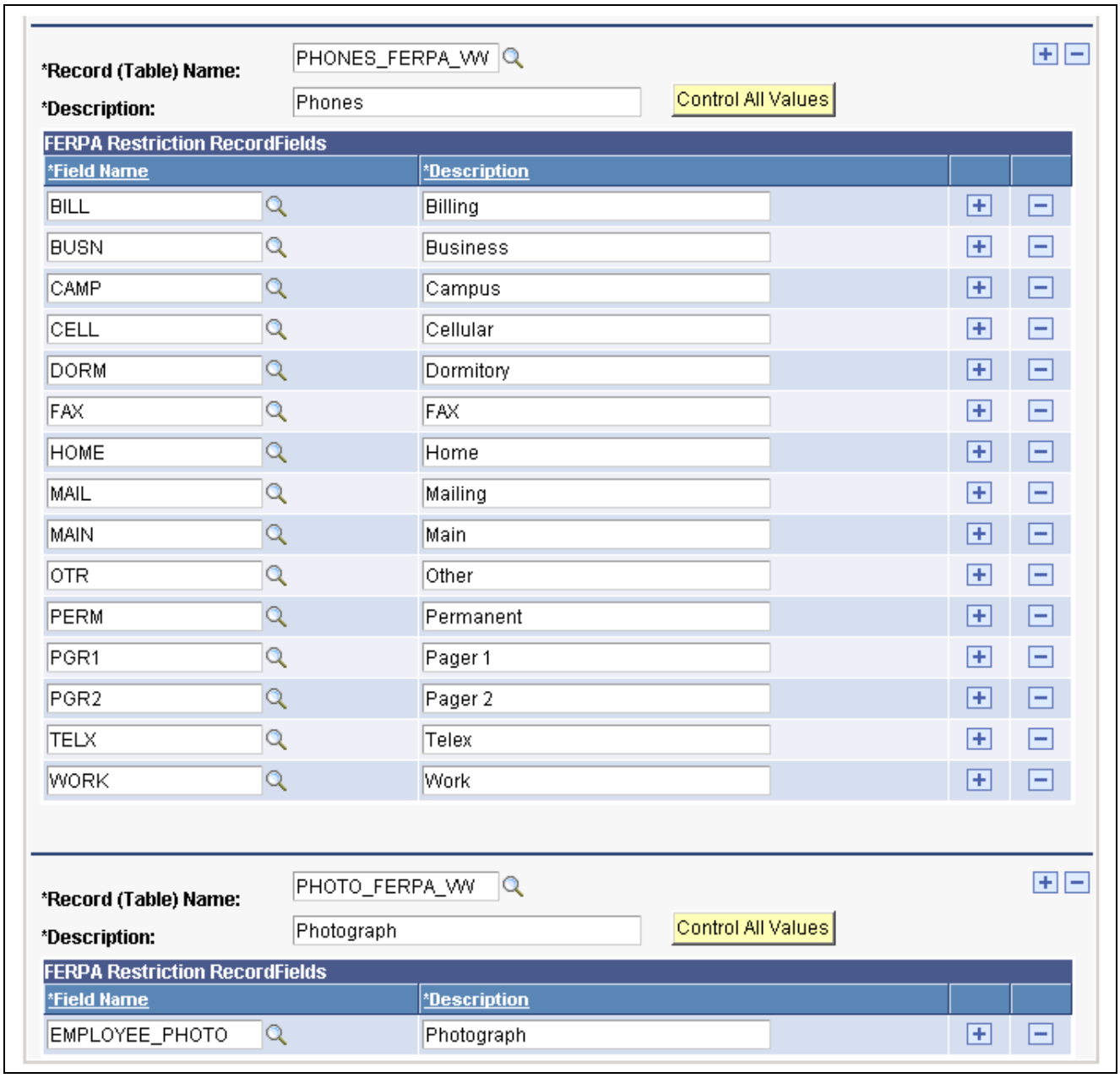
FERPA Control page (1 of 4) - Extracurricular Activities and Addresses



FERPA Control page (2 of 4) - Email Addresses and Names



FERPA Control page (3 of 4) - Personal Data



FERPA Control page (4 of 4) - Phones and Photograph

FERPA Restriction Records

Record (Table) Name Enter the FERPA view record that contains the type of information that your institution uses for directories or that contains additional information that your institution wants to make available for privacy control.

The FERPA_VW records available are defined on the CC_FERPA_SEL_VW record. You can modify the view records.

Description The system displays the description of FERPA_VW record that you entered.

Control All Values Click this button to display all of the type-based controlled fields (address, phone, name, and email) from the selected record and make them available for privacy control.

FERPA Restriction RecordFields

Field Name Enter the name of the field, from the FERPA_VW record, that contains the information to make available for privacy control.

When you select the record (table) name, the fields on that record become available here. If you click the Control All Values button, the system displays all the type-based controlled fields (valid for address, phone, name, and email only). You can delete and add fields to configure them to your institution's needs.

Description The system displays the description of each field from the FERPA_VW record. You can modify the descriptions here.

These descriptions appear on the FERPA self-service page in PeopleSoft Enterprise Campus Self Service. If you implement FERPA self-service, you might want to modify these descriptions.

Making Publications Available for Privacy Exceptions

To make publications available for privacy exceptions, use the Institution Publications component (INST_PUB_TBL) and the Publication Categories component (INST_CATG_TBL).

This section provides an overview of making publications available for FERPA exceptions and discusses how to:

- Create publication codes
- Define publication categories

Understanding Publications as Privacy Control Exceptions

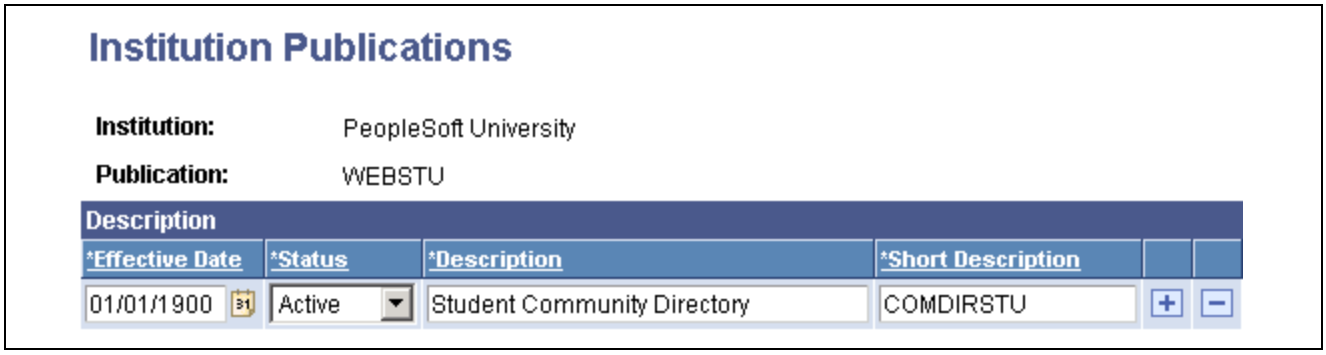
You can make publication categories available for exceptions to FERPA privacy restrictions. Students can then elect to permit your institution to release otherwise restricted data for publication in certain types of publications created for your institution. For example, a student might restrict the release of her name, home address, and phone number but permit you to include it in your internal student community directory.

Pages Used to Make Publications Available for Privacy Control Exceptions

Page Name	Object Name	Navigation	Usage
Institution Publications	INST_PUB_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Institution Publications	Create or review codes for each of your institution's publications.
Publication Categories	INST_CATG_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Publication Categories	Organize your institution's publications into categories that you can make available for exception to an individual's FERPA restrictions.

Creating Publication Codes

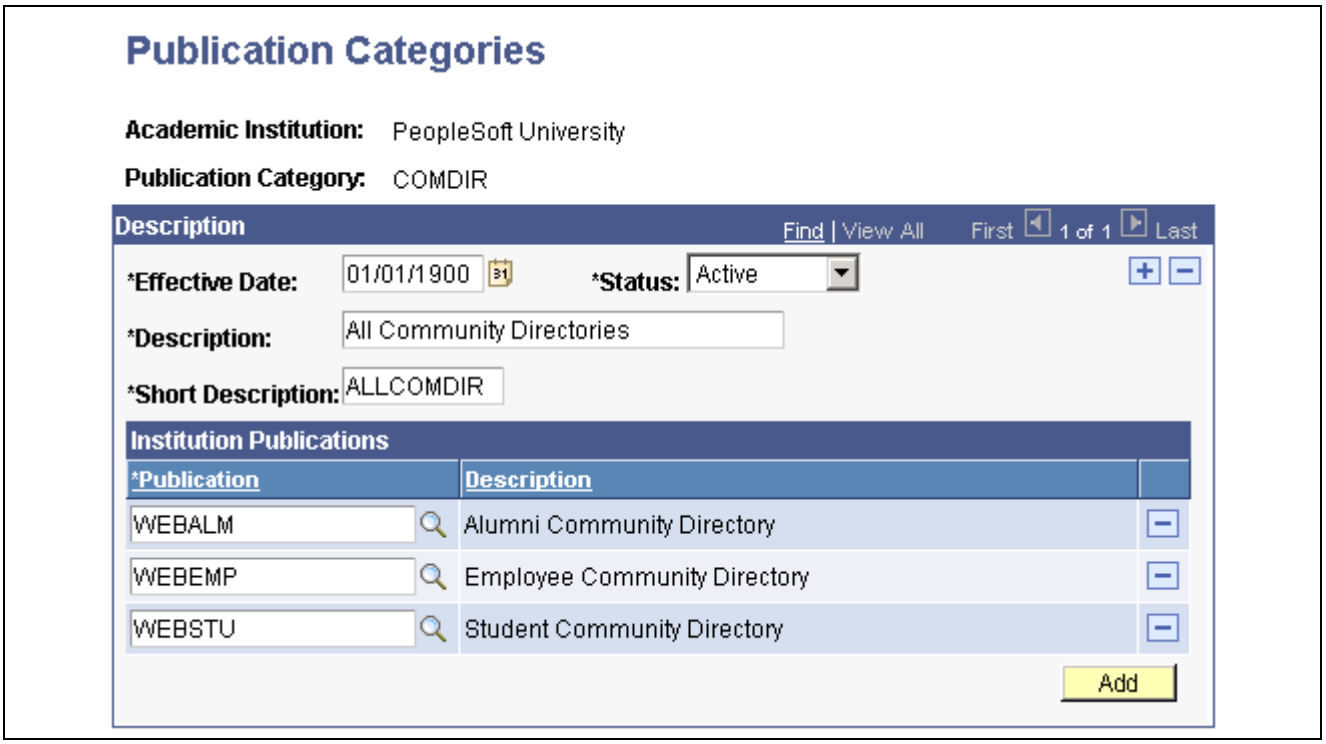
Access the Institution Publications page.



Institution Publications page

Defining Publication Categories

Access the Publication Categories page.



Publication Categories page

Description

Description Enter the description of the publication category.

Two publication categories are delivered with your system: *All Community Directories* and *Student Community Directories*. These are used in PeopleSoft Campus Solutions Self Service. You can add new categories and add publications to the delivered categories, but do *not* delete the delivered categories.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Community Directory Search".

Institution Publications

Publication Enter the code for the specific publication in this category.

You can add publications to this category on the Institution Publications page.

CHAPTER 9

Setting Up Identification Data

This chapter discusses how to:

- Set up citizenship and passport data.
- Set up visa and permit data.
- Set up residency data.

Note. No specific setup is required for driver license data, external system ID, photos, or personal identification numbers (PINs).

See Also

Chapter 24, "Managing Identification Data," page 273

Setting Up Citizenship and Passport Data

See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Setting Up Visa and Permit Data

See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Setting Up Residency Rules

To set up residency rules, use the Residency Table (RESIDENCY_TABLE) component and Residency Exception Table (RESID_EXCPT_TABLE) component.

This section discusses how to:

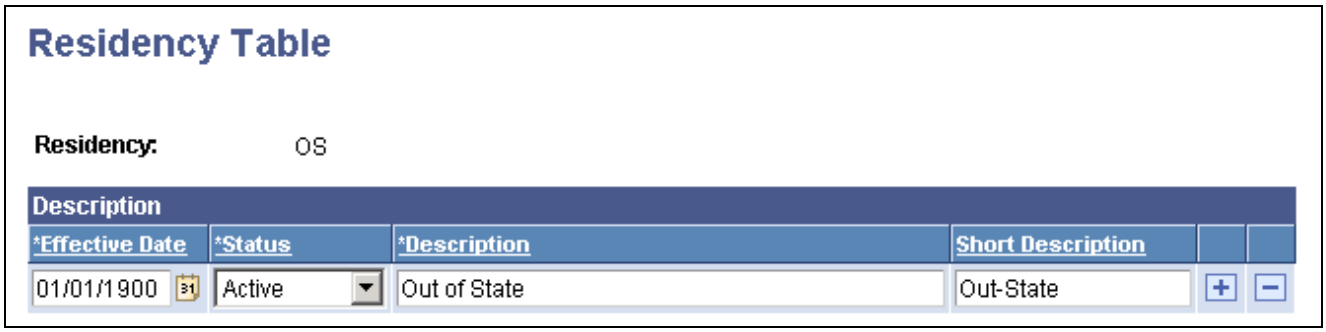
- Define residency rules.
- Define residency rule exceptions.

Pages Used to Set Up Residency Rules

Page Name	Object Name	Navigation	Usage
Residency Table	RESIDENCY_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Table	Define codes for residency rules.
Residency Exception Table	RESID_EXCPT_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Exception Table	Define codes residency rule exceptions.

Defining Residency Rules

Access the Residency Table page.

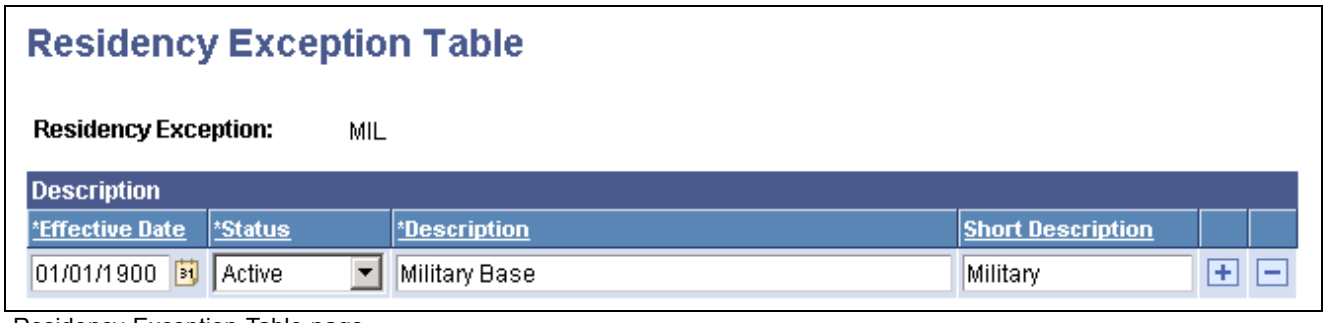


Residency Table page

Enter information to describe the residency code that you want to create.

Defining Residency Rule Exceptions

Access the Residency Exception Table page.



Residency Exception Table page

Enter information to describe the residency exception code that you want to create.

CHAPTER 10

Setting Up Health Data

This chapter discusses how to:

- Set up physicians.
- Set up diagnosis codes.
- Set up accommodations.
- Set up immunization and health test types.

See Also

Chapter 23, "Managing Health Information," page 255

Setting Up Physicians

You can set up physicians (including addresses and phone numbers) in your database so that they are available to reference when tracking health data.

See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Setting Up Diagnosis Codes

You can set up codes to identify injuries and illnesses and use them to monitor health and safety incidents. Physicians often use standard terminology to describe the results of their examinations. You can set up the same standard codes, such as those that the American Medical Association has established, or enter your own institution-specific codes.

See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Setting Up Accommodations

You can set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities, such as purchasing special equipment or making structural changes to a classroom or work environment. You can use these codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and the party who is responsible for them.

Note. Several fields on the Accommodations pages—Regulatory Region, Job Code, Job Location, and Job Code Tasks—are defined on pages from the HRMS job attributes menus. If your institution uses PeopleSoft Enterprise HRMS, read the HRMS documentation to determine how those items are used there. Use shared accommodation fields as needed.

See Chapter 2, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11.

Setting Up Immunization and Health Test Types

To set up immunization test types, use the Immunization Table component (IMMUNIZATION_TABLE). To set up health test types, use the Health Test Table component (HEALTH_TST_TABLE).

Set up codes to identify the immunization and general health tests that your institution requires or that students typically choose to report. You can use these codes to record and track an individual's immunization and general health test data.

This section discusses how to:

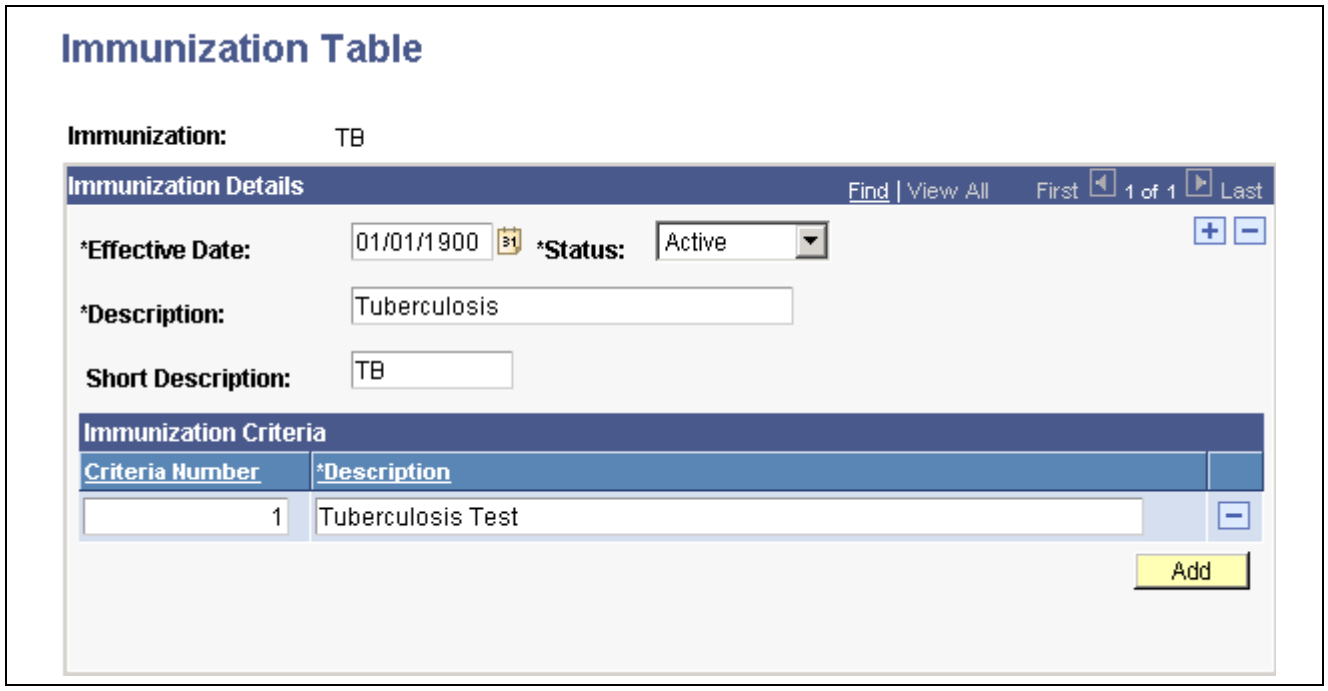
- Define immunization test codes.
- Define health test codes.

Pages Used to Set Up Immunization and Health Test Codes

Page Name	Object Name	Navigation	Usage
Immunization Table	IMMUNIZATION_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Immunization Table	Define or review codes for immunization tests.
Health Test Table	HEALTH_TST_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Health Test Table	Define or review codes for health tests.

Defining Immunization Test Codes

Access the Immunization Table page.



Immunization Table page

Immunization Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with this immunization. These fields are optional.

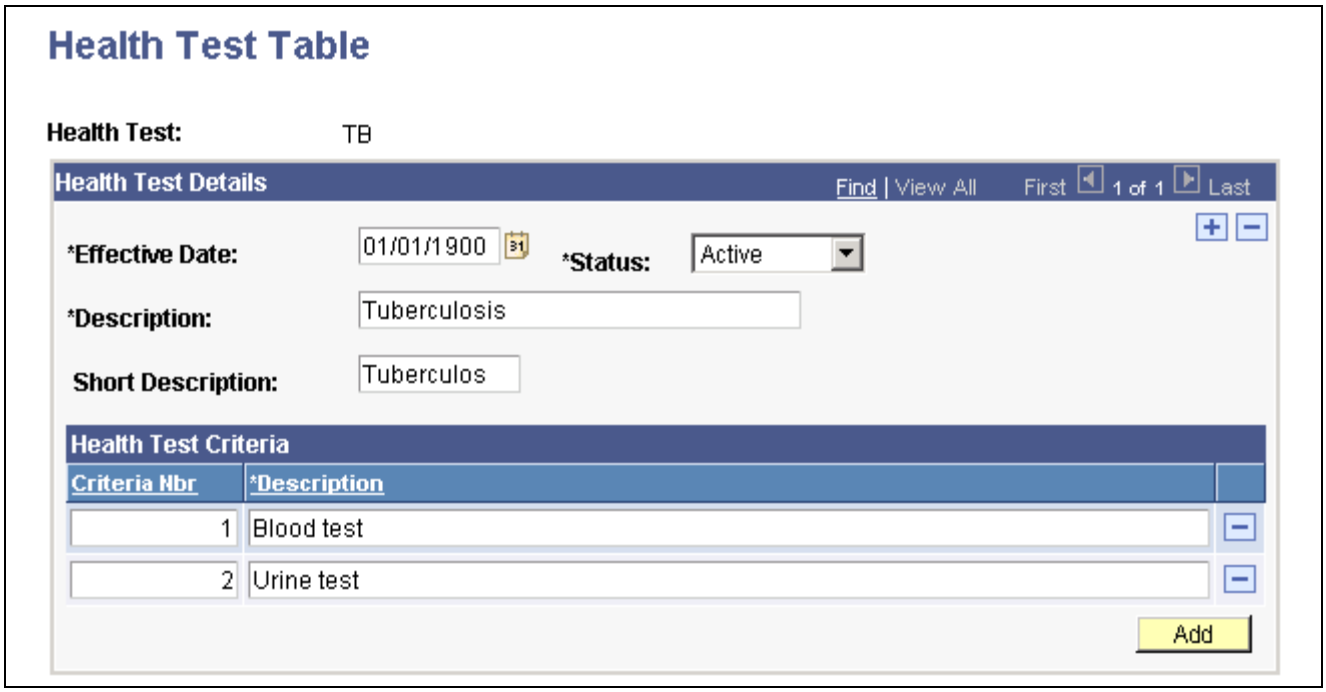
Criteria Number The system displays the number of the item on the list of criteria for the immunization.

The system displays the next sequential number for each item that you add. You can use these numbers as reference IDs for items in a randomly ordered list. Or, you can override them to reorder the list of items according to the order in which the events must occur.

Description Enter the description of the item or event.

Defining Health Test Codes

Access the Health Test Table page.



Health Test Table page

Health Test Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with a health test. These fields are optional.

Criteria Number The system displays the number of the item on the list of criteria for the health test.

The system automatically enters the next sequential number for each item that you add. You can use these as reference IDs for items in a randomly ordered list or override them to reorder the list of items according to the order in which the events must occur.

Description Enter the description of the item or event.

CHAPTER 11

Setting Up Participation Data

This section discusses how to:

- Set up athletic participation.
- Set up extracurricular activities.
- Set up honors and awards.
- Set up licenses and certificates.
- Set up memberships.

See Also

Chapter 25, "Managing Participation Data," page 289

Setting Up Athletic Participation

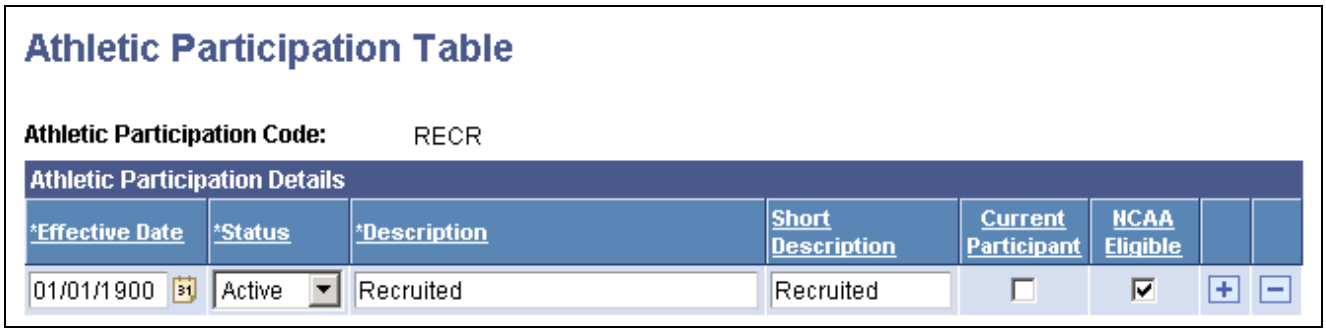
To set up athletic participation, use the Athletic Participation Table component (ATHL_PART_TABLE). This section discusses how to set up athletic participation codes.

Page Used to Set Up Athletic Participation

Page Name	Object Name	Navigation	Usage
Athletic Participation Table	ATHL_PART_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Athletic Participation Table	Set up or review athletic participation codes.

Defining an Athletic Participation Code

Access the Athletic Participation Table page.



Athletic Participation Table page

Current Participant Select this check box to set the default participation associated with this code to current participant.

NCAA Eligible(National Collegiate Athletic Association eligible) Select this check box to set the default participation associated with this code to a current eligibility to participate according to NCAA rules and regulations.

Setting Up Extracurricular Activities

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

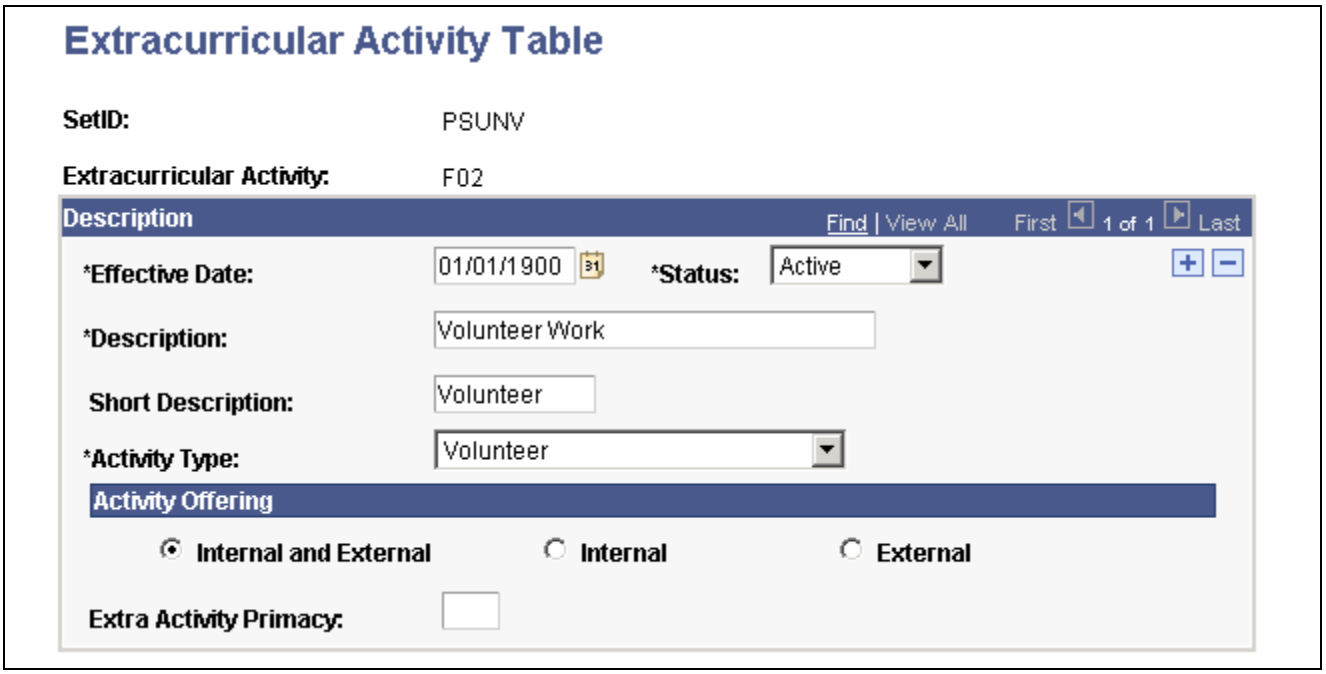
This section discusses how to set up extracurricular activity codes.

Page Used to Set Up Extracurricular Activities

Page Name	Object Name	Navigation	Usage
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Tbl	Set up or review the types of student activities to track.

Defining an Extracurricular Activity Code

Access the Extracurricular Activity Table page.



Extracurricular Activity Table page

Description

Activity Type Enter the type of activity (*Athletics, Student Government, Theater, Volunteer* and so on) that you are defining.

Activity type values are delivered with your system as translate values. You can modify these translate values if necessary.

Activity Offering

Internal and External Select this check box to indicate that this activity is offered within and outside of your institution.

Internal Select this check box to indicate that this activity is offered only within your institution.

External Select this check box to indicate that this activity is offered only outside of your institution.

Extra Activity Primacy Enter the number that describes the level of importance of this extracurricular activity. The lower the number the higher the importance.

For example, a primacy number of *1* indicates that this is a primary or most important activity. A primacy number of *10* indicates that this is an activity of much lesser importance.

Setting Up Honors and Awards

You can set up honors and awards and track them, whether earned internally or externally.

PeopleSoft Enterprise Student Records tracks honors and awards and uses them for transcripts and graduation.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing to Track Student Data," Setting Up Honors and Awards

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts"

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, Define Campus Community, Setup, Honors and Awards • Set Up SACR, Product Related, Student Records, Student Standing and Award, Honors/Awards Table	Set up internal and external honors and awards.

Setting Up Licenses and Certificates

You can set up licenses and certificates to track the achievements of individuals in your campus community.

See Chapter 2, "Designing Campus Community," Setting Up Licenses and Certificates, page 16.

Setting Up Memberships

You can set up memberships to identify the affiliations of individuals in your campus community.

See Chapter 2, "Designing Campus Community," Setting Up Memberships, page 16.

CHAPTER 12

Setting Up Organization Data

This chapter discusses how to:

- Define organization groups and contacts.
- Create or load external organization codes.
- Set up external subject categories and term sessions.

See Also

Chapter 34, "Adding Organizations to Your Database," page 511

Chapter 35, "Managing Organization Data," page 525

Chapter 36, "Loading External Organization Data," page 547

Defining Organization Groups and Contacts

To define organization groups and contacts, use the Organization Group Table component (ORG_GRP_CD_TABLE) and the Contact Type Table component (ORG_CNTCT_TYPE_TBL).

This section provides an overview of group types and discusses how to:

- Define organization group types.
- Define contact types.

Understanding Group Types

Group types and codes within each group type enable you to group similar organizations at a high level and further define them into specific categories. For example, in admissions, you can group organizations according to their academic quality by setting up a high-level group type of *Academic Quality.* Within that group type, you can further identify each organization in the group by assigning group codes of *Below Average, Average,* and *Highly Competitive.* Some organization group types are predefined when your system is shipped. Review these to be sure they meet your institution's needs; create others if necessary.

You can also set up the types of contact persons typically available to your institution. Contact types help you to identify the role of the contact person at each organization in your database. For example, you might indicate in that the contact for Cottonwood High School is Mr. Raymond Scott, but you probably also want to specify whether he is a teacher, guidance counselor, or the principal.

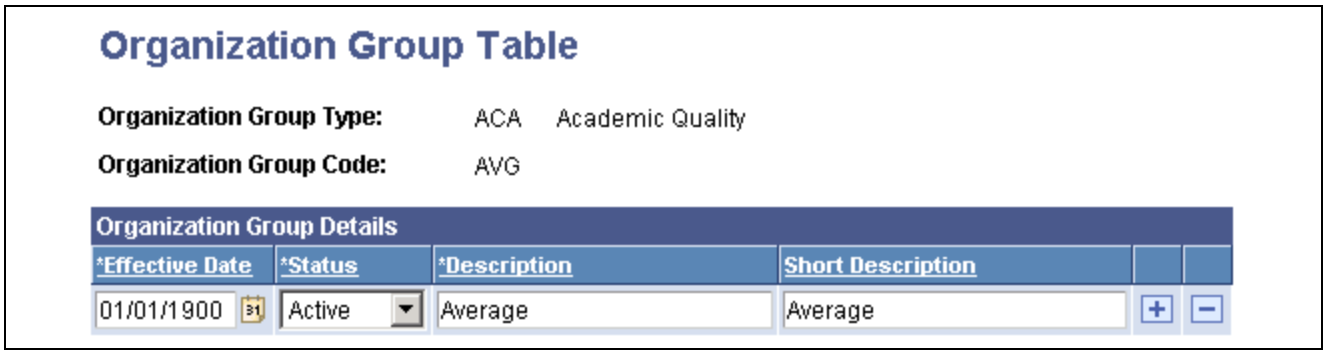
Although these examples relate to schools, group types, group codes, and contact types can help you organize all types of organizations in your system.

Pages Used to Define Groups and Contacts

Page Name	Object Name	Navigation	Usage
Organization Group Table	ORG_GROUP_TABLE	Campus Community, Organization, Define Organization Data, Organization Group Table	Define organization group types and associate them with group codes.
Contact Type Table	ORG_CNTC_TYP_TABLE	• Campus Community, Organization, Define Organization Data, Contact Type Table • Set Up SACR, Product Related, Contributor Relations, Constituent Information, Contact Type Table	Define the type of contacts that your institution might have with the organizations.

Defining Organization Group Types

Access the Organization Group Table page

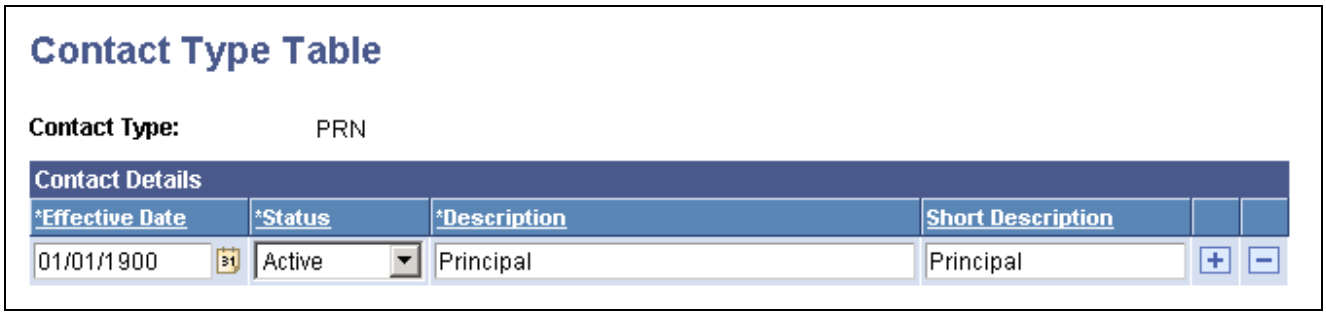


Organization Group Table page

Enter information to define the organization group that you want to create.

Defining Contact Types

Access the Contact Type Table page.



Contact Type Table page

Enter information to define the organization contact type that you want to create.

Creating or Loading External Organization Codes

To create or load external organization codes, use the External Organization Code Type Table component (EXTORGCDTYPE_TABLE).

This section provides an overview of organization codes and discusses how to create or load external codes for organization types.

Understanding External Organization Codes

Load or set up external agency codes to make them available to associate with organizations. For example, if your institution loads Enrollment Planning Service (EPS) market codes, the load process enters each code on the External Organization Code Type table. Those codes are then available for you to assign to organizations on the Organization External Codes page.

See Also

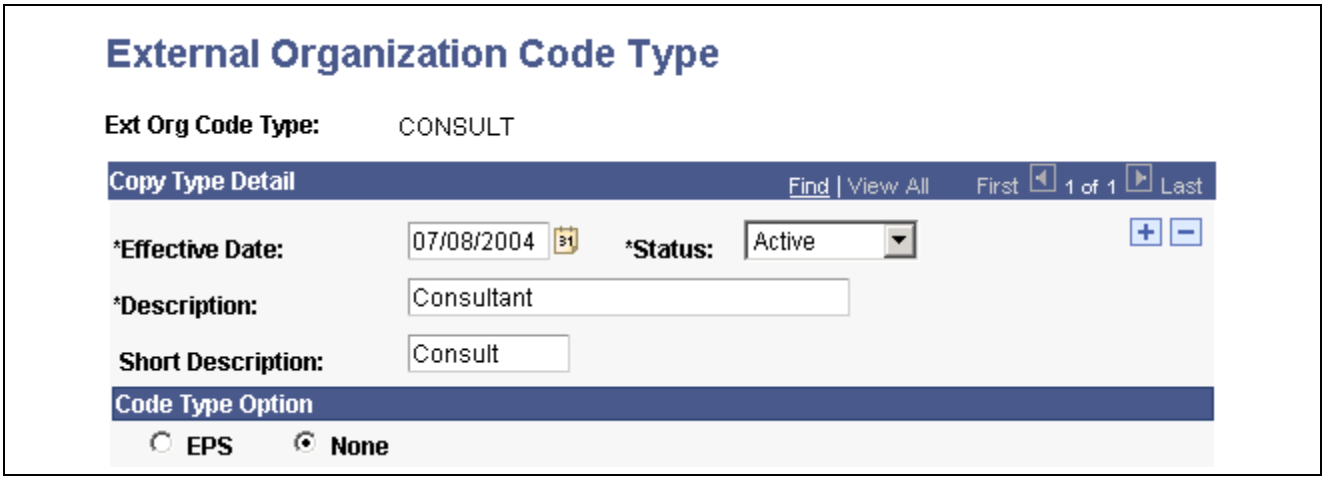
PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, "Loading and Assigning EPS Market Codes"

Page Used to Create External Organization Codes

Page Name	Object Name	Navigation	Usage
External Organization Code	EXTORGCDTYPE_TABLE	Campus Community, Organization, Define Organization Data, Ext Org Code Type Table	Load or define external codes for organization types.

Loading or Defining External Codes for Organization Types

Access the External Organization Code Type page.



External Organization Code Type page

Code Type Option

EPS Select to indicate that this code is an EPS market code.

None Select to indicate that this code is not an EPS market code.

Setting Up External Subject Categories and Term Sessions

To set up external subject categories and term sessions, use the External Subject Table component (EXT_SUBJECT_TBL) and the External Term component (EXTERNAL_TRM_TABLE).

This section provides an overview of external subject categories and term sessions, and discusses how to:

- Define external subject categories.
- Define external term sessions.

Understanding External Subjects, Terms, and Courses

External subjects are general subject areas that you define for the purpose of categorizing external courses.

Set up external subject categories to broadly identify the subjects offered at external institutions. Use those categories to identify which institutions offer courses in those subjects. For example, perhaps one of the entrance requirements at your institution is four years of high school English. Various high schools offer classes titled 17th Century English Literature, Mystery Writers of America, and A Journey through Time with Shakespeare. When these classes appear on a student's transcript they do not readily translate as English courses. If you create a broad external subject of *English,* you can assign these courses to it to help track your institution's English requirements. Use the School Course Classification page to record the specific course offerings for each subject area.

When you track information regarding external institutions for a prospect, applicant, or student, you should know the specific term to which that information is related. For example, when you enter external transcript or external transfer credit information, you should record the term to which the transcript information pertains. Because external institutions use various term structures, possible terms should be available to help identify that particular organization's term structure. Some external terms are redefined translate values. Review these values to verify whether they meet your institution's needs and create others if necessary. You can also set up how you want the system to convert external term sessions to your term structure.

See Also

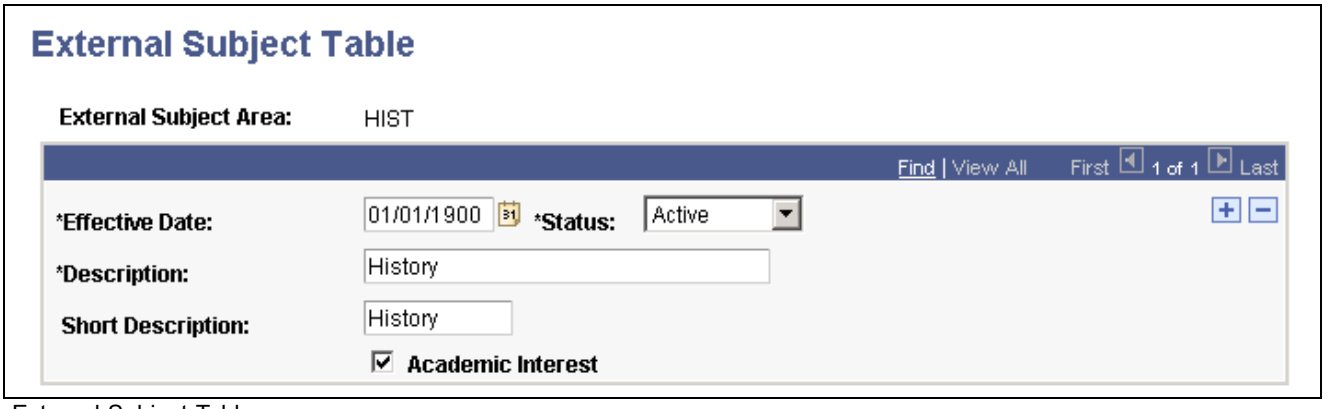
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Processing Transfer Credit"

Pages Used to Set Up External Subject Categories and Term Sessions

Page Name	Object Name	Navigation	Usage
External Subject Table	EXT_SUBJECT_TBL	• Set Up SACR, Common Definitions, External Education, External Subjects • Campus Community, Organization, Define Organization Data, External Subject Table	Define broad categories of the subjects offered at external organizations.
External Term	EXTERNAL_TRM_TABLE	• Set Up SACR, Common Definitions, External Education, External Term • Campus Community, Organization, Define Organization Data, External Term	Define or review possible external terms sessions for external organizations.

Defining External Subject Categories

Access the External Subject Table page.



External Subject Table page

Academic Interest Select this check box to permit this code to be used as both an academic interest code and an external subject code.

Academic interests are external subject areas in which a prospect or applicant has expressed interest that might not be offered by your program. If you want to record those interests for recruiting and analysis purposes, define them here.

When you enter external subjects for a prospect or applicant on the Education page, all codes defined in this table are available.

When you enter academic interests for a prospect or applicant on the Academic Interests page, only the codes that are defined as academic interests on this page are available.

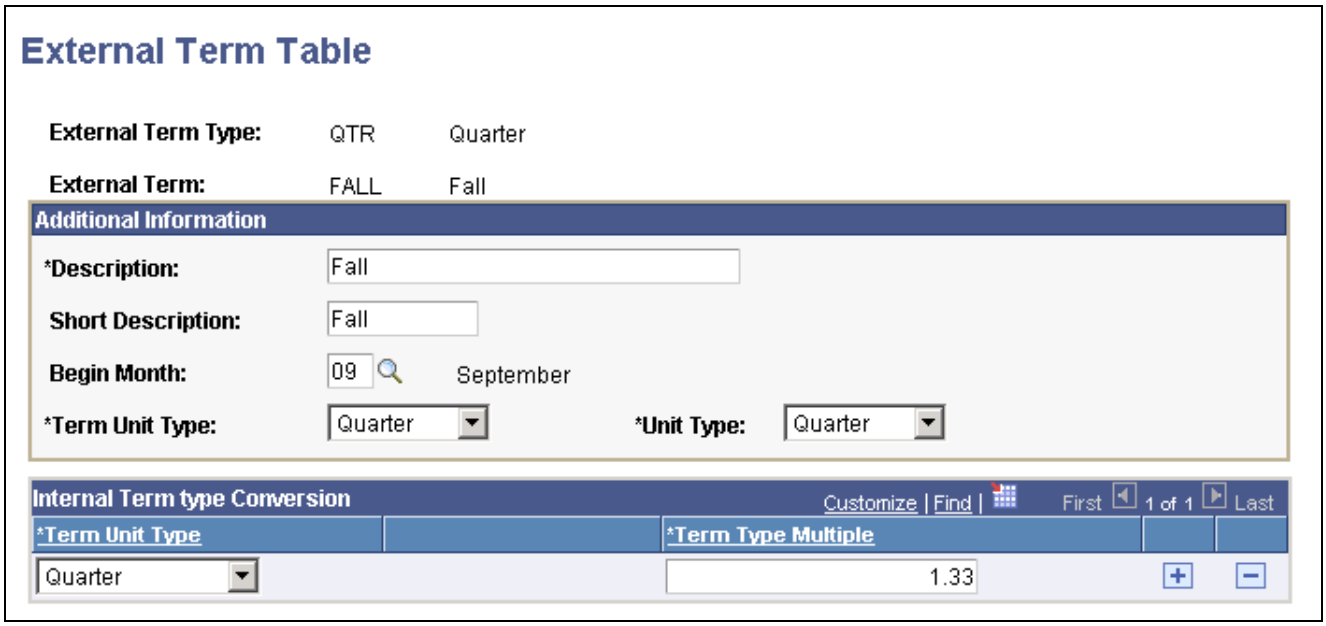
See Also

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, "Tracking Supporting Prospect and Applicant Information"

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, "Tracking External Education Information"

Defining External Term Sessions

Access the External Term Table page.



External Term Table page

Additional Information

Begin Month Enter the month in which the external term begins.

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

Term Unit Type Select the type of internal term unit that most closely correlates to this external term type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type Select the credit or term type that further describes the correlation of this external term to your institution's term unit type.

PeopleSoft Recruiting and Admissions uses this field for information only. For example, they might want to describe the external term as having a Quarter term unit type with a unit type value of *No Credit*.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Internal Term Type Conversion

Term Unit Type Enter the external term unit type that you want the system to convert to an equivalent of the internal term unit

Term Type Multiple Enter the factor by which the system should multiply the external term unit type to convert it to an equivalent of the specified internal term unit type.

For example, the external term unit type of Quarter multiplied by a term type multiple of 1.33 might be the equivalent of your internal Semester term unit type. The system provides this conversion when calculating transfer credit for a manually assigned equivalent course.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Setting Up Unit Conversions

CHAPTER 13

Setting Up Administrative Functions

To set up or review administrative functions and their variable data, use the Administrative Function Table component (ADMIN_FUNCTION_TBL).

This chapter provides an overview of administrative functions and discusses how to:

- Review administrative function codes
- Determine variable data fields

Understanding Administrative Functions

Administrative functions identify the variable data or key fields associated with specific functions in the higher education environment. Throughout your system, when you select a function, the associated fields or data for that function become available. With this feature, PeopleSoft helps you to ensure consistency between all records within a similar functional area across your institution. Administrative functions are also especially useful for extracting relevant data for generating letters and other communications within a specific functional area.

Warning! PeopleSoft delivers predefined administrative functions on the Administrative Functions Table. You should *not* modify the delivered administrative functions. You can add administrative functions; however extensive system configuration is required to do so.

This table lists the administrative functions (and their respective codes) and variable data fields that are delivered in your system.

Code	Administrative Function	Variable Data Fields
ADMA	Admissions Application [Application Level]	• Academic Career • Student Career Number • Application Number
ADMP	Admissions Program [Program Level]	• Academic Career • Student Career Number • Application Number • Application Program Number

Code	Administrative Function	Variable Data Fields
AVAK	Advancement Acknowledgements	• Designation Code • Gift Number • Initiative Code • Recognition Type • Session Number
AVIN	Advancement Initiatives	• Audience Code • Audience Type • Initiative Code
AVMB	Advancement Membership Benefits	• Member Payment Number • Standard Benefit
AVMS	Advancement Membership	• Membership Number • Membership Organization Code
AWRD	Awarding	• Academic Career • Aid Year • Item Type
BDGT	Budget Maintenance	• Academic Career • Aid year • Effective Date (FINA) • Term
EVNT	Event	• Event ID • Meeting Number (optional)
FINA	Financial Aid	Aid Year
GEN	General	None
IHC	International Health Coverage	Coverage Number
ISIR	ISIR Corrections	• Aid Year • Effective Date (FINA) • Effective Sequence (FINA)

Code	Administrative Function	Variable Data Fields
LOAN	Loan	• Aid Year • Loan Type Code • Application Sequence
NLBP	Internships NLD	Internal Contract
NLOW	Educational contracts NLD	Contract Number
PROP	Prospect Program	• Academic Career • Academic Program • Recruiting Center
PROS	Prospect	Academic Career
PSSV	Prospect Self Service	Academic Career
RECR	Recruiters	Academic Career
RSTR	Restricted Aid	• Aid year • Restricted Aid ID
SFAC	Student Financials Account	• Business Unit • Account Number • Account Term
SFBI	Student Financials Billing	• Business Unit • Invoice ID
SFCO	Student Financials Collections	• Business Unit • Collection ID
SFGR	Student Financials Groups	• Business Unit • Group ID
SFIT	Student Financials Item Lines	• Business Unit • Item Number • Line Sequence Number

Code	Administrative Function	Variable Data Fields
SFPA	Student Financials Payments	• Business Unit • Payment ID Number
SFPR	Student Financials Promise	Checklist Date Time
SFRC	Student Financials Receipt	• Business Unit • Cashier's Office • Receipt Number
SFRF	Student Financials Refund	• Business Unit • Refund Number
SFTP	Student Financials Contracts	• Business Unit • Contract Number
SPRG	Student Program	• Academic Career • Career Number
STRM	Student Term	• Academic Career • Academic Term

Reviewing Administrative Functions

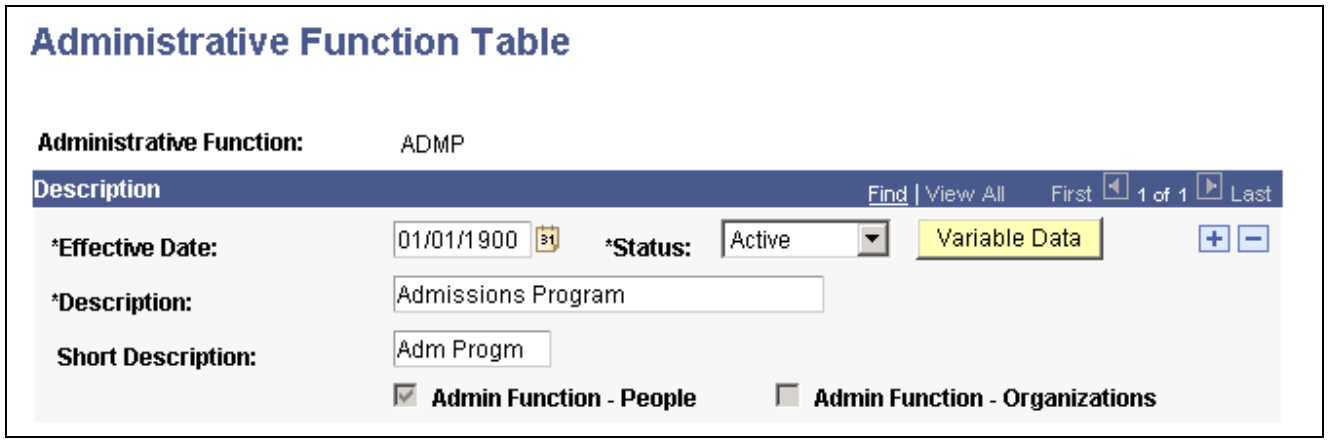
This section discusses how to review administrative function codes.

Page Used to Review Administrative Functions

Page Name	Object Name	Navigation	Usage
Administrative Function Table	ADM_FUNCTION_TABLE	Set UP SACR, Common Definitions, Administrative Function Table	Review administrative functions.

Reviewing Administrative Function Codes

Access the Administrative Function Table page.



Administrative Function Table page

Variable Data Click this button to access the Administrative Function Field Usage page, on which you can view a list of all the variable data fields associated with this function.

Admin Function - People or **Admin Function - Organizations** The system selects these check boxes to indicate whether the function relates to individuals or to organizations in your database.

Determining Variable Data Fields

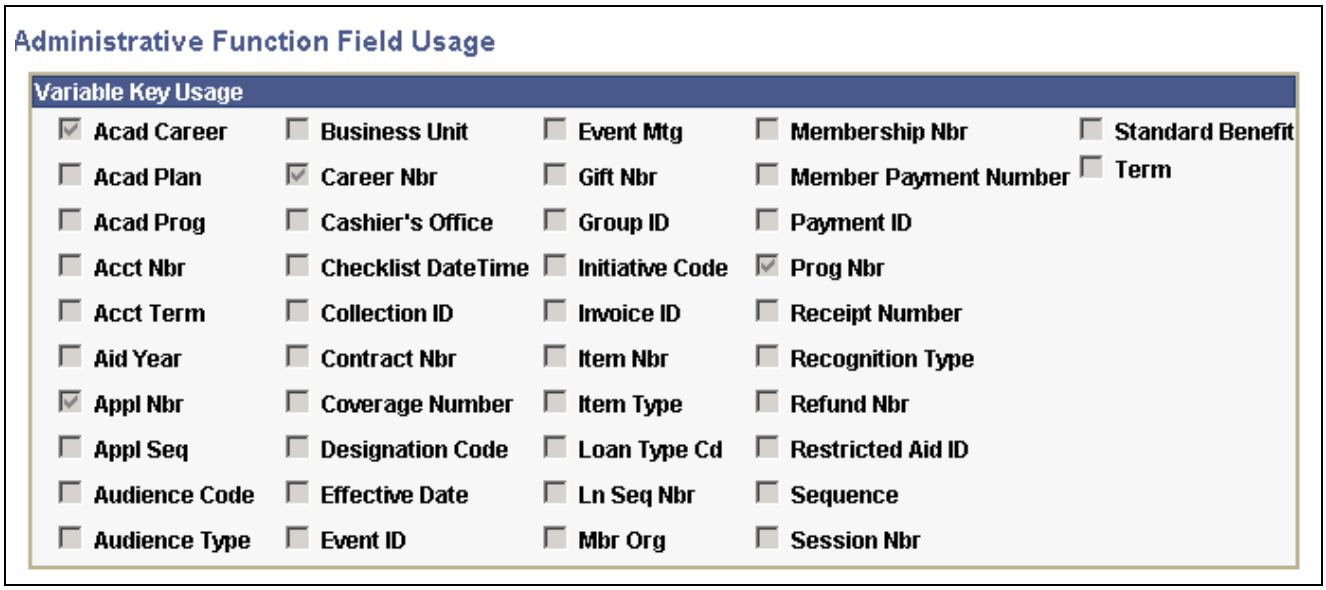
This section discusses how to determine the data fields associated with a function.

Page Used to Determine Variable Data Fields

Page Name	Object Name	Navigation	Usage
Administrative Function Field Usage	ADM_FUNCTION_SP	Click the Variable Data button on the Administrative Functions Table page.	View fields associated with an administrative function.

Viewing Variable Data Fields Associated with a Function

Access the Administrative Function Field Usage page.



Administrative Function Field Usage page

A selected check box indicates that the item is variable data for that administrative function. Administrative functions are shipped with their variable data preassigned. Any modification to these selections could require substantial programming effort.

CHAPTER 14

Setting Up Communications

To set up communications, use the following components: Standard Letter Table (SA_STNDR_LTR_TABLE), Communication Context Table (COMM_CTXT_TBL), Communication Category Table (COMM_CATG_TBL), Communication 3C Groups (COMM_GRP_3C_TBL), and Communication Speed Key Table (COMM_SPEED_KY_INST).

Use the Communication Contexts (SCC_COMM_CTXT_TBL) and Communication Categories (SCC_COMM_CATG_TBL) component interfaces to load the data into the tables for these components.

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

- Define standard letter codes.
- Define communication contexts.
- Define communication categories.
- Set up communication 3C groups.
- Create communication speed keys.
- View communications reports.

See Also

Chapter 31, "Managing Communications," Understanding Letter Generation, page 437

Prerequisites

Before designing your communication structure, do the following to analyze your functional areas and institutional needs for tracking and scheduling communications:

- Understand the use of administrative functions and 3C groups and make sure they are set up properly.
- Identify all incoming, outgoing, and in-person contacts to track.
- Identify the various types of contact (for example, phone, letter, email, and fax) that your institution wants to track.

See Also

Chapter 29, "Understanding the 3Cs—Communications, Checklists, and Comments," page 407

Chapter 13, "Setting Up Administrative Functions," page 123

Chapter 31, "Managing Communications," page 433

Understanding Communications Setup

You must design your communications structure before you can assign communications to individuals, organizations, or groups of individuals.

PeopleSoft delivers sample letter templates in Microsoft Word. If your institution uses Microsoft Word, you can use the sample Word templates as they are, modify them, or create your own. Review the sample templates to determine if they serve your institution's needs or if you must create additional templates. You must then define letter codes for each template that you plan to use.

You can set up standard letter codes to link extracted letter data to your text editor or letter templates for the purpose of generating letters. You can also use the codes to group letters to send together as enclosures.

Communication contexts are broad groupings that indicate the type of communication and how it was sent or received. You can specify more than one method of communication for each context. For example, if students can contact your institution by letter, email, or phone to confirm admission acceptance, you might create an Admissions Acceptance communication context that includes all three methods. You must create communication contexts and then group them into communication categories to set up communication management.

A communication category is a broad grouping of communication contexts that generally indicates why a communication was sent or received. For example, you might create a communication category, called Admissions, that includes the following communication contexts: application received, admission acceptance, admission decline, admission deferral, frosh admit, frosh deny, and so on, or you might decide to create much more detailed communication categories such as Frosh Recruit, Frosh Admission, Graduate Recruit, and Graduate Admission.

You can create communications 3C groups and use them to grant groups of users inquiry or update security access to categories of communications in your database.

Comm Keys (communication speed keys) enable you to create a shorthand method of specifying common communication data. With the five controls in place—standard letter codes, communication methods, communication directions, communication contexts, and communication categories—you can set up Comm Keys to combine these controls with a number of defaults into one shortcut page control.

Note. Comm Keys are required if you are going to use the 3C engine or mass change function to assign communications to individuals or organizations.

See Also

Chapter 31, "Managing Communications," Understanding Letter Generation, page 437

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

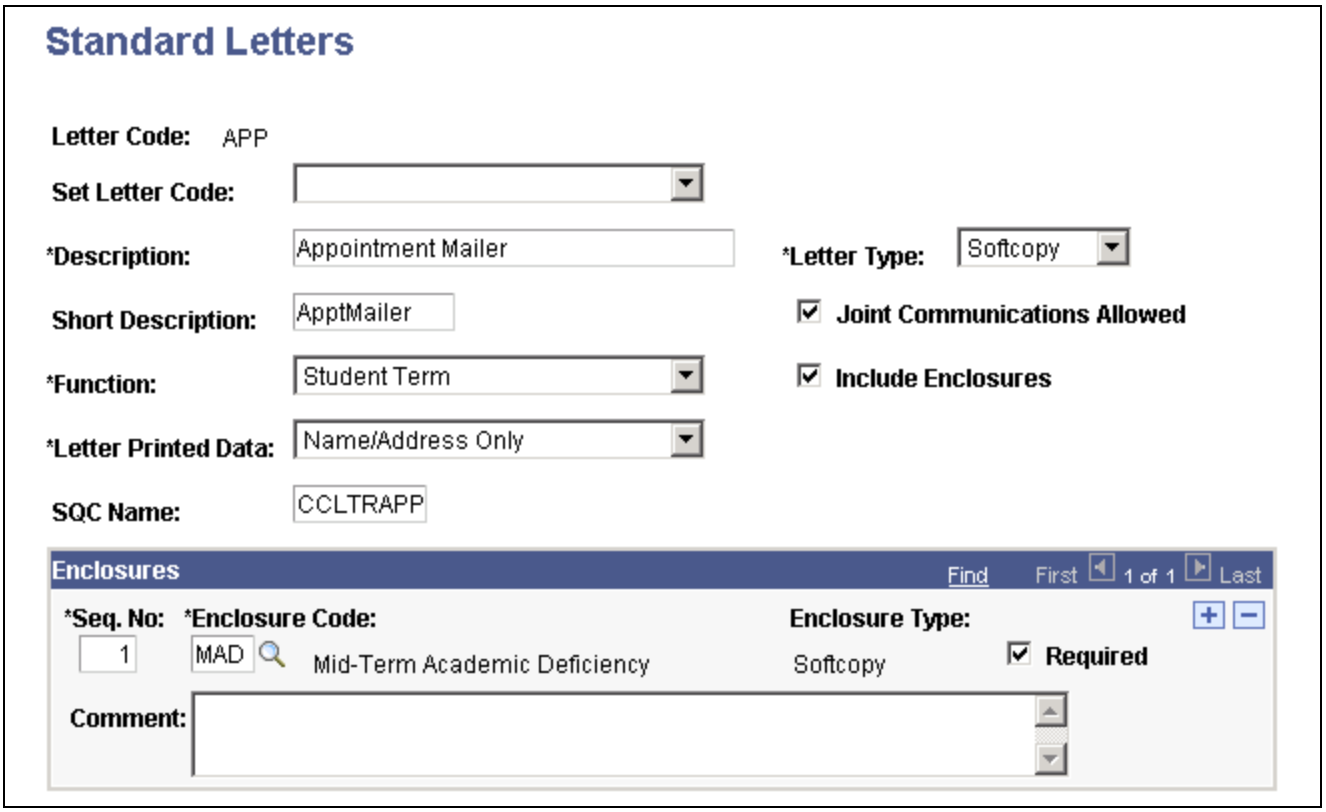
Pages Used to Set Up Communications

Page Name	Object Name	Navigation	Usage
Standard Letters	SCC_STN_LTR_TBL	• Set Up SACR, Common Definitions, Communications, Standard Letter Table CS • Campus Community, Communications, Set up Communications, Standard Letter Table CS • Contributor Relations, Communications, Set Up Communications, Standard Letter Table	Review or define the types of letters that your institution wants to generate, assigning a letter code and administrative function to each. You can also group letters here to create enclosures.
Communication Context	COMM_CTXT_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Context Table • Contributor Relations, Communications, Set Up Communications, Communication Context Table • Campus Community, Communications, Set up Communications, Communication Context Table	Create and define communication contexts.
Communication Categories	COMM_CATG_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Category Table • Contributor Relations, Communications, Set Up Communications, Communication Category Table • Campus Community, Communications, Set up Communications, Communication Category Table	Define categories of communication contexts to indicate why a communication was sent or received.
3C Update/Inquiry Group Table	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of users who have similar needs and interests.

Page Name	Object Name	Navigation	Usage
Communication 3C Groups	COMM_GRP_3C_TABLE	• Set Up SACR, Common Definitions, Communications, Communication 3C Groups • Contributor Relations, Communications, Set Up Communications, Communication 3C Groups • Campus Community, Communications, Set up Communications, Communication 3C Groups	Associate one or more 3C update/inquiry groups with a communication category.
Communication Speed Keys	COMM_SPDKEY_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Speed Key Table • Contributor Relations, Communications, Set Up Communications, Communication Comm Key Table • Campus Community, Communications, Set up Communications, Communication Speed Key Table	Create Comm Keys for specifying common communication data.

Defining Standard Letter Codes

Access the Standard Letters page.



Standard Letters page

Note. Standard letter codes are not shared between Campus Solutions and HRMS. Standard letter codes for Campus Solutions are stored in the SCC_STN_LTR_TBL. Standard letter codes for HRMS are stored in the STANDARD_LTR_TBL. Be sure to read the specific product documentation before modifying a letter code delivered within that product.

Within Campus Solutions, you must be familiar with the scope of the PeopleSoft Enterprise Financial Aid *FAN* code or template before modifying it.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Generating Form Letters" and *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*, "Awarding and Packaging Students," Creating the FAN Extract File and Producing the FAN Letter.

Set Letter Code

Select the category (such as Admit Letters, Inquiry Response Letters, Recruitment Letters, and so on) that best describes the group of letters that includes this letter code. This field is optional and for information only.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Function

Select the function, from the Administrative Function Table page, that identifies the variable data to extract for communications associated with this letter code.

For example, if you are sending a letter to a freshman applicant under the function of *Student Term,* the variable data of Academic Career and Term are extracted for the communication. The variable data are set up in the Administrative Function Table and cannot be modified.

Letter Printed Data

Select the value to use to control the data shown on the Communication Letter Data page. (When you run the letter generation data extract process, a huge amount of data is extracted. The extracted data that you specify here are listed on the Letter Data page for your view.)

All: All of the communication section headers and their data should be included. If you select this, note that the table will be very large and could take significant time to load.

Name/Address Only: Only the name and address communication section headers and data should be included.

None: None of the communication section headers and data should be included.

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

SQC Name

Enter the name of the unique SQC, if any, required to generate additional variable data for communications associated with this letter code.

The letter generation process uses the unique SQC to extract data into a letter template. You must modify the letter generation SQR to look for any SQCs that you specify here.

Warning! Do *not* modify the CCLTRWOL.SQC. The User Profiles Management process requires this SQC. Any modifications to this could require substantial programming effort. For information about the SQCs that are delivered with your system, see PeopleSoft Customer Connection.

Letter Type

Select the check box for the desired output form for this letter. Values are:

Hardcopy: Does not allow the system to extract data or merge into a softcopy template. Indicates preprinted items, such as brochures or pamphlets.

Softcopy: Allows the system to extract data and merge into a softcopy template, which you can then print.

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

Joint Communications Allowed

Select this check box to permit this letter to be addressed jointly to two people at the same address, provided that they have a relationship, defined in your database, that permits joint communications.

The sample Microsoft Word template CCLTRJNT.doc is delivered with your system for use with joint communications.

See Chapter 31, “Managing Communications,” page 433.

Include Enclosures

Select this check box to indicate that other letters need to be grouped and sent with this letter.

Enclosures

This scroll area is available only when the Include Enclosures check box is selected. You can group a maximum of ten letter codes as enclosures here. Letter codes from which to choose must already exist on the Standard Letters page.

Seq Number(sequence number)
Displays the number of this enclosure in the list of enclosures for this letter. The system automatically enters the next sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures.

When you run the letter generation data extract process, the process lists, in the order identified here, up to ten enclosures on the main letter in the order identified here.

Enclosure Code
Enter the code for the letter to include as an enclosure.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code prompt list displays the letter codes that exist and that are associated with the function ADMA on the Standard Letters page.

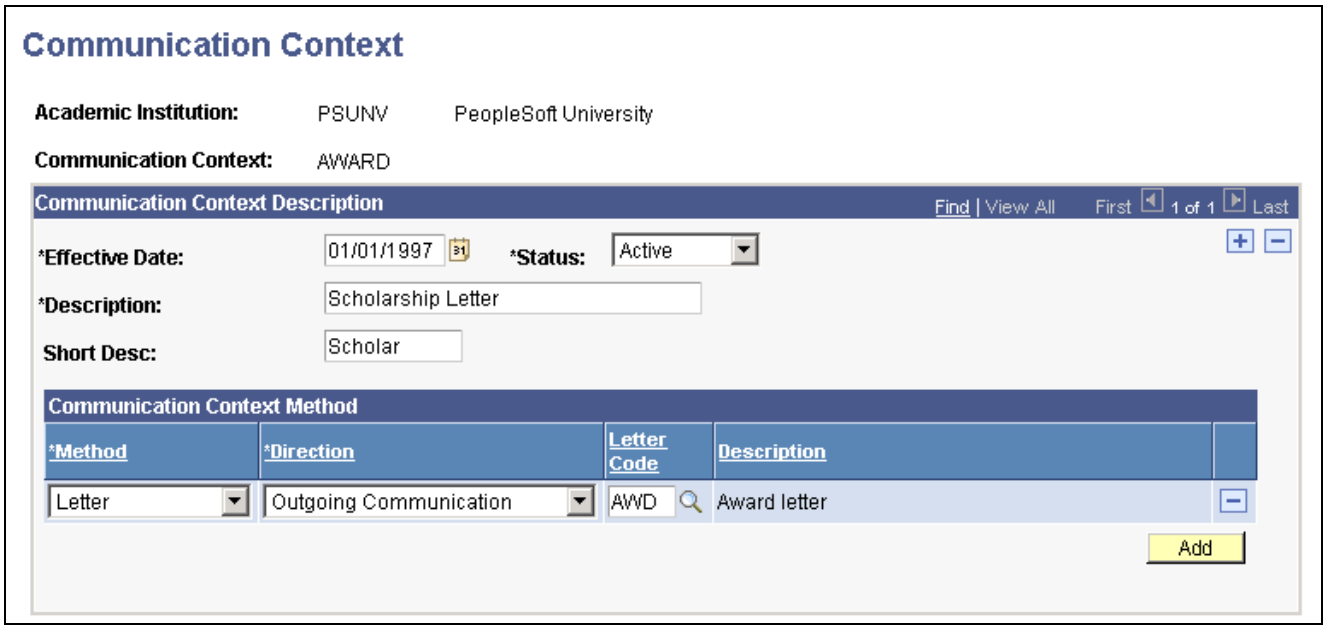
Enclosure Type
The system displays the type of output associated with the selected enclosure letter code, either *Softcopy* or *Hardcopy.*

Required
Select this check box to indicate that the specific enclosure must accompany the main letter at all times. Administrative users can remove optional enclosures when they assign the communication to an individual on the Communication Management 1 page.

Comment
Enter comments to further identify or describe this enclosure. Enclosure comments are for information purposes only. They will not be printed in the communication.

Defining Communication Contexts

Access the Communication Context page.



Communication Context page

Communication Context Method

Method Select the form of this communication (for example, letter, email or, phone call).

A communication context can have multiple methods. For example, for the context of Award, you might send a letter and also make a phone call.

Values for this field are delivered with your system as translate values. The *Letter* value is required for generating letters; do not modify it. You can, however, modify any of the other method translate values.

Direction Specify the direction of this communication, such as in person, incoming communication, or outgoing communication).

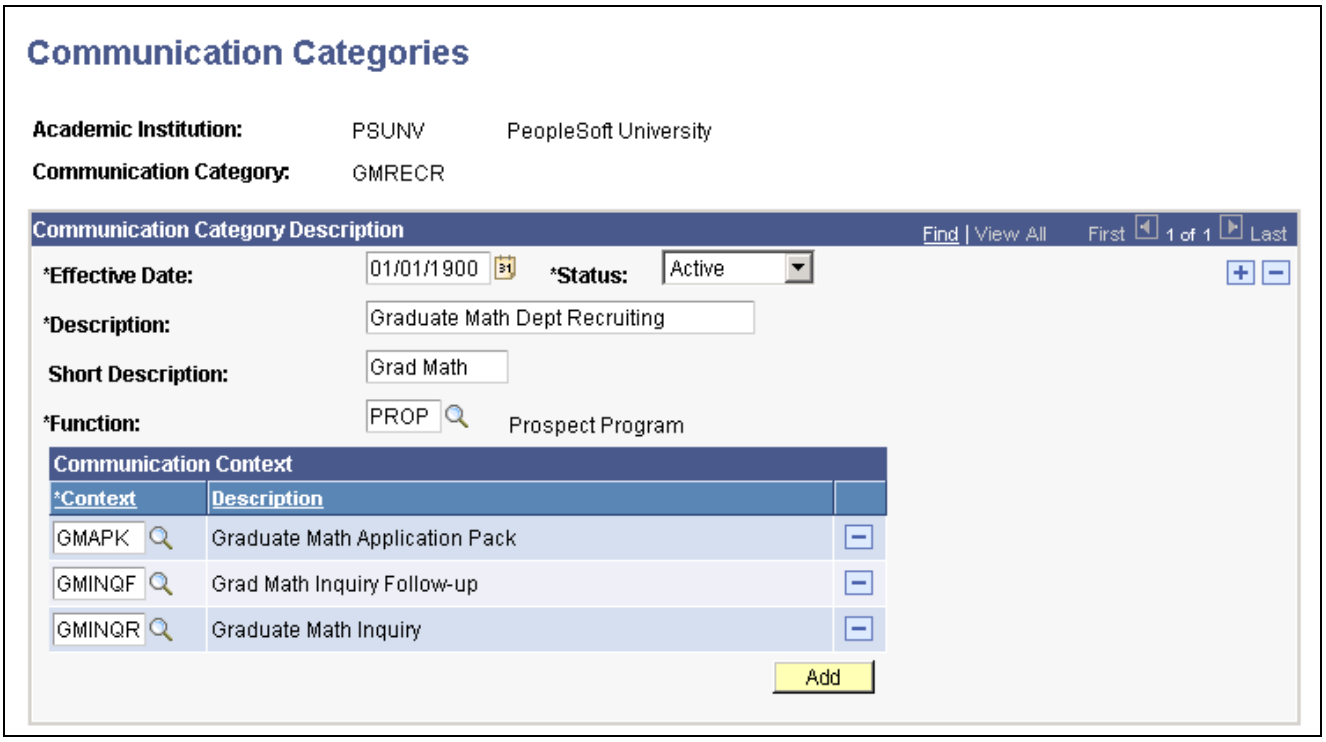
Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication,* you can modify these translate values.

Letter Code Enter the code for this communication. The code specifies the variable data associated with this communication. The Letter Code field is available only when you specify *Outgoing Communication* in the Direction field.

Available letter codes are from the Standard Letters CS page.

Defining Communication Categories

Access the Communication Categories page.



Communication Categories page

Note. Communication categories are assigned to communication 3C groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories. Therefore, make your communication categories specific so that you have more flexibility to determine which users have access to which communications.

Communication Category Description

Function Enter the functional area to include in this category. The function determines the variable data that will be associated with communications in this category.

Available function codes are from the Administrative Functions page.

Communication Context

Context Enter each context to include in this category.

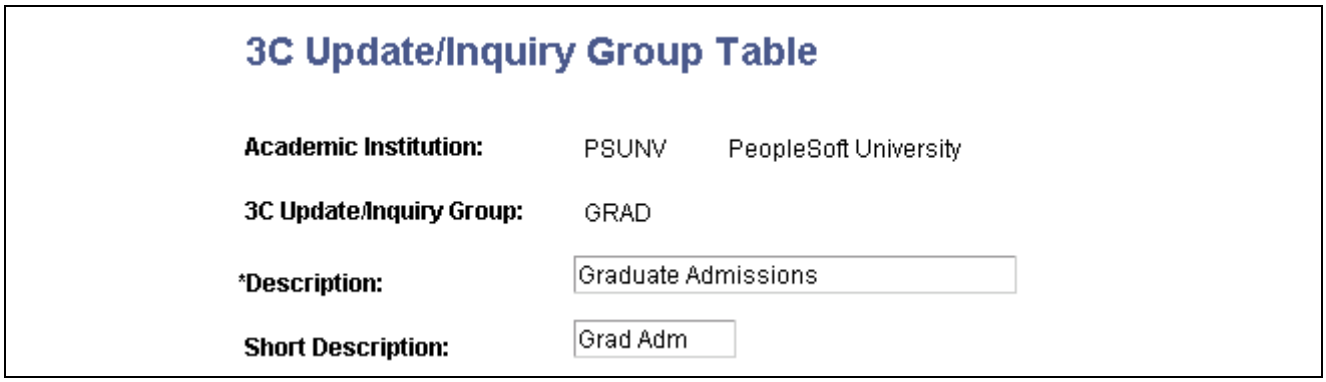
Available context codes are from the Communication Contexts page.

Description The system displays the long description from the Communication Contexts page of the context that you select.

Warning! All contexts from the Communication Context page are available, regardless of whether they include a letter code associated with the same function as the communication category. For example, if you select a context that has a letter code associated with the ADMA function and a category associated with the PROP function, the letter code will not be available as a valid choice when you assign the communication on the Communication Management page.

Defining 3C Update/Inquiry Groups

Access the 3C Update/Inquiry Groups page.



3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a communication category to create a Communication 3C Group.

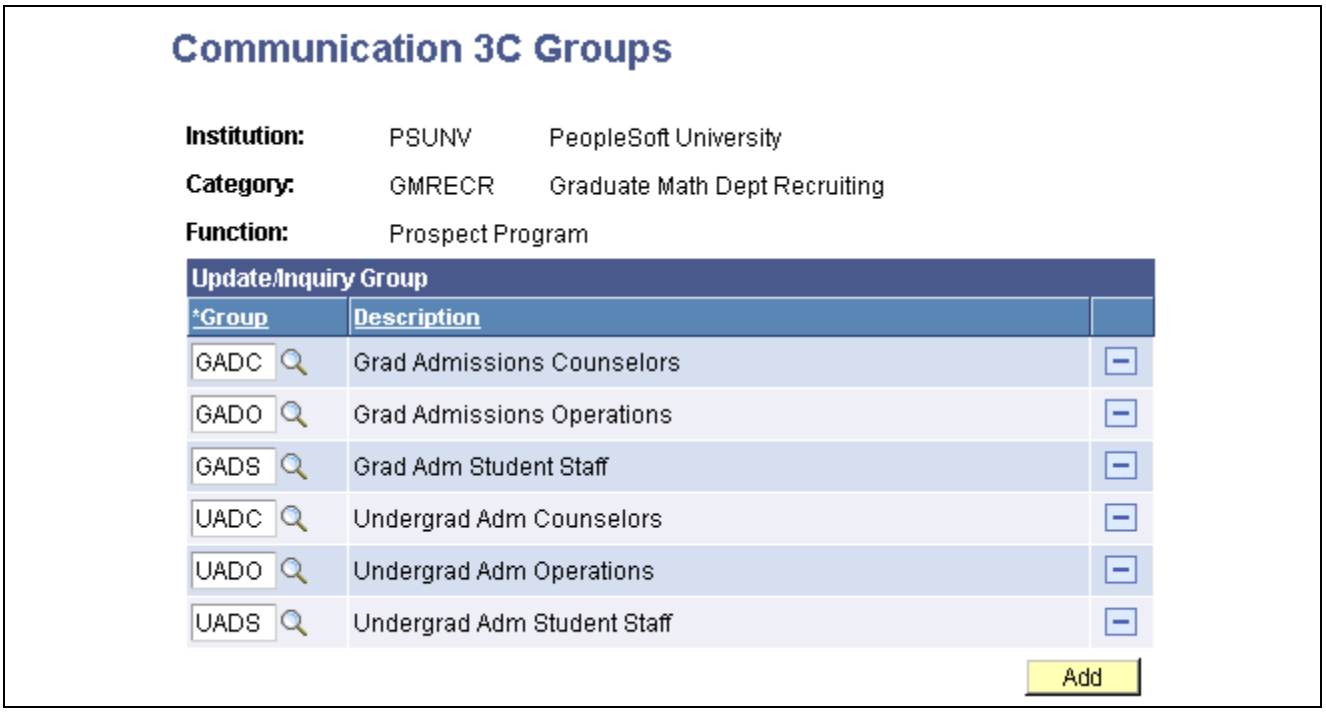
Security Administrators give users security access based on 3C update/inquiry groups.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

Defining Communication 3C Groups

Access the Communication 3C Groups page.



Communication 3C Groups page

Update/Inquiry Group

Group Enter each group that should have access to this communication category.

Available group codes are from the 3C Groups page.

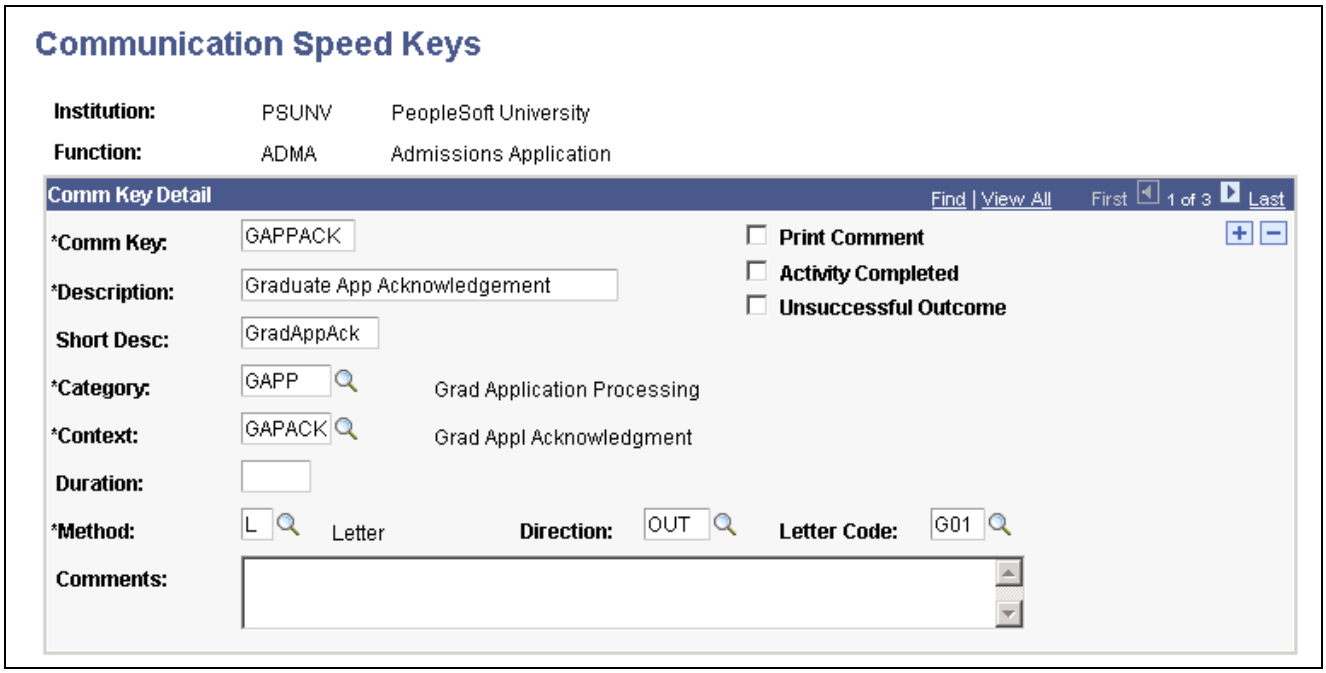
Description The system displays the long description from the 3C Groups page, of the group that you select.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Selecting the Type of 3C Group Access

Defining Communication Speed Keys

Access the Communication Speed Keys page.



Communication Speed Keys page

Comm Key (communication key) Enter the name of the communication speed key to represent this set of communication elements.

Category Enter the communication category to associate with this communication speed key.

Context Enter the communication context to associate with this communication speed key.

Duration Enter the average duration, expressed in minutes, for the type of communication that you are associating with this communication speed key. (Optional)

Duration is usually used to specify the length of time for in-person communications (for example, the duration of a phone call).

Method Specify the typical method of the communication that you are associating with this communication speed key. The *Letter* method is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Letter,* you can modify these translate values.

Direction Specify the direction of the communication you are associating with this communication speed key. The *Outgoing Communication* direction is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication,* you can modify these translate values.

Letter Code Enter the code, from the Standard Letters CS page, for the communication that you are associating with this communication speed key.

Comments	Enter comments to further describe or identify the communication to associate with this communication speed key.
Print Comment	Select this check box to include or print the comments on the Comments pages in the communication associated this communication speed key.
Activity Completed	Select this check box to make the status of *Complete*available with this communication speed key. This option is useful when data for a communication is typically entered after the activity is completed. For example, if the communication is an incoming phone call or an incoming letter, when you report it in the system, the communication is already complete.
Unsuccessful Outcome	Select this check box to make the status of *Unsuccessful*available with this communication speed key. For example, if you were to hold a telephone fund-raising event, you might want to record each call to track your success rate. You could create two communication speed keys—one for successful phone calls, and one for unsuccessful phone calls.

Note. Before users can use the communication speed keys defined here, the communication speed key codes must be assigned in the users' defaults.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Setting Defaults for Communication Keys

CHAPTER 15

Setting Up Comments

This chapter provides an overview of comment setup, lists prerequisites and common elements, and discusses how to:

- Set up comment categories.
- Define 3C update/inquiry groups.
- Create 3C comment groups.
- Set up comment 3C group security.

Understanding Comment Setup

To attach comments to records, you must first create comment categories and associate them with 3C groups to define who, at your institution, has the security access to write, review, or change comments.

You can assign comments to individuals and organizations manually, or you can use the 3C engine to automatically assign comments to individuals or organizations based on rules and conditions that you define.

See Chapter 30, "Using the 3C Engine," Defining 3C Engine Triggers, page 415.

Prerequisites

Before defining comment categories and associating them with 3C groups, you must understand and set up administrative codes, 3C group security, and assign individuals to specific 3C groups.

See Also

Chapter 13, "Setting Up Administrative Functions," page 123

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

Chapter 30, "Using the 3C Engine," page 409

Common Elements Used in This Chapter

Administrative Function The code for the administrative area with which the comment category is associated.

3C Group The comment group to which a user has security access.

Setting Up Comment Categories

To set up comment categories, use the Comment Category Table component (CMNT_CATG_TBL).

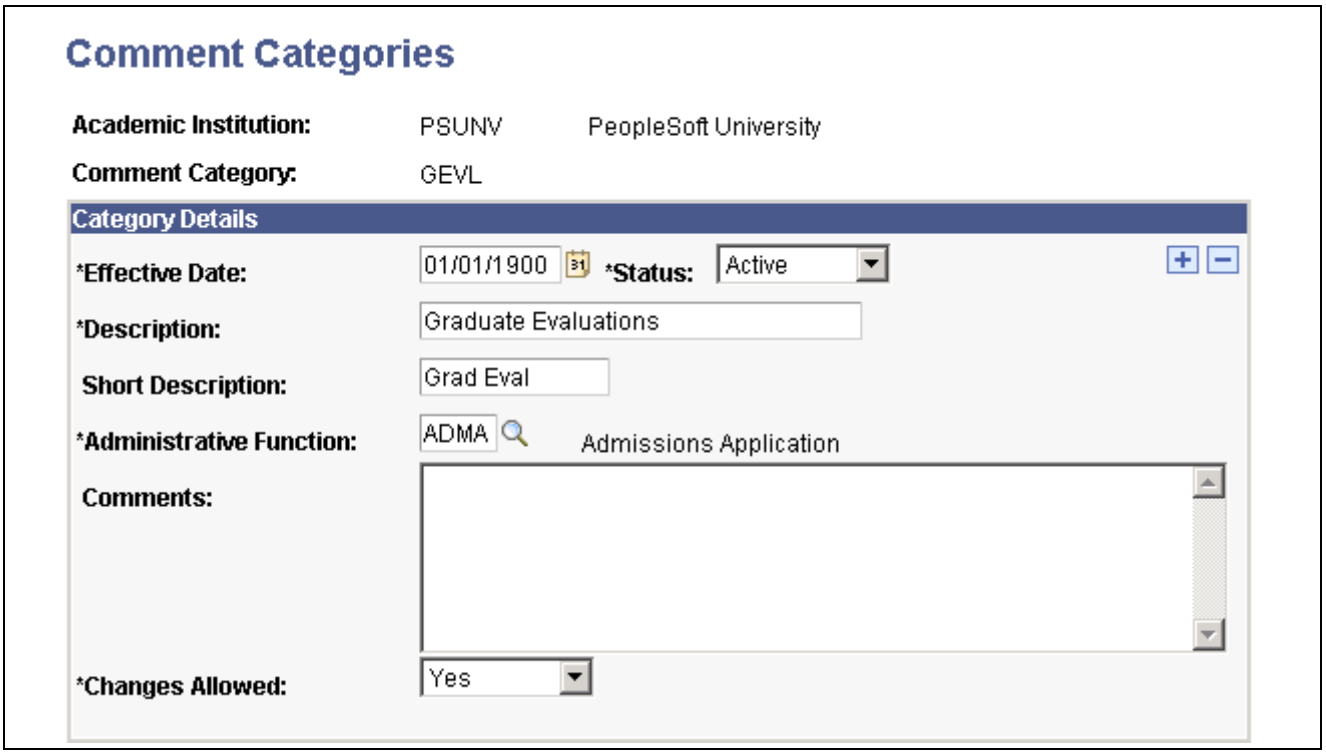
This section discusses how to define comment category codes.

Page Used to Set Up Comments

Page Name	Object Name	Navigation	Usage
Comment Categories	CMNT_CATG_TABLE	• Set Up SACR, Common Definitions, Comments, Comment Category Table • Campus Community, Comment, Set Up Comments, Comment Category Table	Define categories that enable you to group comments for similar purposes.

Defining Comment Category Codes

Access the Comment Categories page.



Comment Categories page

Category Details

Administrative Function Enter the code for the administrative area with which this comment category is associated.

Available function codes are from the Administrative Functions page.

Comments Enter the default comment to use when this comment category is assigned to an individual.

Changes Allowed Indicate whether users should be permitted to change the default comment associated with this comment category. The default value is *Yes.* You can override this value.

Append: Users can add to the default comment, but cannot change or edit it.

No: Users cannot change, edit, or add to the default comment.

Defining 3C Update/Inquiry Groups

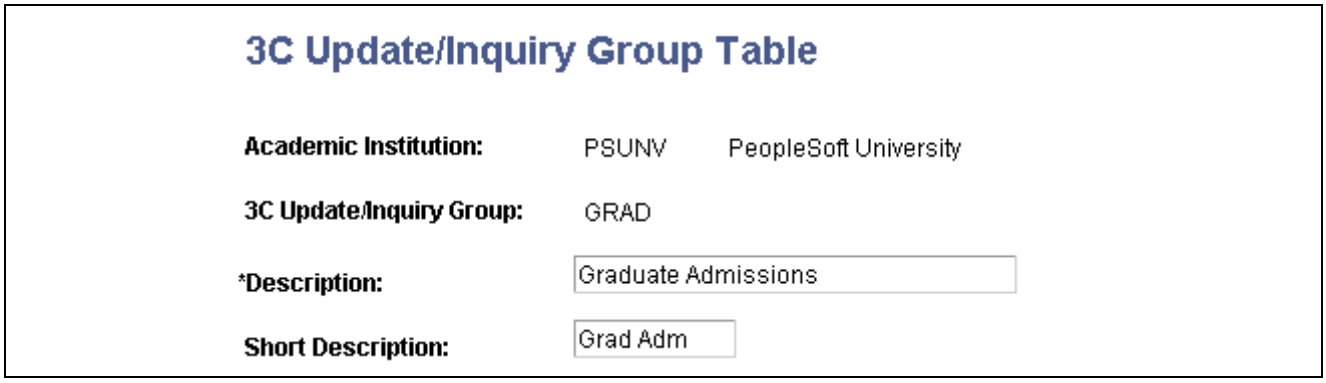
To define 3C Update/Inquiry Groups, use the 3C Update/Inquiry Groups component (GROUP_3C_TBL).

Page Used to Define 3C Update/Inquiry Groups

Page Name	Object Name	Navigation	Usage
3C Update/Inquiry Group	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of IDs who have similar interests and needs.

Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Groups page.



3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a comment category to create a Comment 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

Setting Up Comment 3C Groups

To set up comment 3C groups, use the Comment 3C Groups component (CMNT_GRP_3C_TBL).

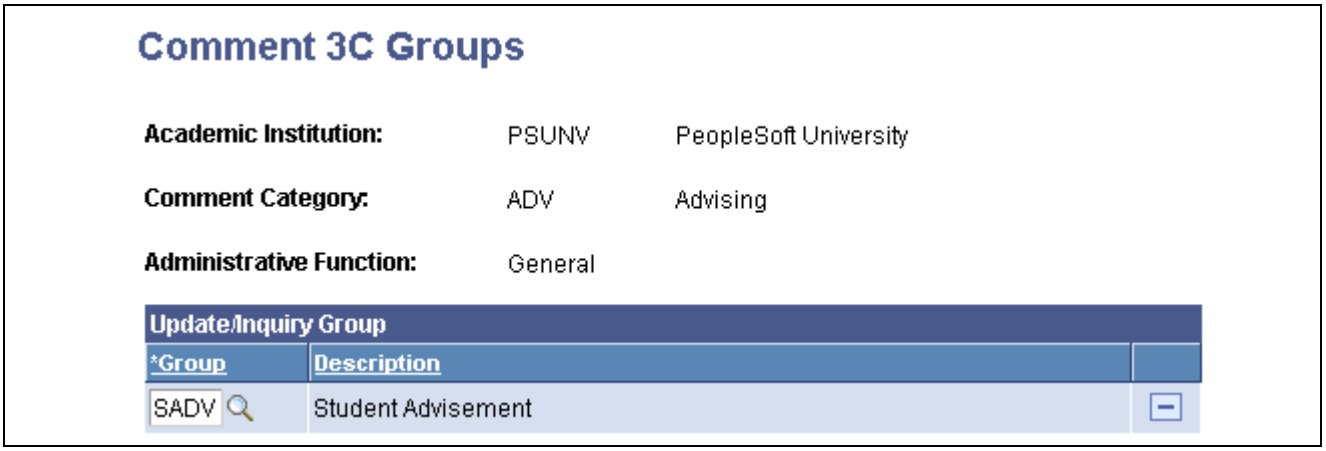
This section discusses how to create a comment 3C group.

Page Used to Set Up Comment 3C Groups

Page Name	Object Name	Navigation	Usage
Comment 3C Groups	CMNT_GRP_3C_TABLE	• Set Up SACR, Common Definitions, Comments, Comment 3C Groups • Campus Community, Comments, Set up Comments, Comment 3C Groups	Associate one or more 3C update/inquiry groups with a comment category.

Creating a Comment 3C Group

Access the Comment 3C Groups page.



Comment 3C Groups page

CHAPTER 16

Setting Up Checklists

This chapter provides and overview of setting up checklists, lists prerequisites, and discusses how to:

- Set up checklist items.
- Associate checklist items with administrative functions.
- Set up checklist tracking groups.
- Set up checklist templates.
- Define 3C update/inquiry groups.
- Set up checklist 3C groups.

See Also

Chapter 29, "Understanding the 3Cs—Communications, Checklists, and Comments," page 407

Chapter 30, "Using the 3C Engine," page 409

Chapter 33, "Managing Checklists," page 477

Understanding Checklist Setup

To create checklists, you must set up checklist items. You can assign a responsible person, a status, and a due date to each checklist item. You can then relate multiple checklist items to a specific checklist and assign a due date for the overall checklist. You can also associate checklist items with an administrative function and use that function to enter some or all of the items as a subset of items on a larger, more comprehensive checklist with its own overall due date. In addition, you can combine several checklists into one monitoring unit called a tracking group.

You can make the checklist items as general or as specific as you want. For example, checklist items might include an admission application that a student needs to submit, a letter that a member of your staff needs to write, or a phone call that a staff member needs to make.

You can associate a checklist item with multiple administrative functions. However, when you use an administrative function to create a checklist, you can enter only the checklist items associated with that administrative function.

You can combine several checklists within the same administrative function into one unit for fast, organized monitoring. For example, if you were to create a checklist of items typically required for an admissions application, you might begin by creating a checklist item for receiving the individual's ACT or SAT 1 test scores. You might also set checklist item codes for the application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To set up the checklist item code for receiving ACT or SAT 1 test scores:

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Item Table.
2. Enter a checklist item code, such as *ACTSAT*.
3. Enter a description to identify the checklist item.

   In this case, you might enter *ACT or SAT 1 Test Scores*.
4. Enter a short description.

   If you do not enter a short description, the system enters one based on the description.
5. Enter a long description to provide more information about the checklist item or to enter a comment.

   If you use this checklist item as part of generating a letter, the data in the long description is included in the letter generation output data. You can specify whether to print it in the letter.

   See Chapter 31, "Managing Communications," page 433.

After you create the checklist item code for the offer letter, you can continue creating checklist item codes for each item that you want on your checklist. When you are finished setting up checklist items, you can set up checklist function items.

You can associate a set of checklist items with a particular administrative function. You can then use that administrative function to indicate a subset of checklist items that you want to include in a larger checklist.

For example, you could associate a set of checklist items with the function of Admissions Application. These checklist items might include the ACT or SAT 1 test scores, application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To associate the ACT or SAT 1 test scores checklist item with the administrative function of Admissions Application:

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Function Item Table.
2. Enter the administrative function, such as *ADMA*.
3. Enter the item code of the first checklist item that you want to associate with this function, in this case, ACT/SAT.

   Continue to associate relevant checklist items with this function. You can associate many checklist items with a function. You can also choose other functions, and associate checklist items with each of them.

After all checklist items are associated with an administrative function, you must group the checklist items into checklists, which you can then assign to individuals or organizations. When you assign a checklist code to an individual or organization, the system assigns each of the checklists items in that code to that individual or organization.

In our example, you want to create a checklist code of UGALL for all undergraduate requirements, and include the checklist items ACT and SAT 1.

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Table.
2. Enter the checklist code that you want to create and the function from which you want to select checklist items.

   For this example, the checklist code is *UGALL* and the function is *ADMA*.
3. Define what type of checklist this will be, such as Requirement List.

Additionally you can set up tracking groups. A tracking group provides a logical connection between the checklists that are associated with an individual. For example, you may have several checklists for the same student in the undergraduate applications function, but only some of those checklists are related to the student's loan requirements. You might want to monitor the status of the student's loan documents to determine when the loan document requirements are complete. When you create the checklist and assign a checklist code, you could also assign the checklist to a loan documents tracking group.

Users can access checklists only in the checklist categories to which you grant them 3C group security access.

Prerequisites

Before defining checklist items and associating them with functions, become familiar with administrative functions. Before using communication speed keys to create a checklist template, set up communication speed keys in your system.

See Also

Chapter 13, "Setting Up Administrative Functions," page 123

Chapter 14, "Setting Up Communications," Defining Communication Speed Keys, page 139

Setting Up Checklist Items

To set up checklist items, use the Checklist Item Table component (CS_CHK_ITEM_TBL).

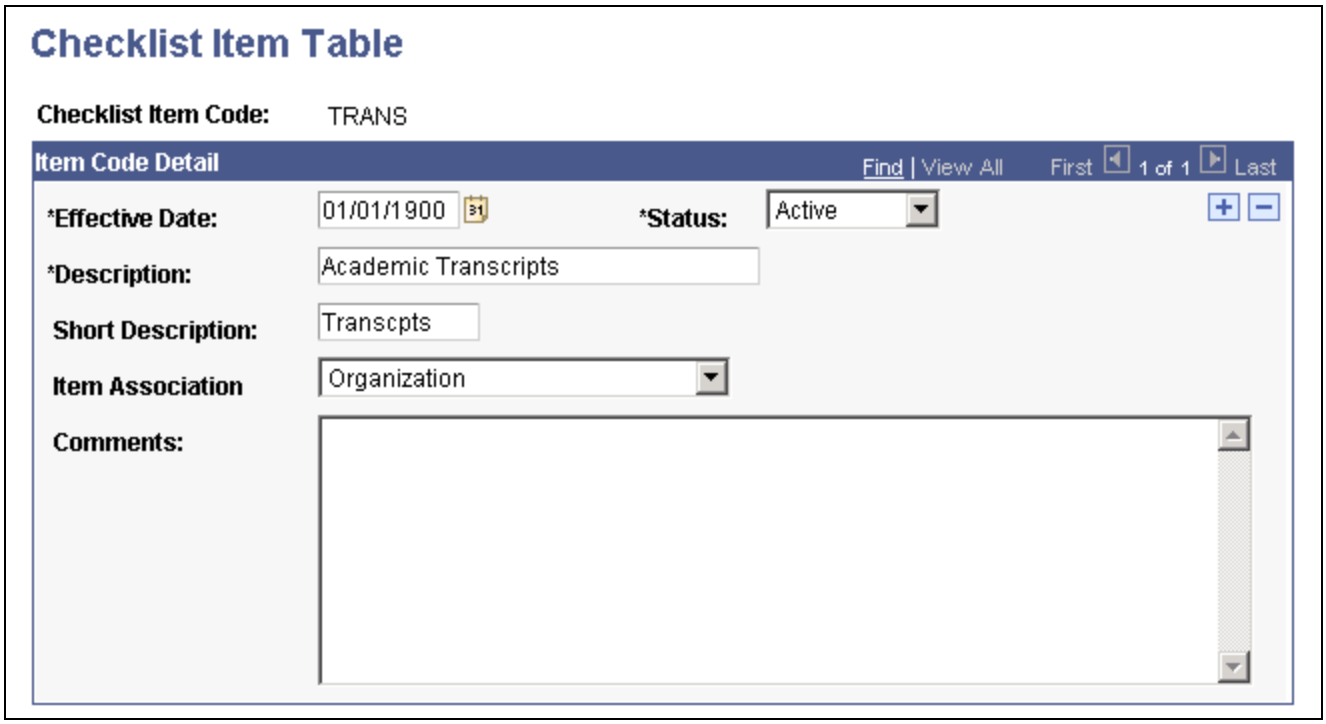
This section discusses how to define checklist items.

Page Used to Set Up Checklist Items

Page Name	Object Name	Navigation	Usage
Checklist Item Table	SCC_CHECKLST_ITEM	• Set Up SACR, Common Definitions, Checklists, Checklist Item Table • Campus Community, Checklists, Set up Checklists, Checklist Item Table	Define items to make available for checklists.

Defining Checklist Items

Access the Checklist Item Table page.



Checklist Item Table page

Item Association

If the item is associated with a particular person or organization in any way, you can select either *Name* or *Organization* to indicate that.

The item association that you select here is used on checklist management pages when you assign checklists to IDs. Although you assign the checklist to the ID, you might want to know that an item must come from, or is in some other way associated with, another individual or organization. For example, you might assign a checklist item called *Transcript* to an individual, and that item might be created with an item association of *Organization.* On the checklist management page where you assign the checklist to the ID, you can identify the organization (for example, *PeopleSoft University)*from which that transcript is needed for the applicant to be admitted. This is especially helpful if you need to receive multiple transcripts for an applicant.

The Item Update - Automated process, which links checklist items with transcripts with general materials, such as recommendation letters, and with tests scores in PeopleSoft Enterprise Recruiting and Admissions, also uses this.

Values for this field are delivered with your system as translate values. You should not modify these translate values.

Associating Checklist Items with Administrative Functions

To associate checklist items with administrative functions, use the Checklist Function Item Table component (CHK_FUNCTION_TABLE).

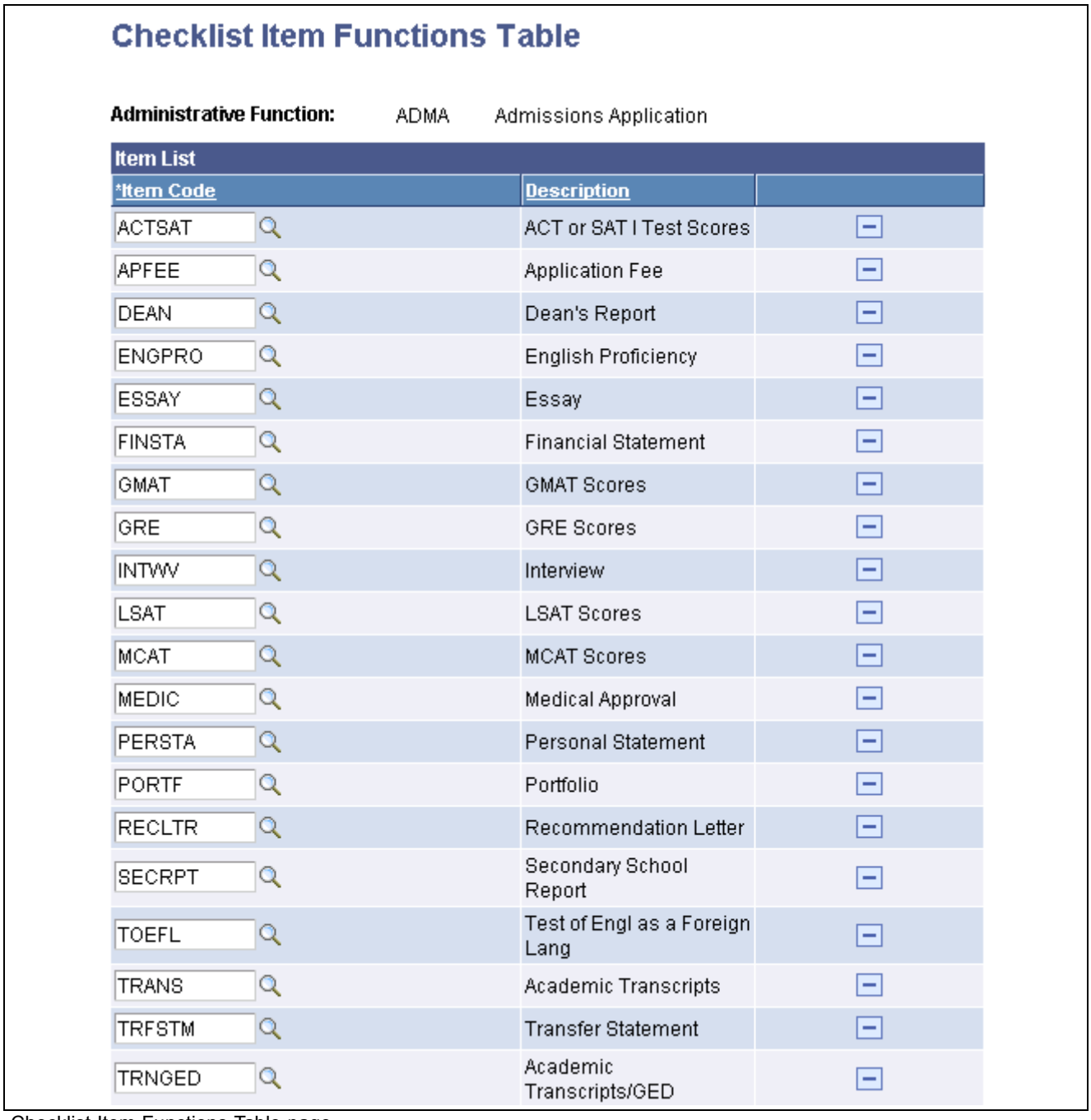
This section discusses how to associate items with a function.

Page Used to Associate Checklist Items with Administrative Functions

Page Name	Object Name	Navigation	Usage
Checklist Item Functions Table	CHK_FUNCTION_TABLE	• Set Up SACR, Common Definitions, Checklists, Checklist Function Item Table • Campus Community, Checklists, Set up Checklists, Checklist Function Item Table	Associate checklist items with an administrative function.

Associating Items with a Function

Access the Checklist Item Functions Table page.



Checklist Item Functions Table

Administrative Function: ADMA Admissions Application

Item List

*Item Code	Description
ACTSAT	ACT or SAT I Test Scores
APFEE	Application Fee
DEAN	Dean's Report
ENGPRO	English Proficiency
ESSAY	Essay
FINSTA	Financial Statement
GMAT	GMAT Scores
GRE	GRE Scores
INTWV	Interview
LSAT	LSAT Scores
MCAT	MCAT Scores
MEDIC	Medical Approval
PERSTA	Personal Statement
PORTF	Portfolio
RECLTR	Recommendation Letter
SECRPT	Secondary School Report
TOEFL	Test of Engl as a Foreign Lang
TRANS	Academic Transcripts
TRFSTM	Transfer Statement
TRNGED	Academic Transcripts/GED

Checklist Item Functions Table page

Item Code Enter the code for the checklist item associated with this administrative function.

Available item codes are from the Checklist Items page.

Setting Up Tracking Groups

To set up tracking groups, use the Tracking Group Table component (TRACK_GRP_TBL).

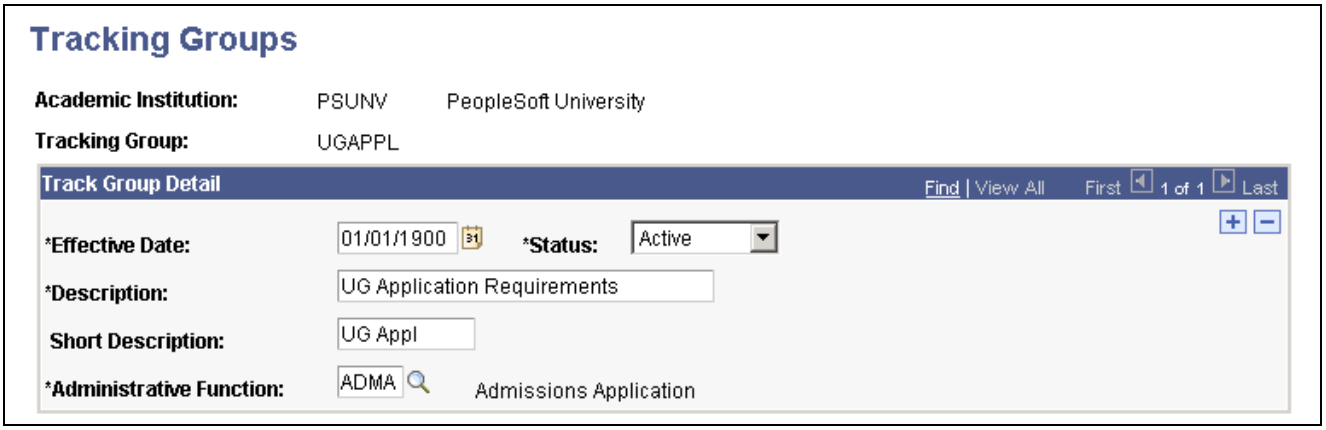
This section discusses how to create a tracking group.

Page Used to Set Up Tracking Groups

Page Name	Object Name	Navigation	Usage
Tracking Groups	TRACK_GRP_TABLE	• Set Up SACR, Common Definitions, Checklists, Tracking Group Table • Campus Community, Checklist, Set up Checklists, Tracking Group Table	Optionally create tracking groups by combining two or more checklists with the same administrative function into one monitoring unit.

Creating a Tracking Group

Access the Tracking Groups page.



Tracking Groups page

Tracking groups are optional, but helpful for monitoring a group of checklists at the same time.

Note. You can assign only one tracking group per checklist, so you might not want to make your tracking groups too broad.

Administrative Function Enter the code for the administrative area with which this tracking group is associated.

Checklists associated with the administrative functions that you select here are the only checklists that will be available in this tracking group.

Setting Up Checklist Templates

To set up checklist templates, use the Checklist Table component (CS_CHKLST_TBL).

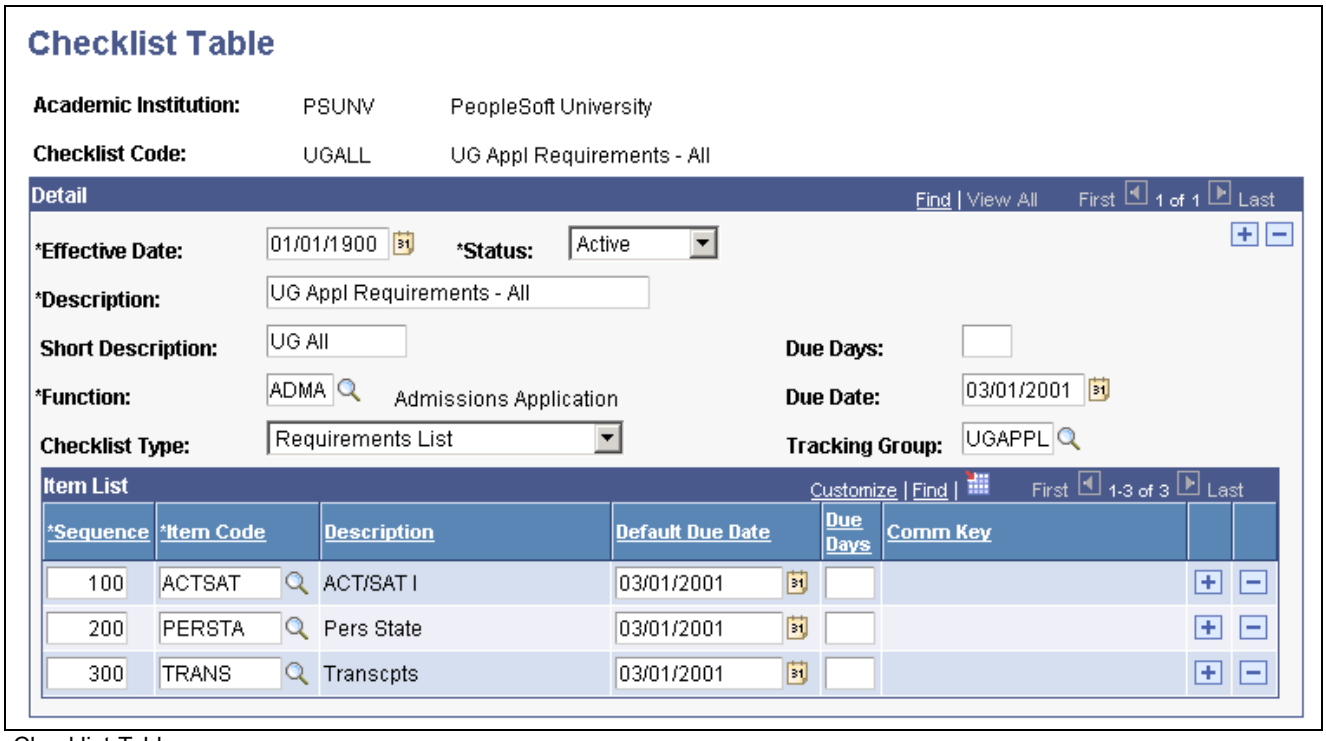
This section discusses how to create a checklist template.

Page Used to Set Up Checklist Templates

Page Name	Object Name	Navigation	Usage
Checklist Table	CS_CHKLST_TABLE	• Set Up SACR, Common Definitions, Checklists, Checklist Table • Campus Community, Checklists, Set up Checklists, Checklist Table	Create checklist templates and assign codes to them.

Creating a Checklist Template

Access the Checklist Table page.



Checklist Table page

Detail

Function Enter the code for the administrative area with which the items for this checklist are associated. The function code controls the item codes that you will be able to select.

Checklist Type Select the type that best describes this checklist.

The following checklist types are delivered with your system as translate values:

(ADC) Condition List

(CML) Communication List

(HIR) Hiring

(MED) Medical

(PRM) Promise

(RQL) Requirements List

(SAL) Staff Assignment List

(TER) Termination

(TRN) Training

(XFR) Transfer

(OTH) Other

You can modify these translate values.

Of the delivered checklists types, the ones most relevant to the management of student administration and contributor relations are:

(CML) Communication List: A list of the communications (for example, letters, brochures, and phone calls) that have occurred with a person over a period of time.

(PRM) Promise: Records the amount and due dates of a person's promise-to-pay.

(RQL) Requirements List: A list of items that a student must accomplish or submit to move to the next step of a process. For example, the list might specify the materials required to complete an application to your institution. You can also use items from a requirements list in the letter generation process to notify students of missing application items.

(SAL) Staff Assignment List: A list of items that a staff member needs to accomplish relative to a particular student.

Due Days Enter the number of days, calculated from the assign date, by which all items on this checklist must be completed.

Due Date The date by which all items on this checklist must be completed.

Tracking Group (Optional) Enter the group to which this checklist should be assigned for monitoring.

Available group codes are from the Tracking Groups page.

Item List

Sequence The number of this item in the list of items for this checklist.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number to reorder the list of checklist items.

Item Code Enter the item code for this checklist item.

The item codes available are those associated with the selected administrative function on the Checklist Item Functions page.

Default Due Date If you know the exact date when the checklist item is due, enter it here.

You can leave the field blank. If the field is blank when you save the record, the system displays the due date from the Detail area of the page as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Due Days If an item is due within a specific number of days rather than on a specific date, enter the number of days here.

You can leave the field blank. If the field is blank when you save the record, the system displays the number of due days from the Detail area of the page as the default due days value for each checklist item. You can override this number, but it must be with a *smaller* number so that the item does not become due after the overall due date of the checklist.

Comm Key When you create a checklist of the default type that is set on the Installation Default - CC page, the Comm Key field becomes available.

Select a Comm Key to assign the specified communications to the individual or organization to which you are also assigning the checklist. When you run the process to generate the letter whose letter code is associated with the Comm Key selected, the process extracts the checklist items listed on the checklist tied to the Comm Key. This enables you to print a list of the items not yet completed. For example, you could list in a letter the remaining items that an applicant needs to submit to complete the application.

See Chapter 31, “Managing Communications,” page 433.

Defining 3C Update/Inquiry Groups

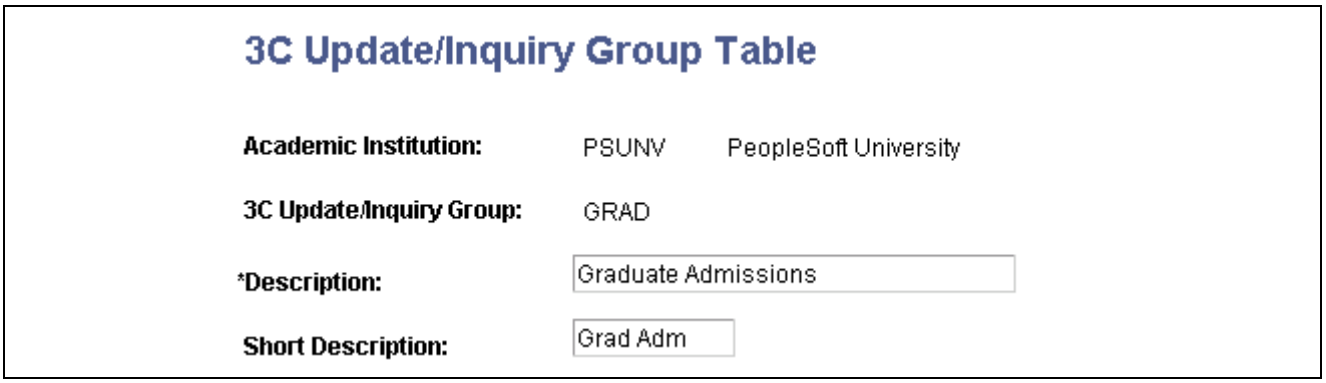
To define 3C Update/Inquiry Groups, use the 3C Update/Inquiry Groups component (GROUP_3C_TBL).

Page Used to Define 3C Update/Inquiry Groups

Page Name	Object Name	Navigation	Usage
3C Update/Inquiry Group	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of IDs who have similar interests and needs.

Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Groups page.



3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a checklist code to create a Checklist 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

Setting Up Checklist 3C Groups

To set up checklist 3C groups, use the Checklist 3C Groups component (CS_CHKLST_3CGRP).

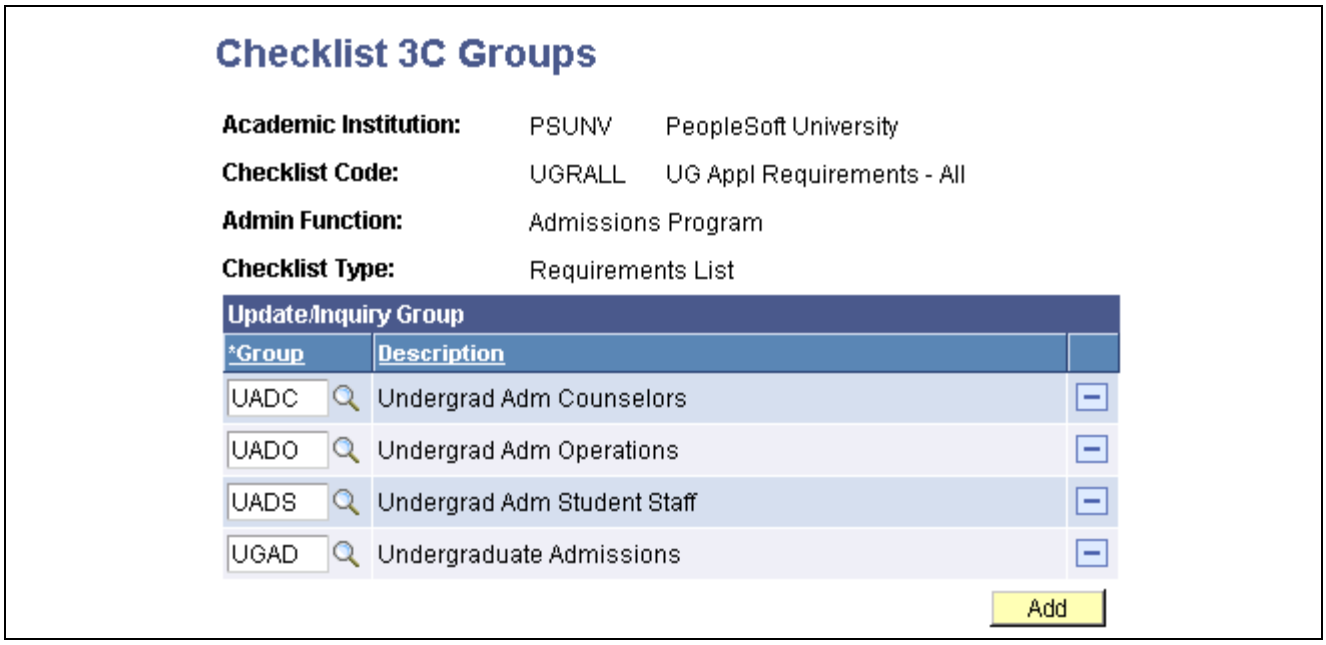
This section discusses how to create a checklist 3C group.

Page Used to Set Up Checklist 3C Groups

Page Name	Object Name	Navigation	Usage
Checklist 3C Groups	CS_CHKLST_3CGRP	• Set Up SACR, Common Definitions, Checklists, Checklist 3C Groups • Campus Community, Checklists, Set up Checklists, Checklist 3C Groups	Create checklist 3C groups to grant security access to checklists in your database.

Creating a Checklist 3C Group

Access the Checklist 3C Groups page.



Checklist 3C Groups page

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

CHAPTER 17

Setting Up Committee Templates

This chapter provides an overview of committee templates and discusses how to set up committee types and roles:

See Also

Chapter 37, "Managing Committee Data," page 559

Understanding Committee Templates

Within most organizations, committees are frequently created that share the same structure and the same member roles; only the set of people who should serve on those committees and their individual names change. Campus Community enables you to define the types of committees that your institution creates, identify the roles that should be on each committee, and then use the types and roles to create templates to help you create and manage committees across your institution.

For example, you can create a template for an undergraduate interviews committee type and associate the roles of chairperson and three interviewers with it. You might want members of this committee type to be recruiters and advisors, in which case you would associate all recruiter and all advisor records with the committee type to provide prompt lists from which to assign individuals to this committee. You then use the template to create a current or ongoing committee and assign individuals to the chair and member roles. You can also specify the dates during which each individual should participate in the committee.

Setting Up Committee Types and Roles

To set up committee types and roles, use the Committee Types/Roles component (COMMITTEE_SETUP).

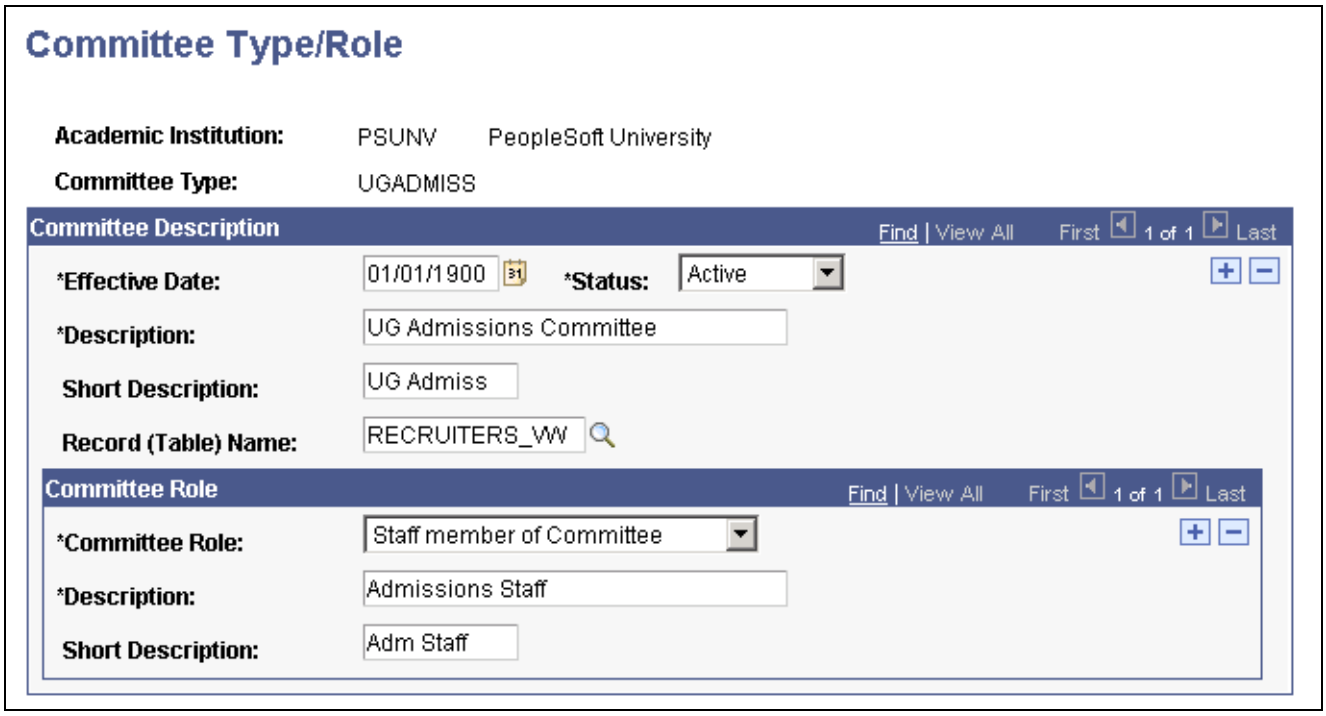
This section discusses how to define a committee type and assign member roles.

Page Used to Set Up Types and Roles

Page Name	Object Name	Navigation	Usage
Committee Type/Roles	COMMITTEE_TABLE	• Set Up SACR, Common Definitions, Committees, Committee Table Types/Roles • Campus Community, Committees, Committee Type/Role	Define a committee type and assign member roles.

Defining a Committee Type and Assigning Member Roles

Access the Committee Type/Roles page.



Committee Type/Roles page

Committee Description

Record (Table) Name Enter the name of the record that contains the types of individuals to make available for assignment to this committee. The selected record provides the prompt list of possible members on the Committee page.

For example, if you create an Undergraduate Interviews committee, and you select the RECRUITERS_VW, each time that you create a committee of the Undergraduate Interviews type, you are prompted to select members from the list of recruiters in your system.

Committee Role

Committee Role Select the role (for example, chair, co-chair, member, student member, and so on) that should always be part of this committee type. You can add as many roles as necessary.

Values for this field are delivered with your system as translate values. You can modify these translate values.

CHAPTER 18

Setting Up Campus Event Planning

This chapter provides an overview of campus events and discusses how to:

- Define campus events.
- Create an event template.

Note. Do not confuse the events described in this chapter with 3C engine events. One attends the events described here. 3C engine events are occurrences associated with data in your system.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes"

Understanding Campus Events

You must define the items that you want to make available for events.

To define events, you:

- Define event types.
- Define event resource codes.
- Define event staff codes.

An event consists of one or more meetings, each of which has its own resources and staff. You can create templates for recurring or similar events by defining the meetings typically required for that type of event. You can then use or modify the template for recurring or similar events that require similar meetings, resources, and staff. Event templates are optional; however, they can be useful guidelines that save time.

Note. You can create only one template per event type.

To create an event template, do the following:

1. Define the meetings for the event type.
2. Assign the resources for each meeting.
3. Assign the type of staff for each meeting.

Defining Campus Events

To define campus events, use the following components: Event Type Table component (EVENT_TYPE_TABLE), Resource Code Table component (RESOURCE_CD_TABLE), and Staff Code Table component (STAFF_CODE_TABLE).

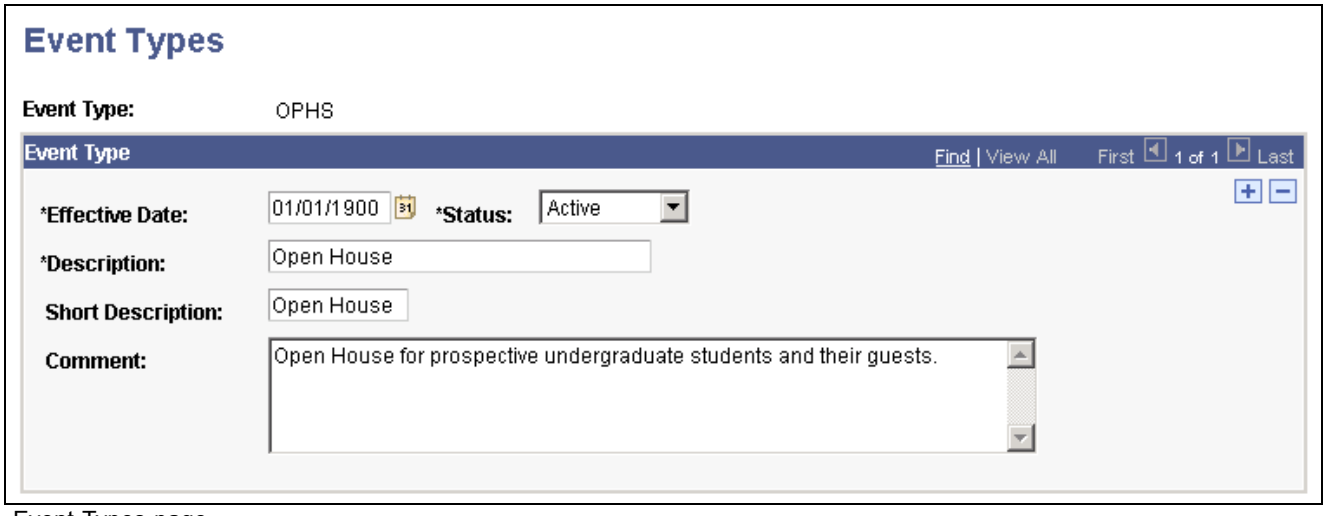
This section discusses how to define events.

Pages Used to Define Campus Events

Page Name	Object Name	Navigation	Usage
Event Types	EVENT_TYPE_TABLE	Campus Community, Campus Event Planning, Set Up Events, Event Type Table	Define the general types of events.
Resource Codes	RESOURCE_CD_TABLE	Campus Community, Campus Event Planning, Set Up Events, Resource Code Table	Review or create codes for the resources to make available for events, such as tables, chairs, brochures, and banners.
Staff Codes	STAFF_CODE_TABLE	Campus Community, Campus Event Planning, Set Up Events, Staff Code Table	Identify and set up the types of staff for events, such as speakers, admissions counselors, tour guides, cooks, and servers.

Defining Event Types

Access the Event Types page.

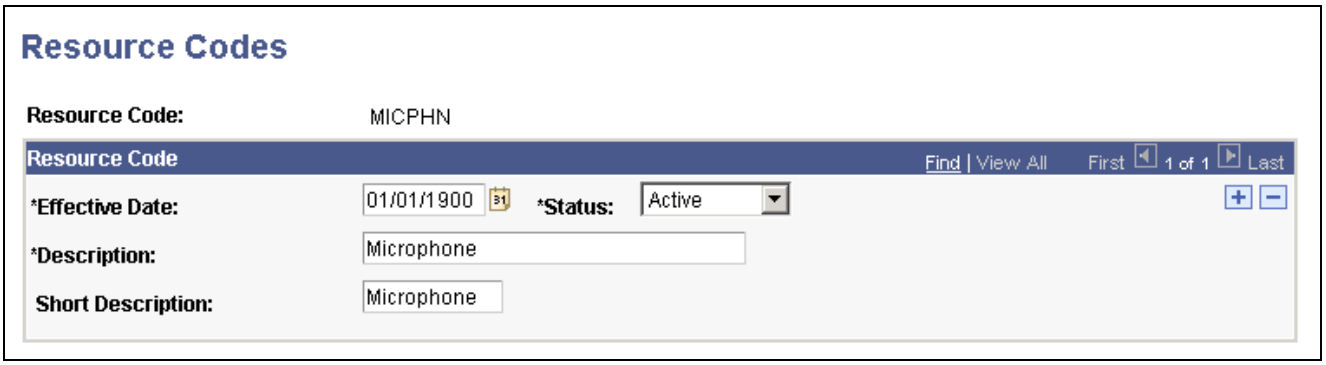


Event Types page

Comment Enter comments to further identify or describe this event type.

Defining Event Resource Codes

Access the Resource Codes page.

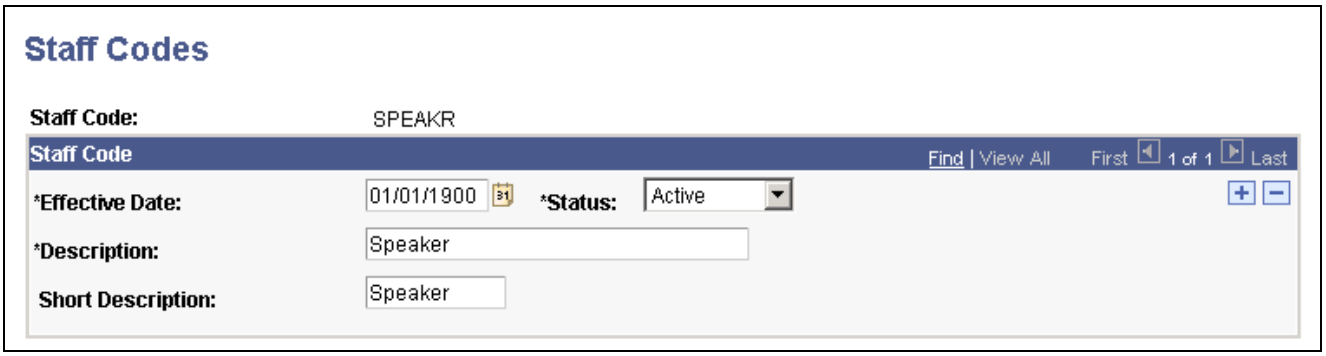


Resource Codes page

Enter information to describe the resource code to create.

Defining Event Staff Codes

Access the Staff Codes page.



Staff Codes page

Enter information to describe the staff code.

Creating an Event Template

To create an event template, use the Event Template component (CAMPUS_EVENT_TMPL).

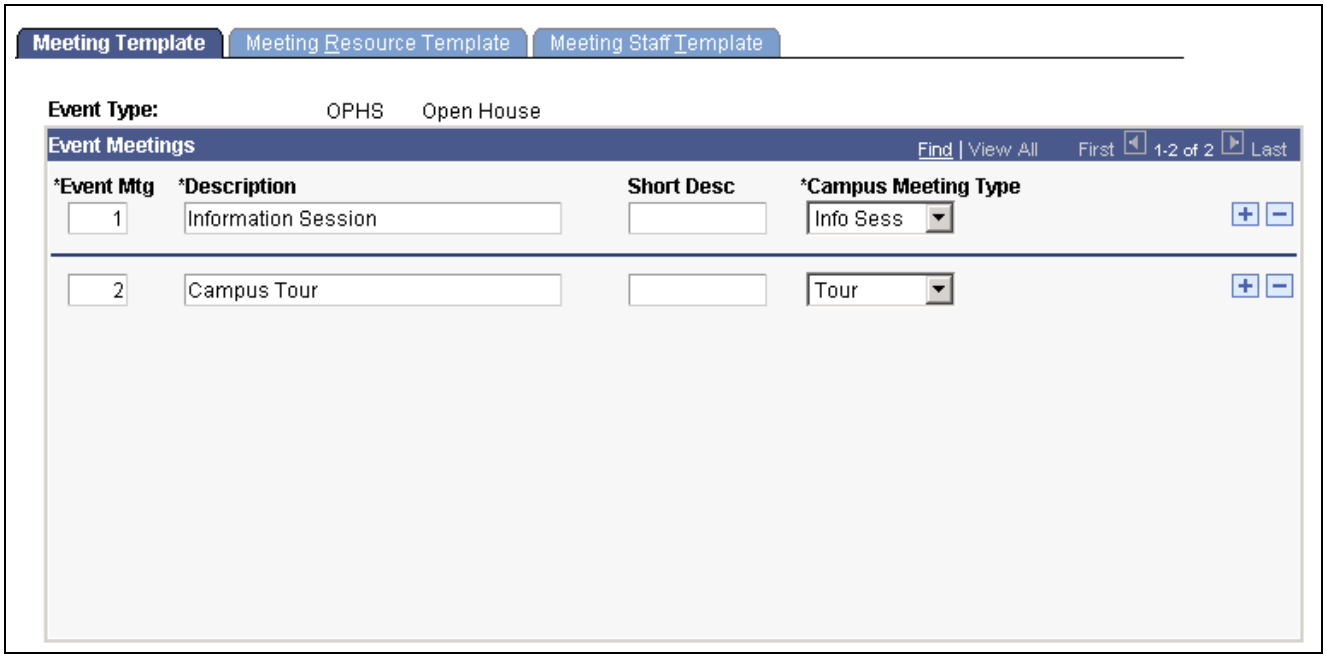
This section discusses how to create an event template.

Pages Used to Create an Event Template

Page Name	Object Name	Navigation	Usage
Meeting Template	MTG_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Template	Identify meetings that comprise that event type.
Meeting Resource Template	MTG_RSRCE_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Resource Template	Assign resources that are required for each meeting in the event.
Meeting Staff Template	MTG_STAFF_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Staff Template	Designate the type of staff for each meeting in the event.

Creating an Event Meeting Template

Access the Meeting Template page.



Meeting Template page

Event Meetings

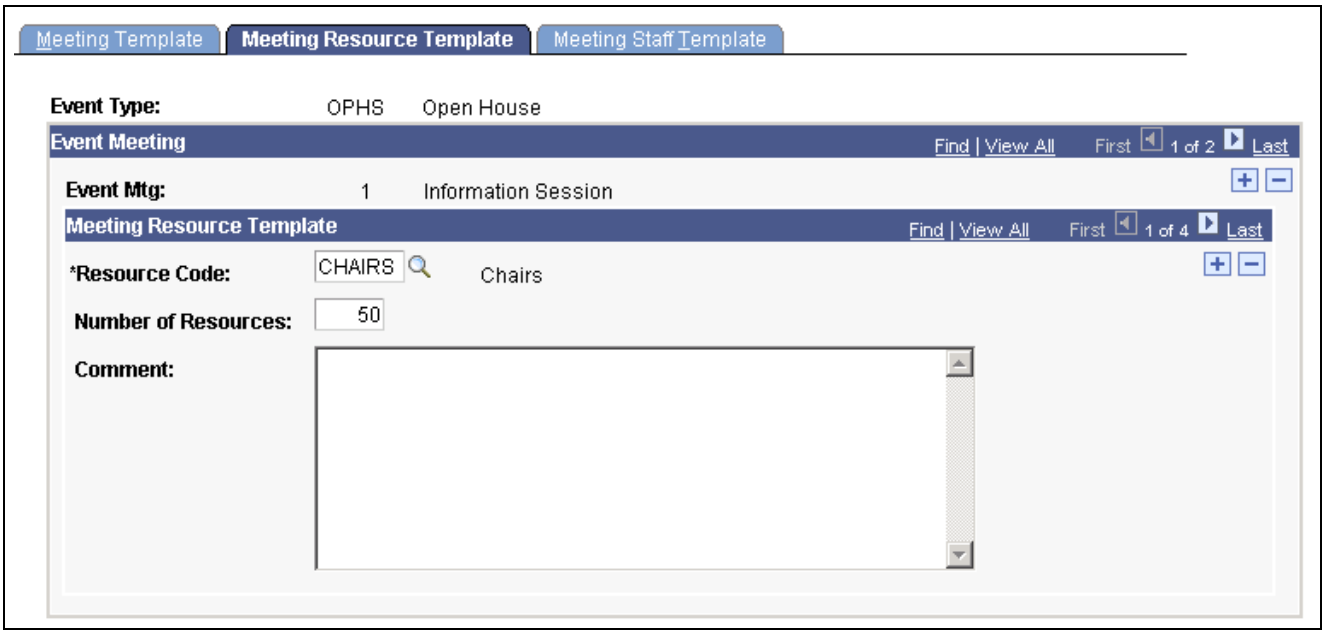
Event Meeting The system enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.

Campus Meeting Type Select the meeting type that best describes this meeting.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Assigning the Meeting Resources

Access the Meeting Resource Template page.



Meeting Resource Template page

Meeting Resource Template

Resource Code Enter the type of resource that is required for this meeting.

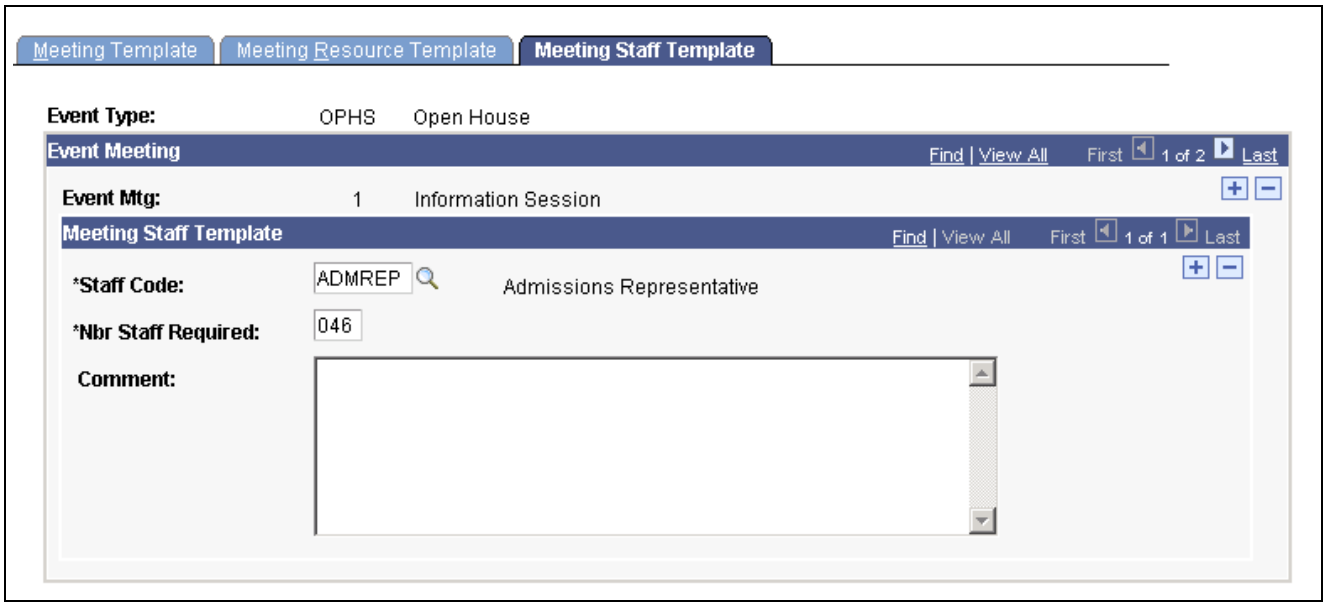
Available resource codes are from the Resource Codes page.

Number of Resources Enter the number or quantity of the resource required for this meeting.

Comments Enter comments to further identify or describe this resource.

Assigning the Type of Meeting Staff

Access the Meeting Staff Template page.



Meeting Staff Template page

Meeting Staff Template

Staff Code Enter the type of staff required for the meeting.

Available staff codes are from the Staff Codes page.

Number of Staff Enter the total number of this type of staff required for the meeting

Comment Enter comments to further describe or identify the staff required for the meeting.

CHAPTER 19

Managing IDs

This chapter provides an overview of ID management and discusses how to:

- Create IDs.
- Delete individual IDs.
- Change individual IDs.
- Delete organization IDs.
- Change an external organization ID.
- Update ID types.

See Also

Chapter 3, "Setting Up ID Delete Control," Understanding ID Delete Control, page 31

Chapter 20, "Searching for Records and Using Search/Match," page 181

Chapter 24, "Managing Identification Data," Entering External System IDs, page 280

Understanding ID Management

Unique IDs are vital to PeopleSoft Enterprise Campus Solutions. When you add an individual or organization, the system creates a record and assigns the next available unique ID. The unique ID remains associated with that individual or organization unless or until you change or delete it.

When you want to add, update, or delete data about that individual or organization, use the unique ID to narrow your search and save time accessing the record.

See Chapter 20, "Searching for Records and Using Search/Match," page 181.

To prevent arbitrary or accidental deletion of IDs, assign priority control data. Priority control data prevents users from deleting any ID that contains that data without first evaluating the data. Priority control data also prevents users from having to ask the system administrator or other individuals with the appropriate level of system security to delete the data.

Use the PeopleSoft Process Scheduler to delete or change individual IDs. You can select one ID or several IDs at the same time. When you run the process, the system creates an ID Change/Delete Process Log for each ID, showing how many rows were deleted for that individual and listing the records and fields that it updated. The log also indicates the administrative User ID that either deleted or changed an individual ID.

Warning! When you delete an ID, the system deletes not only the ID number, but all key data that is associated with that ID throughout the system. This loss of data could affect other departments. If the ID contains priority data, coordinate the need to delete it with other departments before deleting the priority data and the ID.

See Chapter 3, "Setting Up ID Delete Control," page 31.

You can change system-generated IDs, but you must change and manage them manually. For example, you might want to change the system-generated IDs of 0000012, 0000035, and 0000062 to the IDs of PRES01, PRES02, and PRES03 to group those specific individuals within a list that only the president of the institution should manage. When you change them, the original system-generated IDs drop from the list of numbered IDs and appear instead as in a group of initial alpha character IDs. That is, the numbered ID list shows 0000033, 0000034, 0000036, 0000037, but the ID of 0000035 that you changed is not listed. That individual is now PRES02 in the list of IDs that are PRES01, PRES02, and PRES03.

Warning! Changes that you make to an ID affect the ID throughout the system, including other departments. Coordinate the need to change the ID with other departments before making the change.

You can also determine the last ID assigned, and determine or adjust the maximum length of system-generated IDs using the installation pages.

Creating IDs

When you add an individual or organization to your database, the system creates a record and assigns the next available unique ID.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," page 195.

See Chapter 34, "Adding Organizations to Your Database," page 511.

Deleting Individual IDs

This section discusses how to delete individual IDs.

Prerequisites

Identify priority control data to prevent the unwanted deletion of individual and organization IDs.

See Also

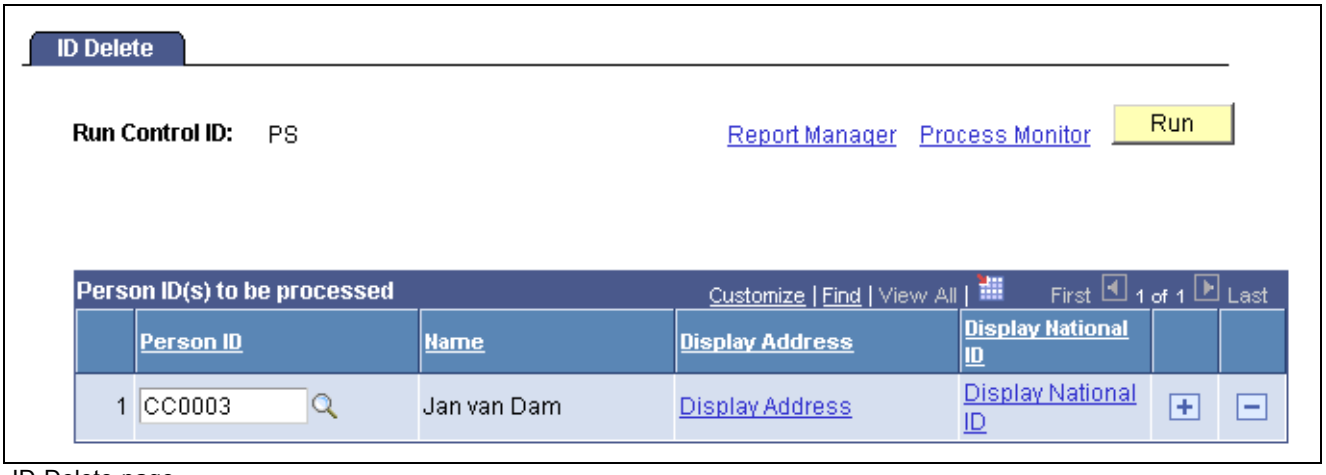
Chapter 3, "Setting Up ID Delete Control," page 31

Pages Used to Delete Individual IDs

Page Name	Object Name	Navigation	Usage
ID Delete	RUNCTL_ID_CHANGE	• Campus Community, Personal Information, ID Management, ID Delete • Set Up SACR, System Administration, Database Processing ID Delete	Select individual IDs to delete.
Display Address	ADDRSS_DISPLAY_SEC	Click the Display Address link on the ID Delete page.	Review an individual's address to confirm that the ID is the correct one to delete.
Display National ID	NID_DISPLAY_SEC	Click the Display National ID link on the ID Delete page.	Review an individual's national ID to confirm that the ID is the correct one to delete.
ID Change/Delete Process Log	HR_PER502_LOG	• Campus Community, Personal Information, ID Management, ID Change/Delete Process Log • Set Up SACR, System Administration, Database Processing, ID Change/Delete Process Log	Review an individual's national ID to confirm that the ID is the correct one to delete.

Selecting Individual IDs to Delete

Access the ID Delete page.



ID Delete page

Enter information and then run the Change/Delete Person ID process.

Note. This page is also used in PeopleSoft Enterprise HRMS.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Changing and Deleting IDs.

Person ID(s) to be processed

Person ID and **Name** Enter the ID that you want to delete. The system displays the name of the person with that ID.

Display Address Click this link to access the page on which you can review address data to further determine if this is the correct ID to delete.

Display National ID Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to delete.

After running the Change/Delete Person ID process, you can review the updated records for the specific individual on the ID Change/Delete Process Log.

See Chapter 19, "Managing IDs," Reviewing Changed or Deleted Individual ID Records, page 175.

Changing Individual IDs

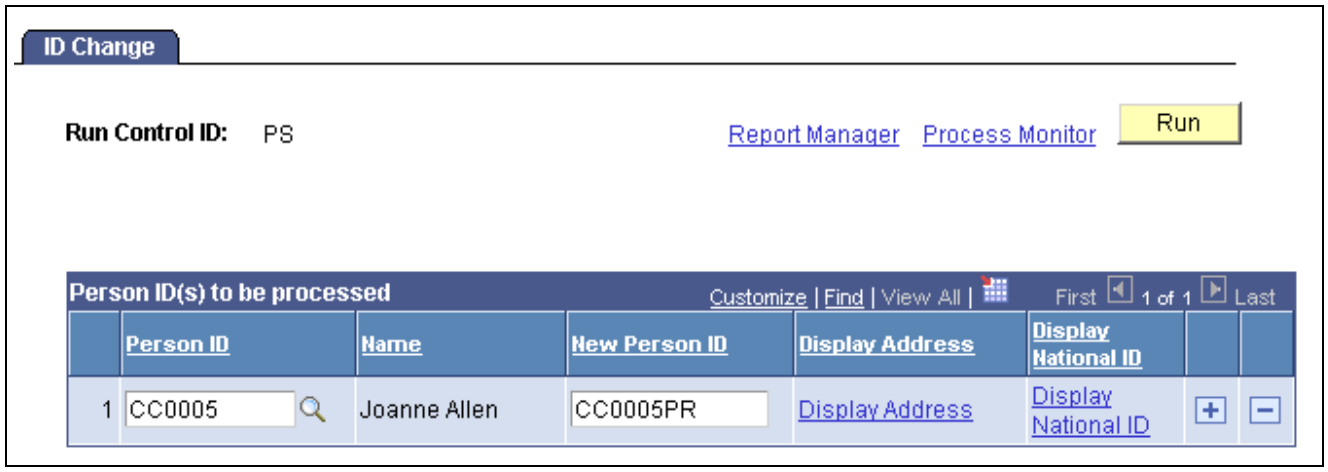
This section discusses how to change an individual ID.

Page Used to Change Individual IDs

Page Name	Object Name	Navigation	Usage
ID Change	RUNCTL_ID_CHANGE	• Campus Community, Personal Information, ID Management, ID Change • Set Up SACR, System Administration, Database Processing, ID Change	Change an individual ID.

Changing an Individual ID

Access the ID Change page.



ID Change page

Enter information to change one or more individual IDs, and then use the PeopleSoft Process Scheduler to run the Change/Delete Person ID process. When you run the process, the system changes the IDs that you list here. You can review the records updated for the individuals on the ID Change/Delete Process Log.

Note. This page is also used in PeopleSoft Enterprise HRMS.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Changing and Deleting IDs.

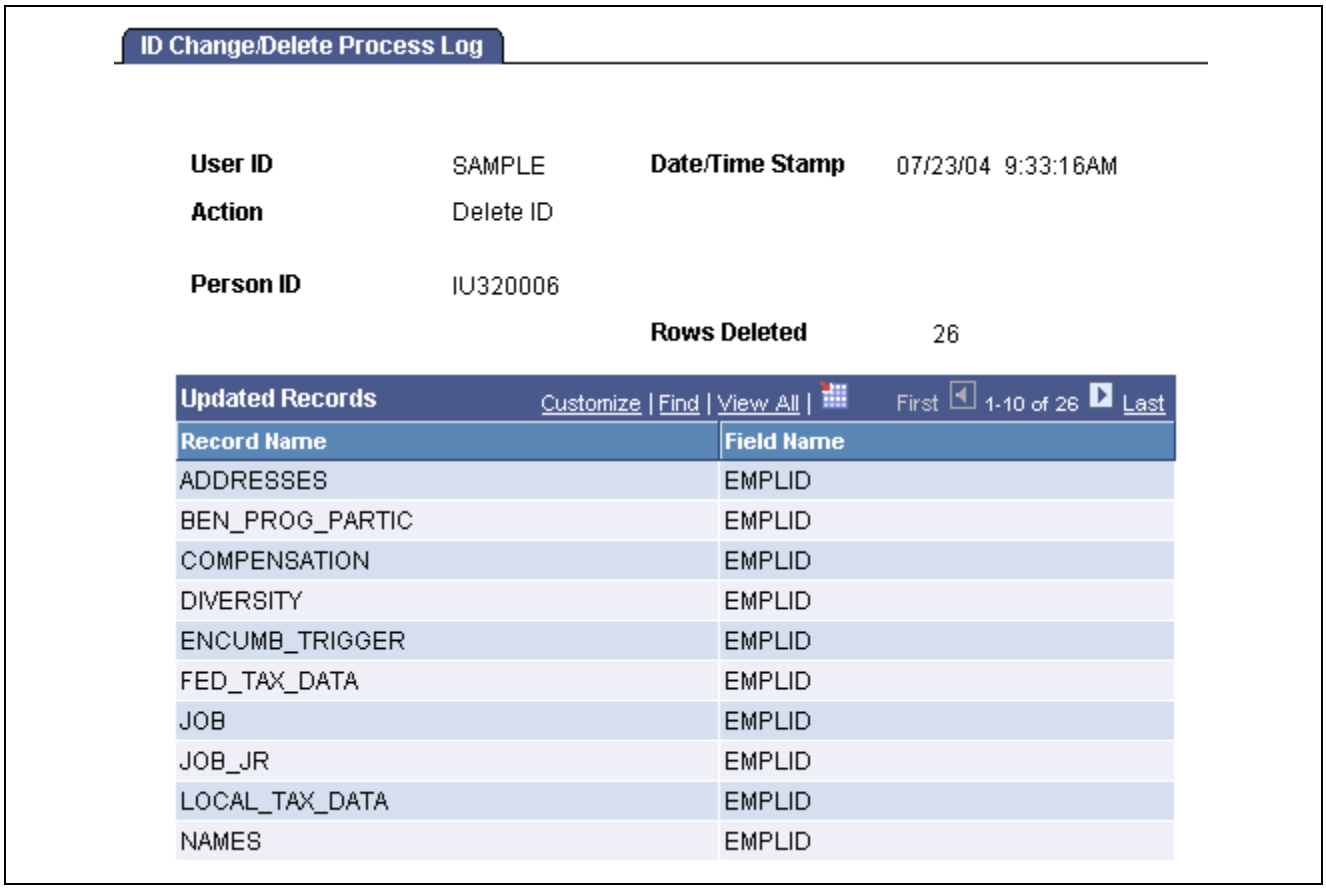
New Person ID Enter the new ID to assign to this individual; the new ID replaces the individual's existing ID.

Display Address Click this link to access the Display Address page, on which you can review the individual's address data to further determine if this is the correct ID to change.

Display National ID Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to change.

Reviewing Changed or Deleted Individual ID Records

Access the ID Change/Delete Process Log page.



ID Change/Delete Process Log page

Information on this page is display-only. You cannot enter or edit data here. The information displayed lists changes made as the result of the Change/Delete Person ID process, which is run from the ID Delete or ID Change pages.

Deleting Organization IDs

This section provides an overview of organization ID deletion and discusses how to select the organization ID to delete.

Understanding Organization ID Deletion

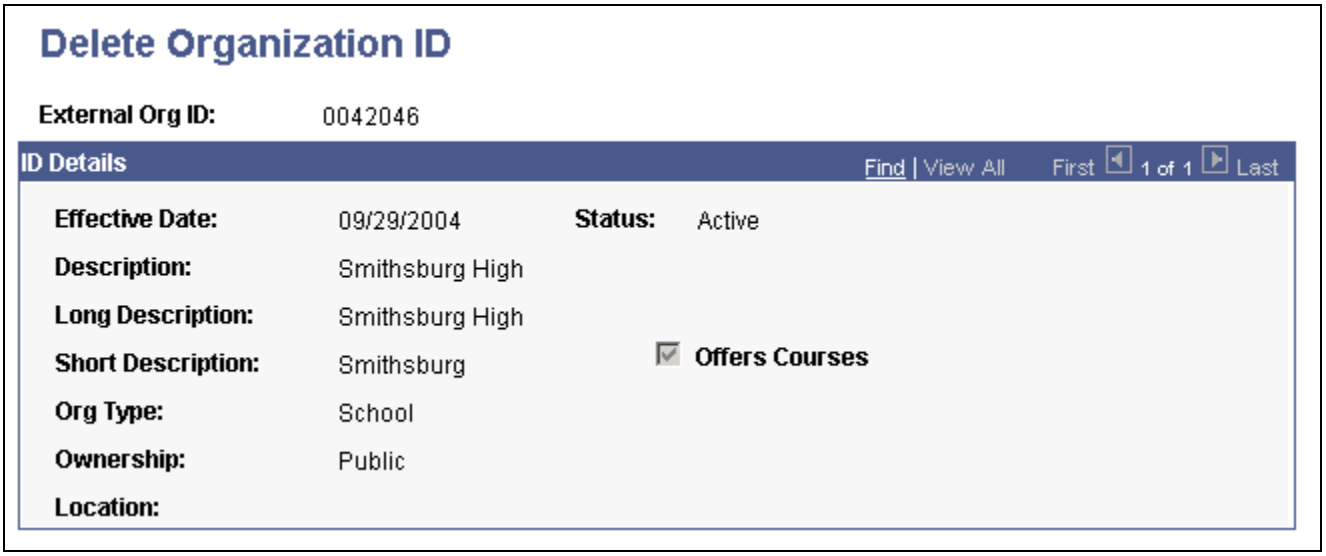
Within PeopleSoft Enterprise Campus Solutions, when you try to delete an organization ID that contains data in any of the priority records that are specified on the ID Delete Control page, the system does not allow the deletion. Instead, it displays a message that lists the specific records and key fields that contain priority data for the ID. To delete the ID, you or your system administrator must first remove the associated priority data.

Page Used to Delete Organization IDs

Page Name	Object Name	Navigation	Usage
Delete Organization ID	ORG_ID_DELETE	Campus Community, Organization, Delete Organization ID	Select an organization ID to delete.
Change Organization ID	ORG_ID_CHANGE	Campus Community, Organization, Change Organization ID	Select an organization ID to change.

Selecting the Organization ID to Delete

Access the Delete Organization ID page.



Delete Organization ID page

Description, Org Type (organization type), **Ownership,** and **Location**

Review information here to verify that this is the correct ID to delete. When you save the page, the organization ID will be deleted.

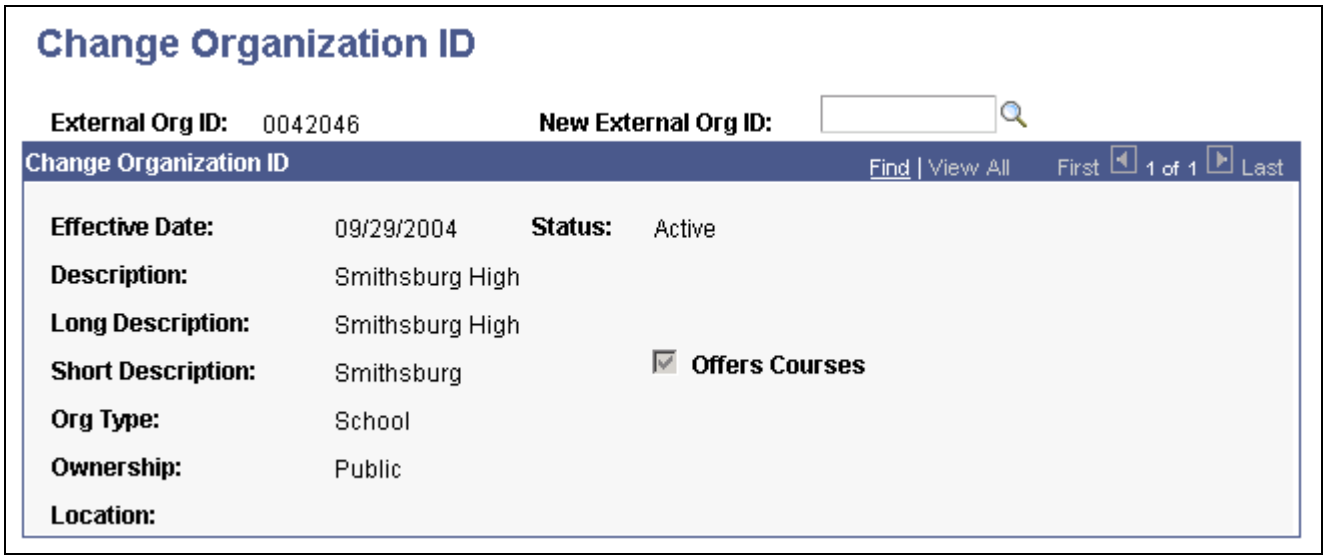
Note: Only one organization ID can be deleted at a time.

Changing an External Organization ID

This section discusses changing an organization ID.

Selecting the Organization ID to Change

Access the Change Organization ID page.



Change Organization ID page

New External Org ID (new external organization ID) Enter the external organization ID to assign. You can enter a nonexisting ID or choose from the list of existing IDs.

Updating ID Types

This section provides an overview of ID type updates and discusses how to run the Update ID Type process.

Understanding ID Type Updates

By storing each ID type, whether it be for a person or an organization, in a single table (ID_TYPE_TBL record) and associating an indicator flag value to each, you can use individual or organization IDs as a single ID field in applications that are common to both individuals and organizations.

For example, when using the 3C features, you can add a communication to a person by adding a communication to a person ID or you can add a communication to an organization by adding a communication to an organization ID. The Communication feature is the same for both types of IDs because they can be combined inside a common ID (COMMON_ID). Running the Update ID Type process inserts the person ID and the organization ID into the ID_TYPE_TBL and assigns to each a type (either person or organization) by which to differentiate them.

Page Used to Update ID Types

Page Name	Object Name	Navigation	Usage
Update ID Type	RUNCTL_CCIDTYPE	• Campus Community, Personal Information, ID Management, Update ID Type • Set Up SACR, System Administration , Database Processing, Update ID Type	Run the Update ID Type process to associate the correct ID type—either person or organization—with each ID in your system.

Running the Update ID Type Process

Access the Update ID Type run control page to run the Update ID Type process (CCIDTYPE SQR). Use PeopleSoft Process Scheduler to run the Update ID Type process.

CHAPTER 20

Searching for Records and Using Search/Match

This chapter provides overviews of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discusses how to use Search/Match.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Enterprise Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft Enterprise HRMS Talent Acquisition Manager) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

See Also

Chapter 4, “Setting Up Search/Match,” Automatic Search, page 37

Understanding Search Box Searches

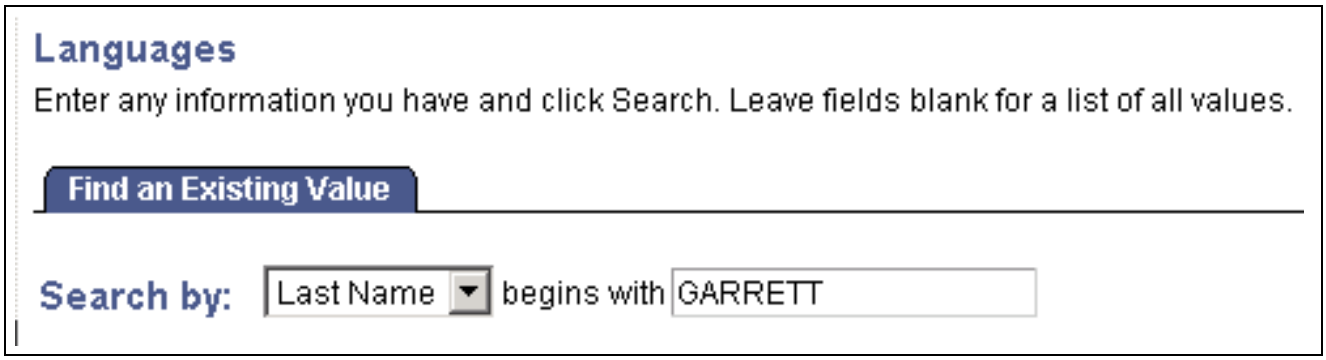
To view or update data on an existing record, select the menu item for the type of data to view and enter key criteria on the related search box page. Person ID (or just ID) is often the default key criteria. If you enter nothing and click OK, the system searches for all records with IDs, However, because all records have IDs, the list is much too large for the system to display at one time. You must enter some of the characters of the ID, or any of the other key criteria.

For example, you might want to determine which languages Bernice Smith speaks proficiently enough to translate. You would select Campus Community, Personal Information, Biographical, Personal Attributes, Languages. A search box page appears with a list of the search options for people, including: ID, campus ID, national ID, first name and last name. (Different or additional search criteria might appear depending on the type of data associated with the menu item that you select, or if you are searching for records for organizations.)

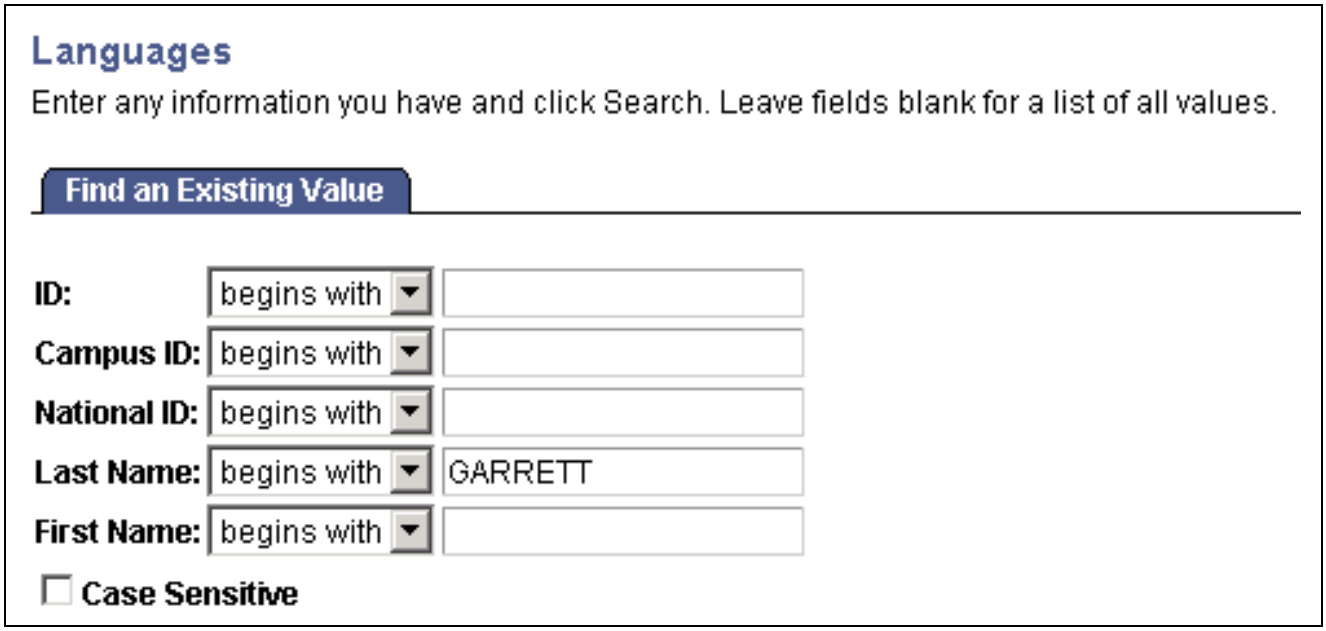
To narrow your search and minimize the system's record retrieval time, enter either the individual's unique ID or the national ID. If you do not know either of these, enter any of the criteria that you know. For example, you could select the Last Name option and enter *Smith.*

The system searches for and retrieves all records containing the data that you enter. It lists the resulting records in rows at the bottom of the page. Select the row with the specific data that you require. For example, if you enter only *Smith* in the Last Name field, rows for all individuals with the last name of *Smith* are listed in the search results. You would select the row with the first name *Bernice.*

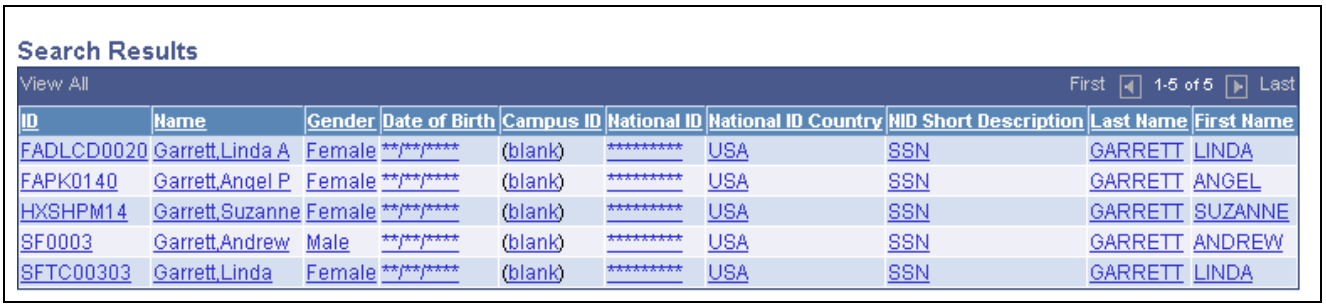
If you want to search on more fields or want to search on all of the data that you know about an individual to control the search, you can click Advanced Search and enter that data.



Using a search box page in Basic Search mode



Using a search box page in Advanced Search mode



Search Results

View All First 1-5 of 5 Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
FADLCD0020	Garrett,Linda A	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	LINDA
FAPK0140	Garrett,Angel P	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	ANGEL
HXSHPM14	Garrett,Suzanne	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	SUZANNE
SF0003	Garrett,Andrew	Male	**/**/****	(blank)	*********	USA	SSN	GARRETT	ANDREW
SFTC00303	Garrett,Linda	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	LINDA

Viewing search box search results from Basic Search or Advanced Search modes

The values for theDate of Birth and National ID fields in the sample page are masked. You can choose to mask, partially mask, or fully display result field values using demographic data access (DDA) security.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Securing Campus Community," Applying Demographic Data Access Security.

Understanding Search/Match

Search/Match enables you to define search parameters that administrative users can use to determine whether a potential duplicate ID exists in the database.

See Chapter 4, "Setting Up Search/Match," page 35.

Using Search/Match

This section provides an overview of Search/Match, lists prerequisites, and discusses how to:

- Select criteria for a search.
- View search results.
- Determine relations with an institution.

Prerequisites

Before you can use Search/Match, you must set up Search/Match.

See Also

Chapter 4, "Setting Up Search/Match," page 35

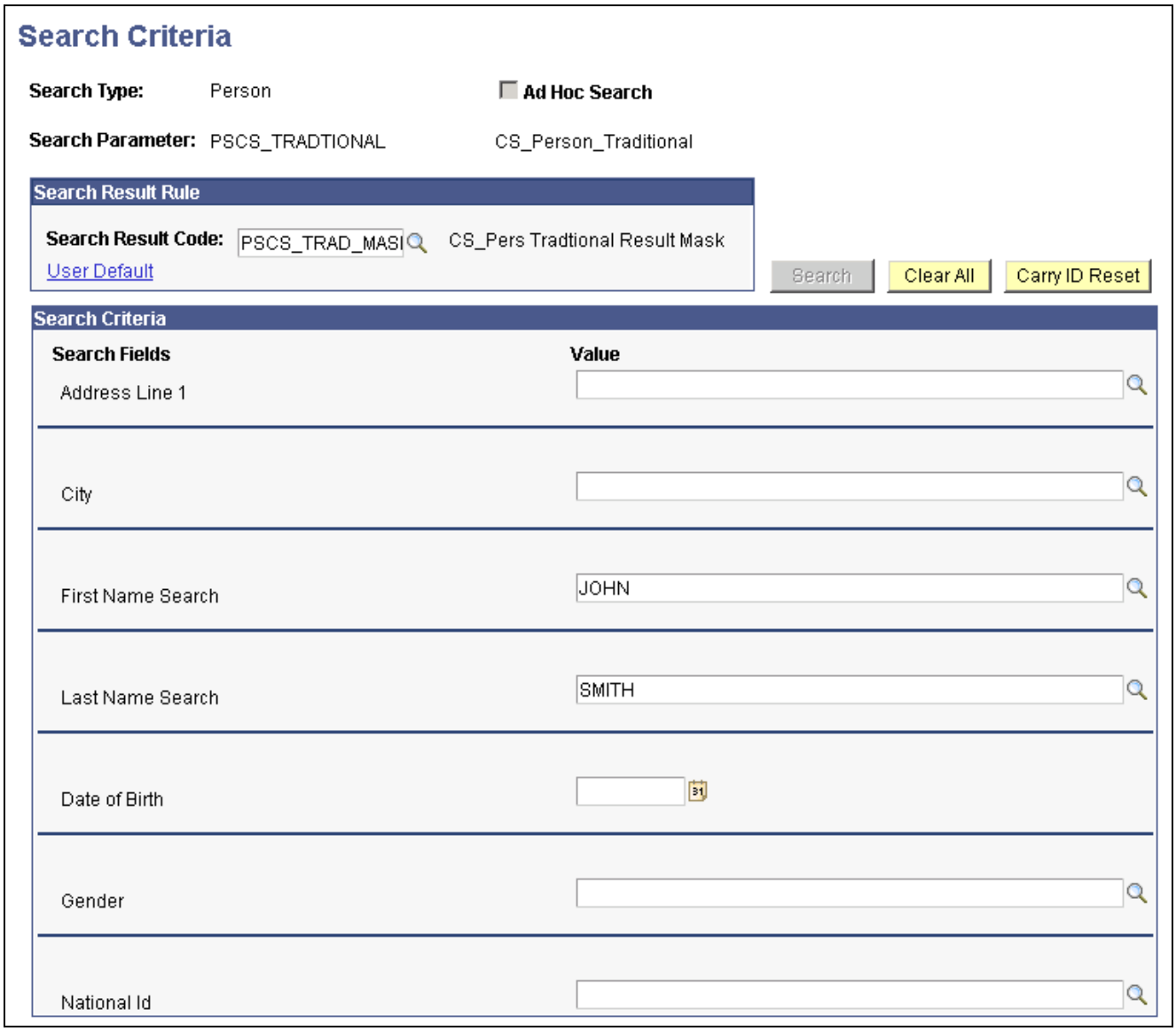
Pages Used for Search/Match

Page Name	Object Name	Navigation	Usage
Search Criteria	HCR_SM_SEARCH	• Campus Community, Personal Information, Search/Match, Search Criteria • Campus Community, SEVIS, Search Tools, Search/Match, Search Criteria • Campus Community, Organization, Search for Organization, Search Criteria • Set Up SACR, System Administration, Utilities, Search/Match, Search/Match, Search Criteria • Student Admissions, Application Entry, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.
Search Criteria (continued)	HCR_SM_SEARCH	• Student Admissions, Application/Transcript Loads, Search/Match, Search Criteria • Student Admissions, External Test Score Processing, Search/Match, Search Criteria • Student Recruiting, Maintain Prospects, Search/Match, Search Criteria • Student Recruiting, Student Recruiters, Search/Match, Search Criteria • Student Recruiting, External Test Score Processing, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.

Page Name	Object Name	Navigation	Usage
Search Criteria (continued)	HCR_SM_SEARCH	• Contributor Relations, Constituent Information, Organizations, Search for Organization, Search Criteria • Contributor Relations, Constituent Information, People, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.
Default Search Result	HCR_SM_USERDFLT	Click the User Default link on the Search Criteria page	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results	HCR_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of a manual search and investigate potential duplicate IDs. **Note.** Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Selecting Criteria for a Search

Access the Search Criteria page.



Search Criteria page (1 of 2)

Search Criteria page (2 of 2)

Search Type The system displays the search type *(Person* or *Organization)* selected to access the page. If you have licensed PeopleSoft Enterprise HRMS Talent Acquisition Manager, you could have selected *Applicant.*

Search Parameter Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page allows you to select only the search parameters to which your security roles permit you access.

Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, you can save it prior to accessing the Search/Match page by clicking the Save Search Criteria link on the search dialog page. Then, in the future, you can select it from the Use Saved Searchprompt.

Ad Hoc Search The system selects this to indicate that the Search Parameter code is set to perform a custom ad hoc search.

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

For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an Operand field appears for each search field. The Operand field enables you to perform a search that begins with, contains, or equals the search value that you enter.

Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear.

See Chapter 4, "Setting Up Search/Match," Defining Search Parameters, page 41.

Search Result Rule

Search Result Code Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent that you are looking for

User Default Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type.

The system permits one default search result code per search type for each user ID.

Carry ID Reset Click to reset a carried ID to *New.*

On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click Carry ID Reset, the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs.

Search Criteria

Search Fields The system displays each of the search fields associated with the search parameter that you selected.

Operand These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the Ad Hoc Search check box and hides the Search by Order Number area of the page.

Select the operand to perform the search. The valid values are *Begins With, Contains,* and *Equals.* These values are delivered as translate values and should not be changed.

Value For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

Clear All Click this button to clear all entries in the Value fields.

Search Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page.

Note. When you click Search, the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the Selective Search button for that order number.

Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

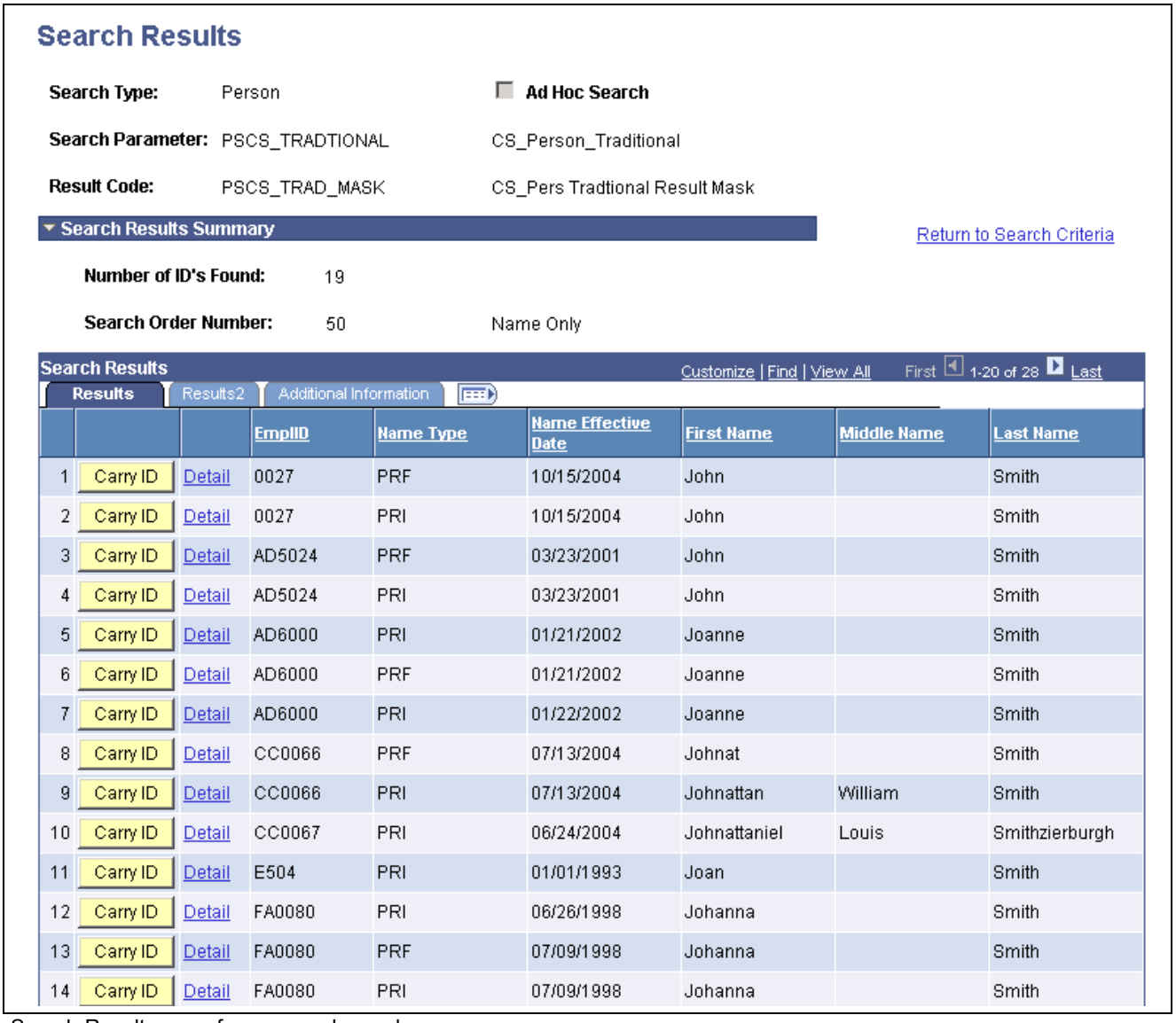
When you enter criteria in the Value fields, the Selective Search button for the search order defined with the fields becomes available.

Click the Selective Search button to conduct specific searches.

When the search is complete, the system transfers you to the Search/Match Results page.

Viewing Search Results

Access the Search Results page.



Search Results

Search Type: Person — Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL — CS_Person_Traditional

Result Code: PSCS_TRAD_MASK — CS_Pers Tradtional Result Mask

Search Results Summary — Return to Search Criteria

Number of ID's Found: 19

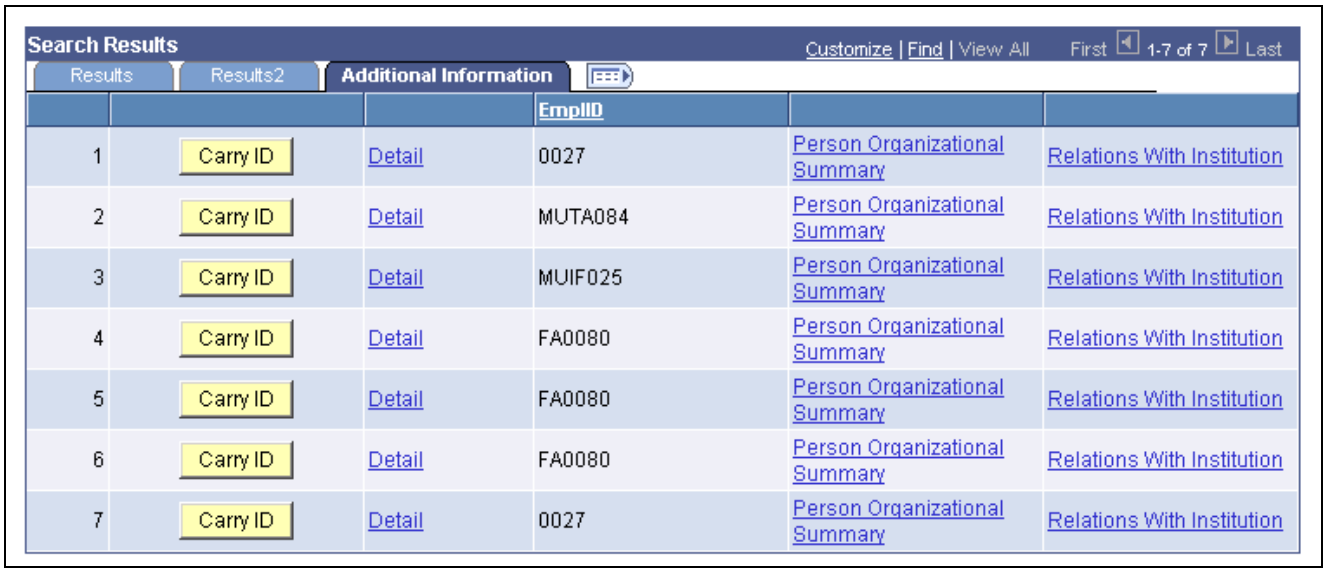
Search Order Number: 50 — Name Only

Search Results — Customize | Find | View All — First 1-20 of 28 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith
3	Carry ID	Detail	AD5024	PRF	03/23/2001	John		Smith
4	Carry ID	Detail	AD5024	PRI	03/23/2001	John		Smith
5	Carry ID	Detail	AD6000	PRI	01/21/2002	Joanne		Smith
6	Carry ID	Detail	AD6000	PRF	01/21/2002	Joanne		Smith
7	Carry ID	Detail	AD6000	PRI	01/22/2002	Joanne		Smith
8	Carry ID	Detail	CC0066	PRF	07/13/2004	Johnat		Smith
9	Carry ID	Detail	CC0066	PRI	07/13/2004	Johnattan	William	Smith
10	Carry ID	Detail	CC0067	PRI	06/24/2004	Johnattaniel	Louis	Smithzierburgh
11	Carry ID	Detail	E504	PRI	01/01/1993	Joan		Smith
12	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
13	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
14	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith

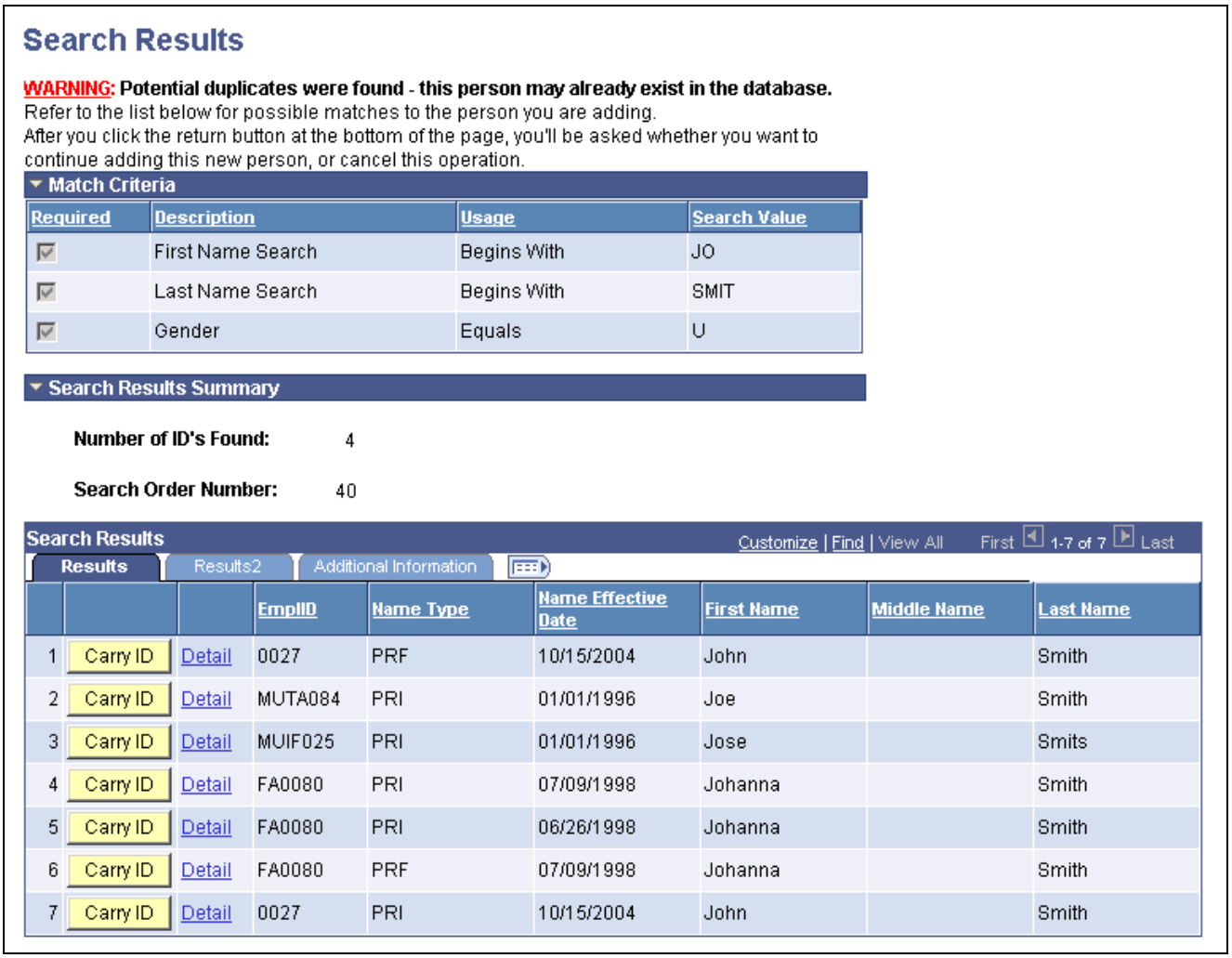
Search Results page for a manual search



Search Results page, Additional Information tab (for an automatic search)

When you enter criteria on the Search Criteria page and click Search or any of the search by order number Selective Search buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that allows creation of IDs. When you try to add an ID on a component that is set up that way and Search/Match detects potential duplicates at save time, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data entered to create the ID and what where the data used to perform the automatic search.



Search Results

WARNING: Potential duplicates were found - this person may already exist in the database.
Refer to the list below for possible matches to the person you are adding.
After you click the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

Match Criteria

Required	Description	Usage	Search Value
☑	First Name Search	Begins With	JO
☑	Last Name Search	Begins With	SMIT
☑	Gender	Equals	U

Search Results Summary

Number of ID's Found: 4

Search Order Number: 40

Search Results — Customize | Find | View All — First 1-7 of 7 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	MUTA084	PRI	01/01/1996	Joe		Smith
3	Carry ID	Detail	MUIF025	PRI	01/01/1996	Jose		Smits
4	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith
5	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
6	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
7	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith

Search Results page, Results tab (automatic search)

See Chapter 4, "Setting Up Search/Match," Automatic Search, page 37.

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click Carry ID to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Number of ID's Found: Displays the number of IDs that met the search criteria.

This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

Search Order Number Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Carry ID Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.

Detail The Detail link appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results, Additional Information Tab

This tab appears only when the search type is *Person.*

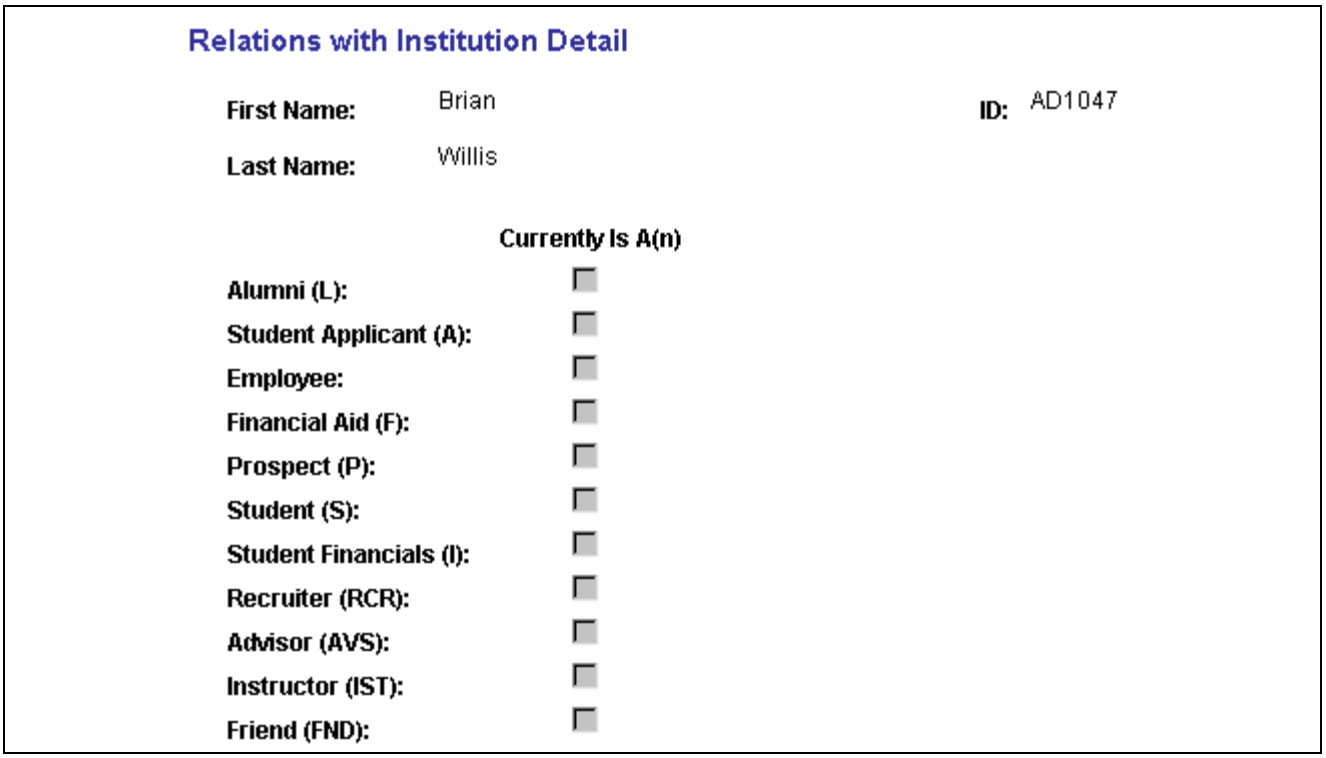
Person Organizational Summary Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.

Relations With Institution Click to access the Campus Solutions Relations With Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Note. The Relations With Institution link appears only if *Student Administration* or *Contributor Relations* is selected on the Installation Table (INSTALLATION_TB1) page.

Determining Relations with an Institution

Access the Relations With Institution Detail page.



Relations with Institution Detail page

Currently Is A(n) When selected, indicates that the individual currently has the associated relation to your institution.

Note. PeopleSoft Enterprise Contributor Relations uses the abbreviations on this page in its CR search.

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Managing Constituent Data," Searching for People

CHAPTER 21

Adding a Person in PeopleSoft Enterprise Campus Solutions

To create records in your PeopleSoft Enterprise Campus Solutions database, you add a person record or an organization record. This chapter discusses how to add person records for students and other nonpaid individuals. Use PeopleSoft Enterprise Human Resources Management (HRMS) to enter records for employees and contingent workers.

Note. If you license PeopleSoft Enterprise HRMS, you should read the HRMS Administer Workforce documentation for adding a person and become familiar with the difference and implications of adding records for employees, contingent workers, and persons of interest. Persons of interest are individuals who do not have or need a job record in your PeopleSoft database. Students are persons of interest.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources"

Chapter 34, "Adding Organizations to Your Database," page 511

Understanding Identification Assignment

When you open the Add a Person component, the system requests a person ID. You can assign IDs two ways:

- Automatically

  If you use automatic ID assignment, the system adds IDs sequentially as you add new people.

  The system maintains the last assigned ID on the Installation Table - Last ID Assigned page.

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the Starting Number for System-Assigned Numbers.

- Manually

  You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

  Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

Note. To avoid maintaining two different sets of IDs, you should either always assign them manually or always let the system assign them.

See Also

Chapter 3, “Setting Up ID Delete Control,” page 31

Chapter 19, “Managing IDs,” page 171

Adding an Individual to Your Database

To add an individual to your system, you must create a personal information record for that individual. If you use automatic ID assignment, when you enter data and save the record, the system assigns the next available sequential ID to that individual and adds the record to your database. Before adding an individual, however, you should run the Search/Match process to determine if a record already exists for that individual.

Important! When you add an individual to your database and save the new value, the system performs an automatic search to determine if a duplicate record already exists. This automatic search uses the search/match criteria established by your institution. It notifies you that a duplicate is detected, but it does not give you the opportunity to identify the duplicates. Use the Search/Match feature to help detect and identify duplicates.

See Chapter 4, “Setting Up Search/Match,” page 35.

See Chapter 20, “Searching for Records and Using Search/Match,” page 181.

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

See *Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, “Understanding Effective Dates”*

You can update personal information for an individual on the same Biographical Details page, but in update/display mode after adding the individual.

To add an individual to your database using automatic ID assignment:

1. Select Campus Community, Personal Information, Add/Update a Person.
2. Click the Add a New Value link at the bottom of the Add/Update a Person search page.

   The Add a New Value search page appears with the word *New* in the ID field.

   Warning! If you overwrite the word *NEW* in the ID field on the Add a New Value search page, and manually enter an ID for the new person, you will disrupt the autonumbering sequence included with your system. Your system administrator might need to correct the situation.

3. Click the Add button.

   The Biographical Details page appears with an ID value of *NEW.*
4. Enter at least the required data, which includes the individual’s first and last name and all of the data in the Biographical Historygroup box (effective date, marital status, and gender).
5. Click Save.

   If you click Save before you enter the required data, an error message appears, reminding you that required data is missing.

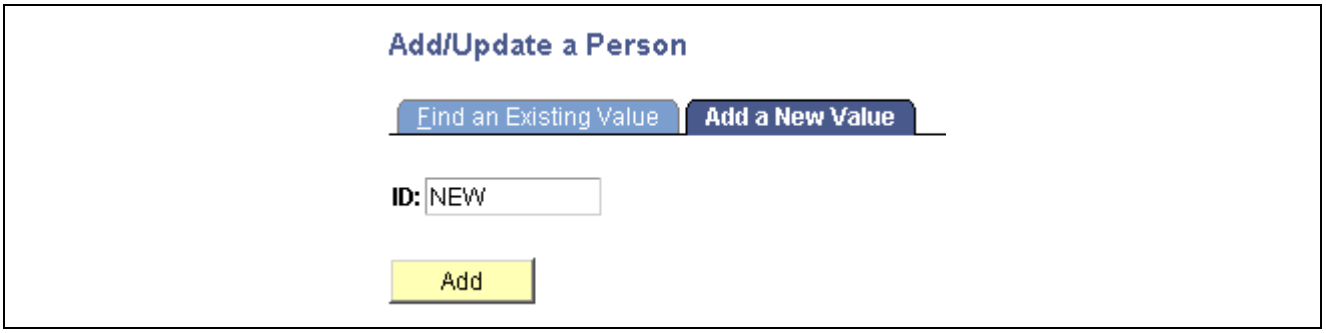
If all required data is entered, the system runs an automatic search based on the entered data and the specified search/match criteria. The search determines if a record for this individual already exists. If a record with this data does not already exist, the system assigns the next available unique ID to the record and adds it to your database.

If the system finds an existing record with the data, it displays the *Potential Duplicate Found* warning message.

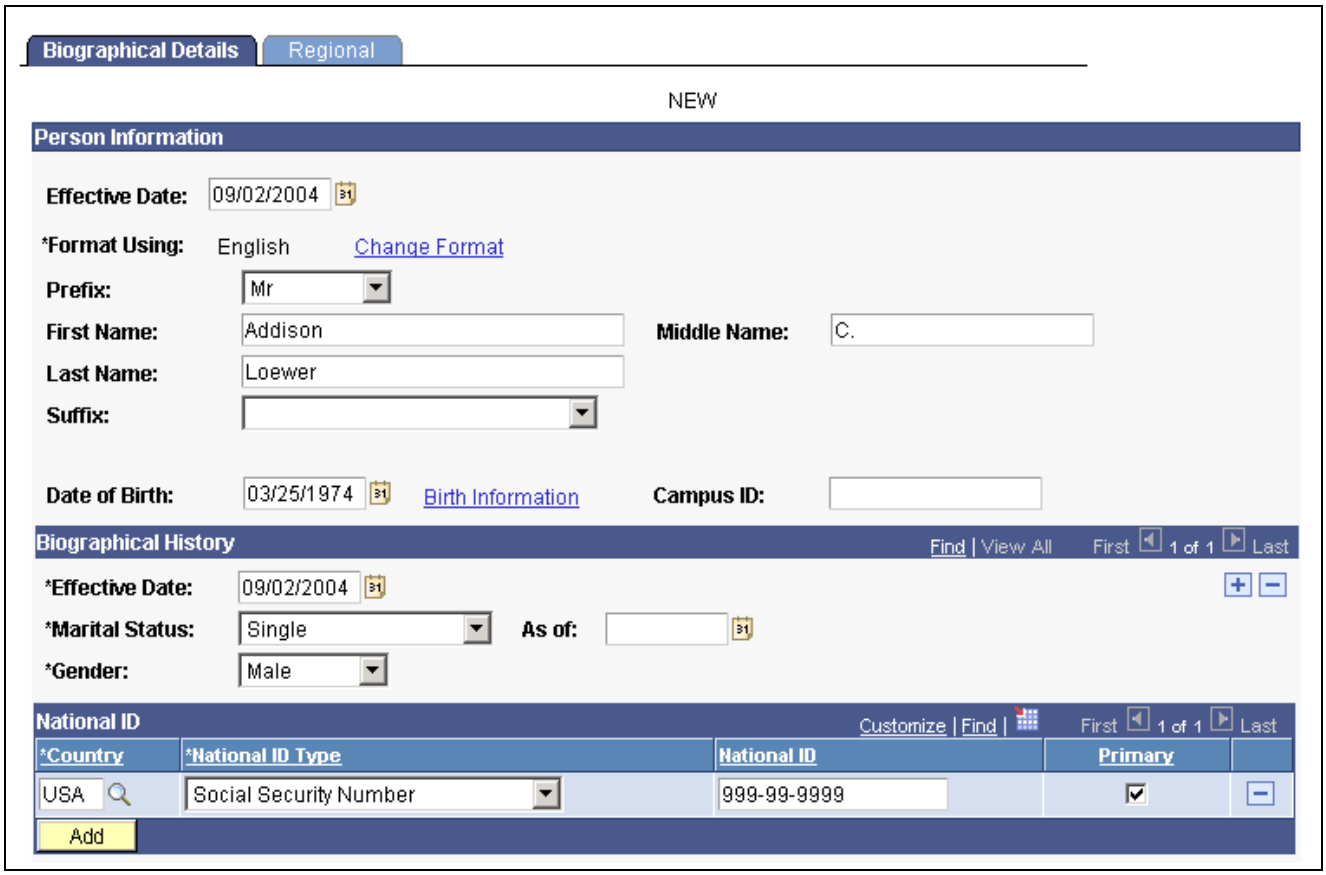
You can click OK to add the individual or click Cancel to investigate further.

Warning! If you click OK, the system adds the new person even though potential duplicates exist. If this is not what you want, click Cancel.

In most cases, you should identify the potential duplicate individuals first to determine if you should add the new one. Then click Cancel to exit the message and return to the Biographical Details page; from there, access the Search/Match page to run a search and identify the duplicate.

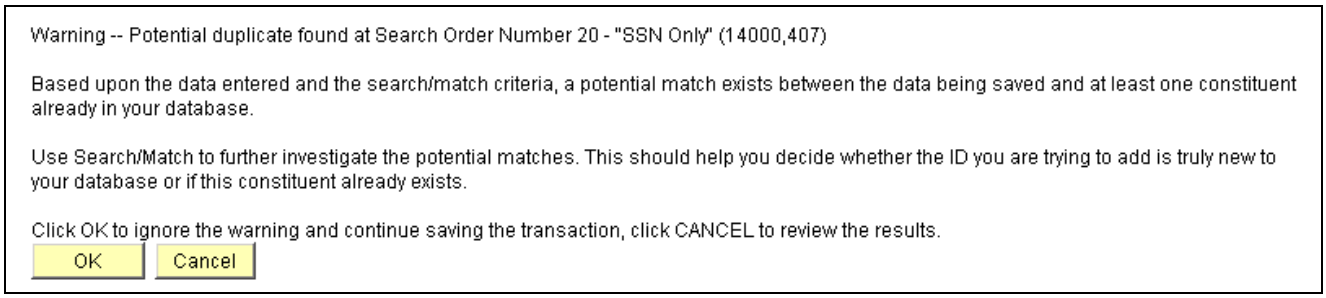


Example of the Add/Update a Person, Add a New Value page where you enter “NEW” to add a person.



Example of the top of the Biographical Details page where the system displays the ID of “NEW” when you add a person

If the system detects a record with duplicate information, such as another record with the same National ID number, a *Potential Duplicate Found* warning message appears, providing you the opportunity to continue adding the person or to cancel and investigate the duplicate further.



Example of a “Potential Duplicate Found” warning message that appears when the system detects duplicate data

Adding or Updating Biographical Details Data

To create a personal information record, you must enter biographical data about that individual on the Biographical Details page. To update biographical data, you can return to the Biographical Details page or you can access pages described in the *Managing Biographical Data*section to edit or update specific information. When you save information on either the Biographical Details page or the specific information pages, the system writes it to the relevant maintenance tables and updates that information both places.

This section lists prerequisites and discusses how to:

- Enter biographical details.
- Enter regional specific data.

See Also

Chapter 22, “Managing Biographical Information,” page 209

Prerequisites

Before entering or updating basic biographical data, you must design and set up names, addresses, and other foundational elements of Campus Community. You must also set up basic elements for personal data management.

See Also

Chapter 2, “Designing Campus Community,” page 5

Chapter 5, “Setting Up Biographical Information,” Setting Up Emergency Contacts Data, page 55

Pages Used to Add or Update Biographical Details Data

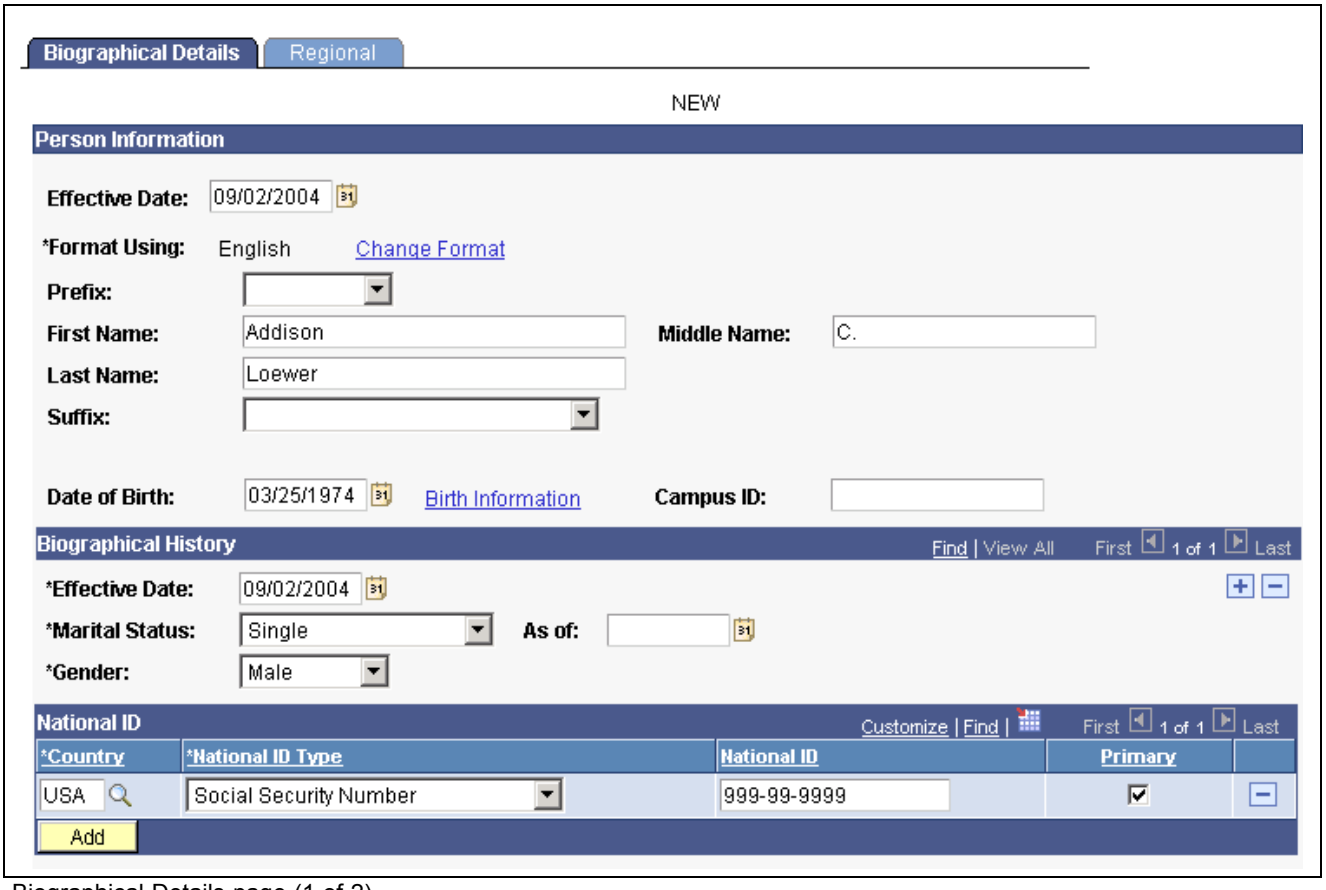
Page Name	Object Name	Navigation	Usage
Biographical Details	SCC_BIO_DEMO_PERS	Campus Community, Personal Information, Add/Update a Person, Biographical Details	Enter or update an individual’s name and other basic biographical data.
Birth Information	SA_BIRTH_DETAIL	Click the Birth Information link on the Biographical Details page.	Enter or review an individual’s birth location data.

Page Name	Object Name	Navigation	Usage
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Biographical Details page.	Edit an individual's address data. If you have enabled address validation on the Address Format page, the system validates the address that you enter when you click OK. The system validates the address by comparing it to the county, state, and city as defined on the Valid Address page. If your address does not contain a valid county, state, and city for the selected country you will receive an error. See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the Address Format for a Country. See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the County, State, and City for a Country.
Address Search	EO_ADDRESS_SRCH	Click the Address Search link on the Edit Address page.	Search for cities within the selected country. This link appears when you change the country by clicking the Change Address link. Enable address search on the Address Format page. See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the County, State, and City for a Country.
Visa/Permit Data	VISA_PERMIT_DETAIL	Click the Visa/Permit link on the Biographical Details page.	Enter or review an individual's visa and permit data, including country type, date of issue, duration, issuing authority, and other visa and permit information.

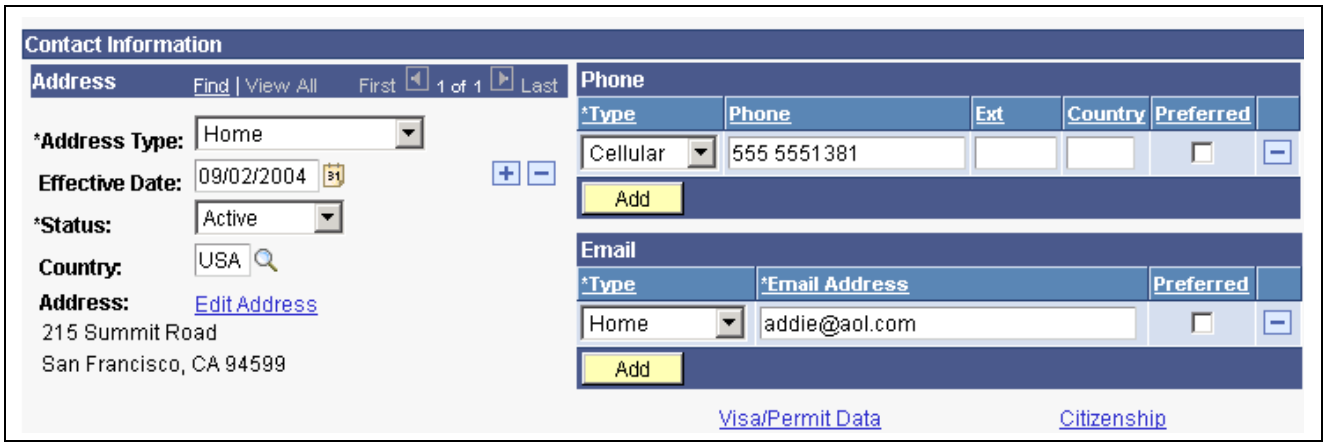
Page Name	Object Name	Navigation	Usage
Citizenship	SA_CITIZENSHIP_DTL	Click the Citizenship link on the Biographical Details page.	Enter or review an individual's citizenship and passport detail data, including country, citizenship status, passport number, issue date, expiration date, and other relevant information.
Regional	SCC_BIO_DEMO_REG	Campus Community, Personal Information, Add/Update a Person, Regional	Enter regional specific information for an individual.
Names (NLD)	SSR_NAMES_NLD	• Personal Information NLD, Student GBA Names NLD • Click GBA Reporting Names in the Netherlands section of the Regional page.	Enter an individual's name to report for GBA.

Entering Biographical Details

Access the Biographical Details page.



Biographical Details page (1 of 2)



Biographical Details page (2 of 2)

When you add a new person and are using system-generated IDs, the field at the top of the page displays the value *NEW* until you save the record. When you access the record after having saved it, the field displays the ID that the system assigned to this individual.

Person Information

Date of Birth Enter the individual's date of birth.

Birth Information Click this link to access the Birth Information Detail page, on which you can enter or edit the individual's birth location, country, and state.

Campus ID Enter the campus ID with which this person is most closely associated.

Biographical History

Effective Date(Required) Enter the date when the marital status and gender should be effective in your system.

Note. If you are changing the individual's marital status, you *must* enter an effective date.

Note. If you change the individual's name prefix, first, middle, or last name, suffix, or marital status, you *must* enter an effective date.

Marital Status (Required) and **As of** Specify the individual's marital status (such as single, married, or divorced) and the date (if known) on which the associated marriage or divorce took place.

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

Gender (Required) Enter the gender of this individual. Gender is used for reciprocal relationships (mother and daughter, mother and son, brother and sister, and so on). Values are:

Male

Female

Unknown

National ID

Country Enter or confirm the country of this individual's national ID.

If the individual has more than one national ID, you can add them here.

National ID Type (national ID type) The system enters the value that you establish for this country on the National ID Type Table page. You can override this default value.

National ID Enter the individual's national ID number.

Enter the number (with or without spaces and dashes). When you exit the field, the system formats the number based on the country and NID type selected.

Primary Select this check box to indicate the primary national ID number to use for this individual. You must indicate a primary national ID.

(CAN) Verifying Social Insurance Numbers for Canadian Employees

Invoke a modulus 10-check digit formula to verify an individual's Social Insurance Number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

If you enter an SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

(NLD) Verifying Social Security IDs for Dutch Employees

The Dutch National ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates the entry for the employee's Social Security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

(USA) When the Social Security Number is Unknown

When the Social Security number is missing, the system enters the default number that is defined on the National ID Type table, which is usually all nines (9s).

Contact Information

Address Type Select the type of address to enter, view, or update. The system displays *Home* as the default address type and displays the data, if any, for that address type.

Edit Address Click this link to access the Edit Address page, on which you can enter or edit address data for the address type selected. When you click OK on the Edit Address page, the data that you entered appears on the Biographical Details page when you return to the page.

Phone Select a phone type and enter the individual's phone number for that type.

Email Select an email type and the individual's email address for that type.

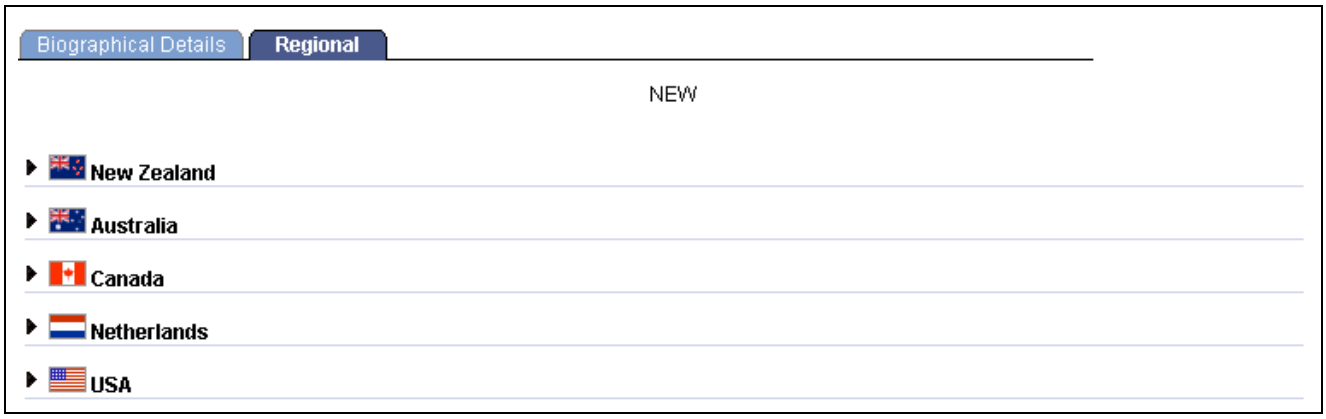
Visa/Permit Data Click this link to access the Visa/Permit Data page, on which you can enter or update the individual's visa and permit data.

Citizenship Click this link to access the Citizenship page, on which you can enter or update the individual's citizenship and passport data.

Entering Regional Specific Data

Access the Regional page and the area of the page that is specific to your region.

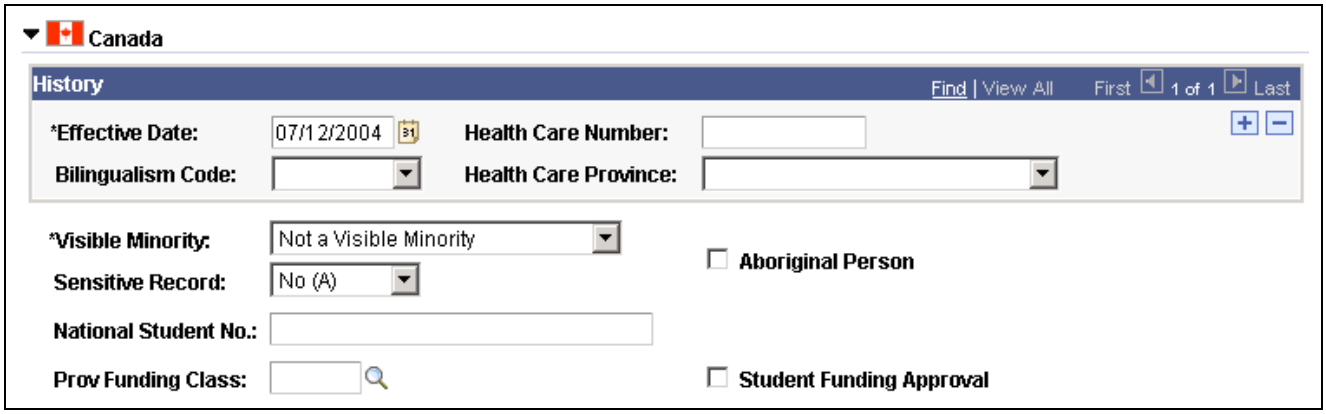
Note. As of the date of this publication, Canada, Netherlands, and USA functionality is available in PeopleSoft Enterprise Campus Solutions.



Regional page (with areas collapsed; 1 of 4)

(CAN) Canada

The following information is specific to users with an installed country of Canada.



Regional page (2 of 4), Canada

Bilingualism Code Enter the appropriate code for the person. If the Official Languages Act applies to the organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government.

Health Care Number and **Health Care Province** Enter a number and select the health care province.

Visible Minority Select a code to indicate whether the person's ethnic background is apparent based on physical appearance.

Aboriginal Person Select this check box to indicate that the person is a Canadian aboriginal person.

Sensitive Record Indicate whether the individual's record is sensitive, and for which the system should exclude from Statistics Canada's mail or telephone surveys.

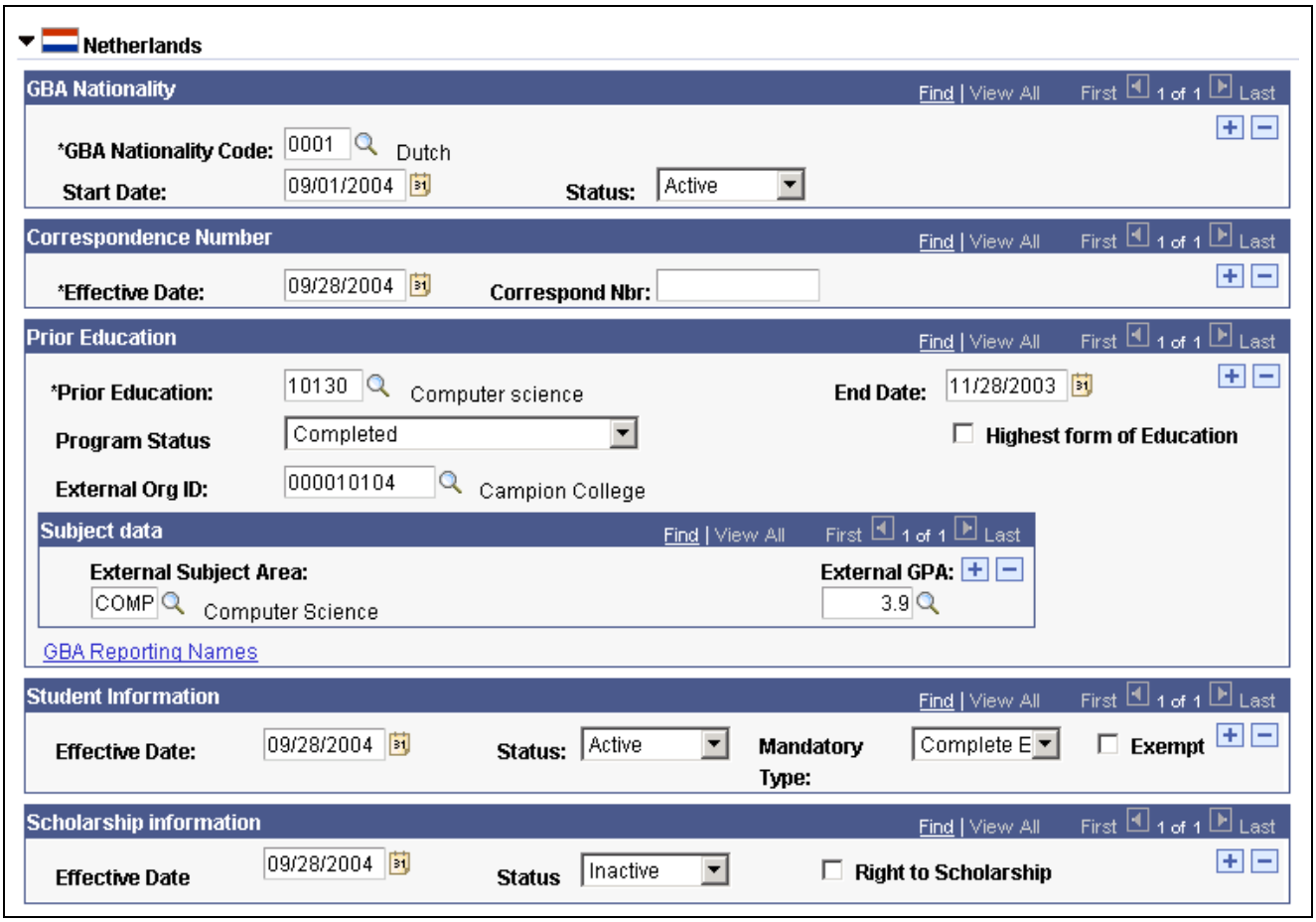
National Student No. (national student number) Enter the Canadian national student number for the student.

Prov Funding Class (provincial funding classification) Enter the funding classification by citizenship for grant purposes. This field prompts against the CAN_PROV_FUN record defined for the business unit.

Student Funding Approval Select this check box to indicate that the student is approved for funding.

(NLD) Netherlands

The following information is specific to users with an installed country of the Netherlands.



Regional page (3 of 4), Netherlands

Dutch schools receive funding from the Dutch Government for each student who complies with a predefined set of rules. To qualify for these funding schemes, schools must adhere to strict rules about the way that students are allowed to enter the admissions and registration process and about what information is registered and in what way. The Dutch Government requests that specific information about a student's prior curriculum and test results, language skills, and personal data are stored in the student administration application that is used.

GBA (Gemeentelijke Basis Administratie), the register of all Dutch citizen data, requires the registration of a student's nationality as kept by the different city councils.

GBA Nationality Code(Gemeentelijke Basis Administratie nationality code),**Start Date,** and **Status**	Enter the GBA nationality code, start date, and status. If a person's nationality changes, add a new row. Enter the new GBA nationality code and start date, with a status of *Active.*. The new nationality becomes active and the old nationality row is set to status of *Inactive.* This enables you to maintain GBA code history.
Correspond Nbr(correspondence number)	Enter the CBAP (Central Bureau for Admissions and Registration) correspondence number. The correspondence number is a crucial element in the data exchange with CBAP and CRI-HO (the current Register of enrollments in Higher Education). In specific cases a correspondence number of a student may change. Add a new row and enter the new number with a status of *Active.*To track the data exchanged, you must store both the old and the new numbers.
Prior Education	Enter data for all known prior education for the student. When all prior education is entered, the administrator can combine relevant schools (external organization IDs) and all subjects with relevant grade point averages.
Program Status	Enter the status of the prior education specified. Values are: *(Completed* *(Completed* *Running*
External Org ID(external organization ID)	Enter the ID of the education institution where the prior education took place.
End Date	Enter the date on which the prior education was completed.
Highest form of Education	Select this check box if this is the highest level of education attained by the student.
External Subject Area and **External GPA**(external grade point average)	Enter the specific course subject and corresponding grade.
GBA Reporting Names(Gemeentelijke Basis Administratie reporting names)	Click this link to access the Names page, on which you enter all of an individual's first names as delivered by CBAP (Central Bureau for Admissions and Registration) as well as all of the individual's initials and a longer last name.
Mandatory Type or **Exempt**	Enter a value to indicate the degree to which the type of education that your institution provides is, by Dutch law, mandatory for the student. Mandatory Type field values are: *Complete Exempt* *Fully Mandatory* *Not Mandatory* *Partial Exempt* *Partial Mandatory*

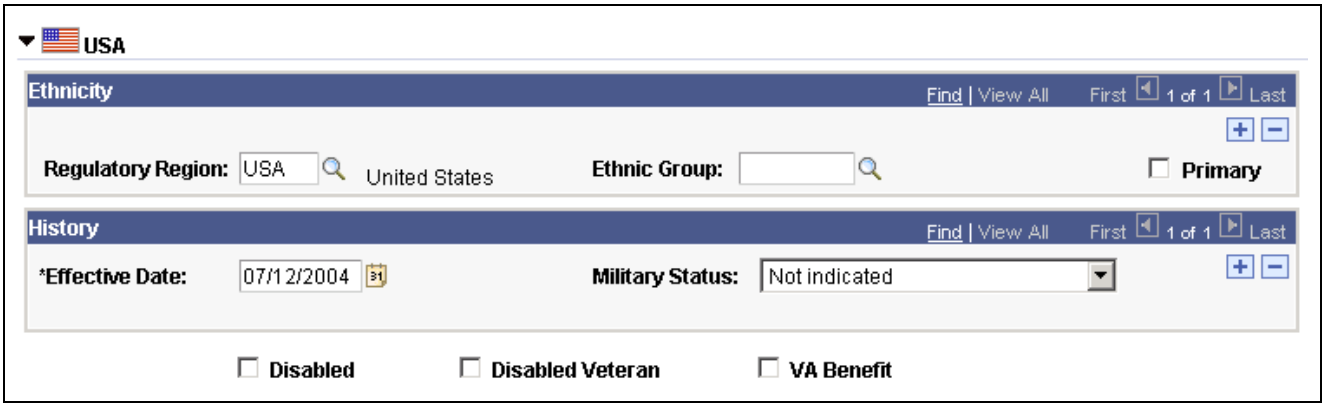
If no level of education is mandatory for the student, select the Exempt check box.

Right to Scholarship Select this check box if the student is eligible for a government scholarship.

Note. Mandatory Type and Right to Scholarship values are used for the registration of Base Register Education, *Basis Register Onderwijs* (or BRON) related data.

(USA) United States

The following information is specific to users with an installed country of *US* (United States of America).



Regional page (4 of 4), USA

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Reviewing Installation Setup and System Defaults," Selecting Country-Specific Information.

Ethnic Group and **Primary** Select the federally mandated group that includes the individual's ethnic designation; if this is the individual's primary ethnicity, select the Primary check box.

Military Status Select the value that describes this person's current military status.

Disabled Select this check box to indicate that the individual is disabled and might be covered by the Americans with Disabilities Act (ADA).

Disabled Veteran Select this check box to indicate that the individual is a veteran who was disabled in the line of duty and might be entitled to certain U.S. Veteran's benefits as well as being covered by the ADA.

VA Benefit(Veterans Administration benefit) Select this check box to indicate that the individual currently receives veteran benefits from your institution.

The U.S. Veterans Administration requires a hardcopy report of individuals who receive veterans benefits from your institution. When the VA Benefit check box is selected, the system includes this individual when that report is run.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Consolidating and Reporting Academic Statistics," Producing Veteran Reports.

CHAPTER 22

Managing Biographical Information

This chapter provides an overview of biographical information, lists prerequisites, and discusses how to:

- Manage names data.
- Manage addresses and phones data.
- Manage personal attributes information.
- Manage FERPA privacy controls.
- Manage relationships data.
- Enter emergency contact data.
- Track work experience.

Understanding Biographical Information

Personal information is personal data that distinguishes one individual from another. The most basic of this information is a person's biographical data, which includes name, address, gender, marital status, and date of birth.

When you manage many individuals in a database, you want to know and quickly access more than the basic information about them. With the personal information data pages, you can also enter and track an individual's various telephone numbers and addresses (street, email, and uniform resource locator [URL]), and you can maintain data about the individual's ethnicity, visa and permits, citizenship and passports, languages, relationships, religious preference, emergency contacts, and work experience.

You can enter and maintain different name types for an individual. With effective dating, you can also maintain and review the history of name changes for each type. For example, when the divorced Mrs. Edith Jones advises your institution that she has remarried and changed her last name to Bramowitz, you can maintain her preferred name, Edith Bramowitz; her former name, Edith Jones; and her maiden name, Edith Brown. Departments that need to know when these name changes occurred can determine that by reviewing the history of each name type.

You can also enter and maintain different address types for an individual. For example, you might want to enter an individual's home, business, mailing, and permanent address. You can update these addresses as needed and maintain the address change history. In addition to traditional addresses, many individuals have at least one email or web address and several telephone numbers. You can enter and review electronic addresses and phone numbers in your system. After you enter addresses data, you can run processes to apply or remove seasonal addresses, update linked addresses, and search for a specific address for an individual.

Use the pages described in this chapter to report personal attributes, including the ethnicity of students, staff, and constituents in your campus community. The United States government requires that students must be placed in at least one of a limited number of ethnic groups.

You can identify the reciprocal individual relationships that your institution wants to track. Reciprocal relationships include spouses, mother and daughter or mother and son, brother and brother or brother and sister, employer and employee, and so on.

You can use reciprocal relationships to associate an individual in your database with another individual inside or outside of your database. When you associate two individuals, you can set up joint communications for them and maintain one joint address to which to send the joint communication. For example, you can set up a joint communication addressed to Mr. and Mrs. Smith.

You can set the system to automatically verify the marital status that you enter on the Biographical Details Data page against the relationship that you select on the Relationships page. To set automatic marital status verification, select the marital status and associated relationship on the Relationship/Marital Status page that you want the system to verify. If the verification determines that the marital status of either individual is not the specified status for that relationship, a warning message appears, suggesting that you update the marital status on the Biographical Details page. For example, if you set the marital status of *Married* and the relationship of *Spouse*on the Relationships/Marital Status page, when you select the relationship of *Spouse* on the Relationships page, the system verifies that the marital status of each individual on the Biographical Details page is *Married.* If the marital status of either individual is different from *Married,* the system displays the warning message.

Note. Some default values for relationships are set on the Installation Defaults -- Campus Community page including reciprocal relationships. When the Create Reciprocal Relationship check box is selected on the Installation Default - CC page, the system automatically updates the relationship record for both IDs when you enter and save information on pages in the Relationship component.

You can track which languages an individual can read, speak, or write and to what degree of proficiency. You can also identify the religious preference, if any, reported by an individual and track the religious preferences of your overall campus community.

You can enter the names, addresses, and telephone numbers of people to contact when an individual has an emergency situation. You can enter as many contacts and as many phone numbers for each contact as the individual provides or as your institution requires.

You can use U.S. Standard Industry Classification (SIC) and Standard Occupational Classification (SOC) codes to identify and track data about an individual's work experience, including the name of the individual's former employer, employment begin and end dates, and the most current rate of pay.

You can enter or update most basic biographical data about an individual on the Biographical Details page, on which you create a personal record, or you can access pages described in this section to edit or update specific information. When you save information on the pages described here, the system writes it to the relevant maintenance tables, and updates the same information on other pages where it appears, including the Biographical Details page. Detailed information about using the Biographical Details page to add or update a person is provided in the *Adding a Person in PeopleSoft Enterprise Campus Solutions* section of this PeopleBook.

When you license PeopleSoft Enterprise Campus Self Service, you can also present basic biographical information to students and faculty so that they can view and update their own information, which minimizes the need for your staff to enter and maintain the data.

See Also

Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," page 195

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Self-Service Campus Personal Information"

Prerequisites

Before entering or updating basic biographical data, you must design and set up names, addresses, and other foundational elements of Campus Community. You must also set up basic elements for personal data management.

See Also

Chapter 2, "Designing Campus Community," page 5

Chapter 5, "Setting Up Biographical Information," Setting Up Emergency Contacts Data, page 55

Managing Names Data

This section discusses how to:

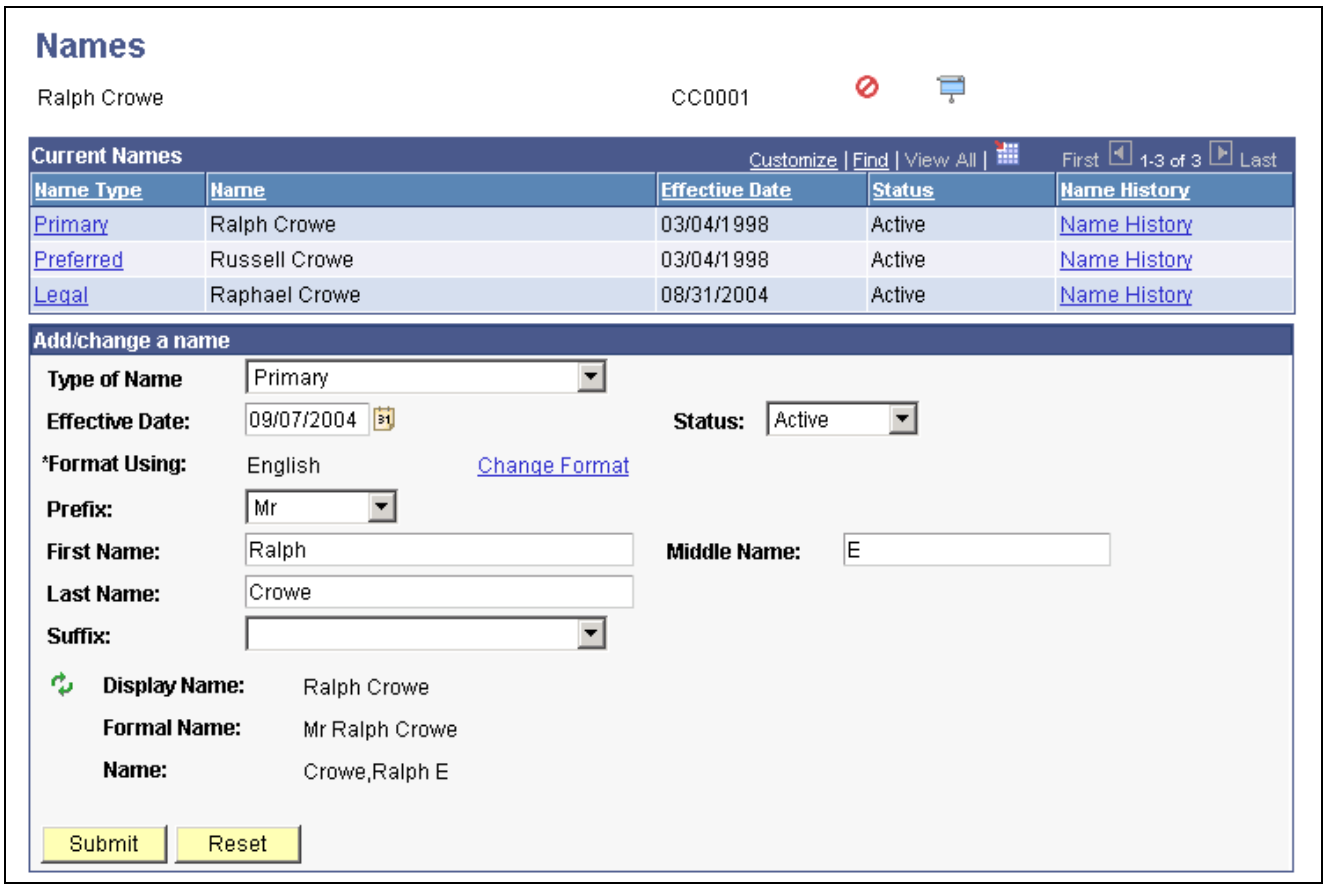
- Enter name types for an individual.
- View name history.

Pages Used to Manage Names Data

Page Name	Object Name	Navigation	Usage
Names	SCC_NAMES_89	• Campus Community, Personal Information, Biographical, Names • Campus Community, Personal Information (Student), Biographical (Student), Names • Student Recruiting, Student Recruiters, Personal Information, Names • Student Admissions, Application Entry, Personal Information, Names • Student Recruiting, Maintain Prospects, Personal Information, Names	View or create name types and data for an individual
Name Type History	SCC_NAME_HIST_SEC	Click the Name History link for a name type on an individual's Names page.	View the history of an individual's name type and update or add a new effective date for that name type.

Entering Name Types for an Individual

Access the Names page.



Names page

Warning! You must click Submit to submit data that you enter on the Names page*before* you save the page. Saving the page without first submitting the data will clear the fields for which you entered values and data will be lost.

Current Names

Name Type Displays the individual's current name types as links.

Click the link to view or update data for an existing name type. The system displays the associated data in the relevant fields.

The system displays the name format with the name fields previously entered for this name type and the Display Name, Formal Name, and Name fields at the bottom of the page, where you can add a new past or future effective-dated row for the name type.

Name Displays the individual's name as it appears in the default display name format for the selected name type.

Name History Click to access the Name Type History page, on which you can view the history of the name type.

To update the current name type for the individual, click the Name History link, add a new name row, specify the effective date and name format, and edit the related name fields.

Add/change a name

Use this area of the page to add or edit name information for the Name Type link that you selected at the top of the page.

Type of Name Select the type of name, such as *Primary, Preferred, Legal,* or *Maiden,* to add or update for this individual.

Values for this field are set up on the Name Type Table page.

Format Using Displays the name format currently used for this name type.

Change Format Click to select a different name format to use.

Enterable fields appear based on the format that you select. For example, for the English name format, the prefix, first name, middle name, last name, and suffix fields appear.

See Chapter 2, "Designing Campus Community," Defining Name Usages, page 20.

Display Name, Formal Name, and **Name** Displays the name formats to use throughout the system.

Display Name is the format to use in the heading of person pages.

Formal Name contains the individual's first name and last name with prefix.

Name displays the name as LastName, Suffix, comma, First Name, Middle Name.

(Refresh) Click to update the display name formats to reflect any changes made in any of the name fields.

Submit Click to submit data *before* saving the page.

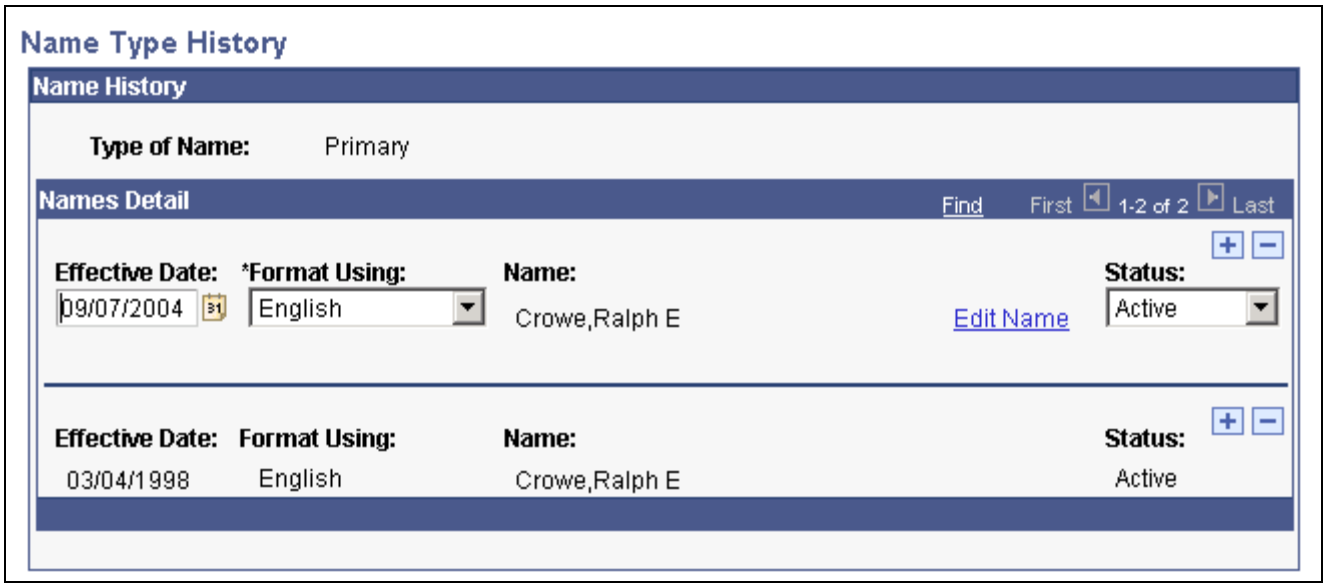
Submitting the data changes the data in the Current Names area so that you can view the changes, and clears all fields in the Add/change a name area.

To save the changes to the database, you must click Save.

Reset Click to clear all fields in the Add/change a Name area, which enables you to re-enter field values.

Viewing Name History

Access the Name Type History page.



Name Type History page

The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select.

Managing Addresses and Phone Data

This section provides an overview of managing addresses, lists prerequisites, and discusses how to:

- Enter addresses for an individual.
- Link addresses.
- Enter electronic address data.
- Enter seasonal addresses.
- Process seasonal addresses.
- Update linked addresses.
- Search for addresses.
- Enter phone data.

Understanding Address Management

Some of your faculty or constituents might routinely relocate and work from a different address. For example, a student might go to his family's ski lodge every winter break or a staff member might volunteer out of state each summer. Using the Seasonal Addresses feature, you can track temporary addresses to stay in contact with individuals while they are away. You enter the individual's seasonal address data with the appropriate begin and end dates. Then you run the seasonal addresses process to apply or remove the address, based on the begin and end dates. You can run the process to apply the seasonal address for a specific individual or you can run it to apply or remove all seasonal addresses between certain start and end dates.

When you update an address for a campus location or organization, the campus location or organization address for individuals linked to that location or organization are not changed in your database until you run the Update Linked Addresses process. When you run the process, the system locates all the individuals with whom that campus location or organization is linked and updates the changed address there as well. For example, when you change an organization's address and run the Update Linked Addresses process, the system locates each of the individuals who are linked to that organization and changes the organization's address.

You can search for addresses for individuals. You can search on address usage, email type, or address type. For example, if you want to send an email message to an individual at his dorm, you can search on the email type of *Dormitory.* If you need to send a billing notice, you can search on the address type of *Billing* or search on the address usage of *Billing.* However, if no address type of *Billing* exists for the individual, you will get no results. If your institution has assigned address usages, use one of the address usage search orders (in this case, Billing, Mailing, Home, Permanent) to have the system search for and find the first appropriate address.

Note. The system searches only on active addresses.

You can view a list of all addresses in your system for an individual, which includes all address types that have been entered for the individual. It also includes the individual's current addresses, any previous addresses that are now inactive, and any addresses that are set to become active in the future.

Prerequisites

Before managing seasonal or linked addresses or before searching for addresses in your system, enter addresses and address types for the individual.

See Also

Chapter 22, "Managing Biographical Information," Entering Addresses for an Individual, page 217

Chapter 22, "Managing Biographical Information," Entering Electronic Address Data, page 222

Pages Used to Manage Addresses

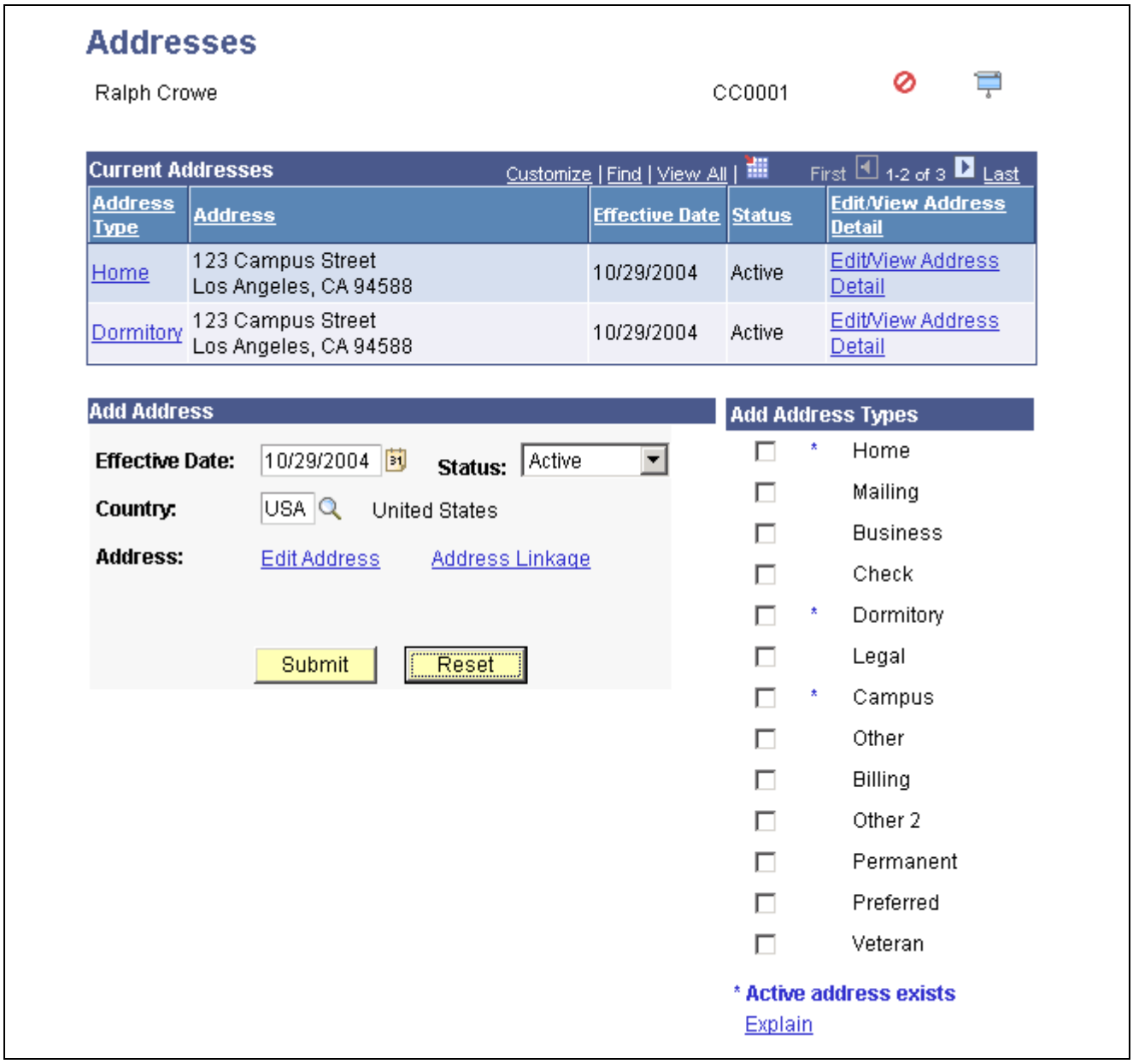
Page Name	Object Name	Navigation	Usage
Addresses	SCC_BIO_DEMO_ADDR	• Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Addresses	Enter or review an individual's address types and data.
Address History	SCC_ADDR_HIST_SEC	Click the Edit/View Address Detail link for an address type in the Current Addresses area of the Addresses page.	View the history of a specific address type for an individual.

Page Name	Object Name	Navigation	Usage
Edit Address	EO_ADDR_XXX_SEC (where XXX = the country code)	• Click the Edit Address link on the Addresses page or the Seasonal Addresses page. • Click the Update Addresses link on the Address History page.	If you access the Edit Address page by clicking Edit Address, enter address data for the specified address type. If you access the Edit Address page by clicking Update Addresses, edit or update any address data associated with the individual.
Electronic Addresses	E_ADDR_PERS	• Campus Community, Personal Information, Biographical, Addresses, Electronic Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Electronic Addresses • Student Recruiting, Student Recruiters, Personal Information, Electronic Addresses • Student Admissions, Application Entry, Personal Information, Electronic Addresses	Enter or review an individual's email address and URL data.
Seasonal Address	CC_ADDR_SEASONAL	Campus Community, Personal Information, Biographical, Addresses, Seasonal Address	Enter a seasonal address for an individual.
Process Seasonal Addresses	RUNCTL_SEASNL_ADDR	Campus Community, Personal Information, Biodemo Processes, Apply Seasonal Addresses	Run the process to apply or remove the designation of *Seasonal Address* to specified addresses in the Current Addresses area of the Addresses and Address History pages.
Address Linkage	SCC_ADDRSA_LNK_SEC	Click the Address Linkagelink in the Edit Address area of the Addresses page or the Address History page.	Link an address type to the location of a campus or an organization.
Update Linked Addresses	RUNCTL_CCADDLINK	Campus Community, Biodemo Processes, Update Linked Addresses	Run the process to update linked addresses throughout your system.

Page Name	Object Name	Navigation	Usage
Address Search	ADDRESS_SRCH	• Campus Community, Personal Information, Address Search • Contributor Relation, Constituent Information, People, Biographic Information, View Addresses	Search for a specific address for an individual.
Phone Numbers	PHONE_PERS	Campus Community, Personal Information, Biographical, Addresses, Phones	Enter or review an individual's telephone numbers.

Entering Addresses for an Individual

Access the Addresses page.



Addresses page

Information that you enter here is the same as the address data that you enter on the Biographical Details page when you create a personal record. When you save the data (either there or here), the system updates the address data in both places.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Adding or Updating Biographical Details Data, page 198.

Current Addresses

If the individual has current addresses in the database, this area of the page shows the current address types and the associated data. If the individual does not have a current address, the text *No current addresses exist* appears instead.

Address Type Displays the individual's current address types as links.

Click the link to view or update data for the address type. The system displays values for the current address in the relevant fields. Displaying the address data enables you to copy it from one address type to another.

Edit/View Address Detail Click to access the Address History page, on which you can view the history of the address type.

To update the current address type for the individual, click the Edit/View Address Detail link, add a new address row, specify the effective date and address format, and edit the related fields.

Add Address

Effective Date Enter the date on which the address is active.

Enter addresses in the chronological order of their effective dates. Enter the earliest dated address first and the future-most dated address last.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Reviewing Installation Setup and System Defaults".

Country Enter the country code for the address format to use for the individual. The system displays the fields required for that country as defined on the Country Table - Address Format page.

Edit Address Click to access the Edit Address page, on which you can enter new address data in the specified format.

Address Linkage Click to access the Address Linkage page, on which you can link an address type to a campus location or organization location.

Add Address Types

A particular address often applies to more than one address type for an individual. For example, an individual's dormitory, campus, and billing addresses might be the same.

To copy the address, effective date, and status from one address type to other address types, select the address types to which to assign the data, click Submit, and then click Save.

Address Type Click the current address type such as*Dormitory, Campus* or *Billing,* to copy. The system displays the associated address data beneath the Edit Address link in the Add Address area of the page.

To make changes to the data, click Edit address and make the changes.

* (blue asterisk to the left of an address type) Indicates that the address type exists and that it has a current or future-dated address with a status of *Active*. Be sure that you want to add a new effective-dated row to the existing data before selecting the address type.

Explain Click to display an explanation of the marks that indicate the successful or unsuccessful creation of an address type.

Note. A green check mark indicates the successful creation of an address type. A red X appears if you try to create an address type that causes effective dates to become out of sync for a specific address type. For example, a red X appears if the address type that you are adding already has an existing duplicate effective date, or when an earlier effective-dated address currently exists for the address type.

Submit To copy the address data to each of the selected address types, click Submit.

A green check mark appears next to each address type to which the data is successfully copied and the new or updated addresses appear in the Current Address area of the page. The addresses are not written to the Addresses Table until you click Save.

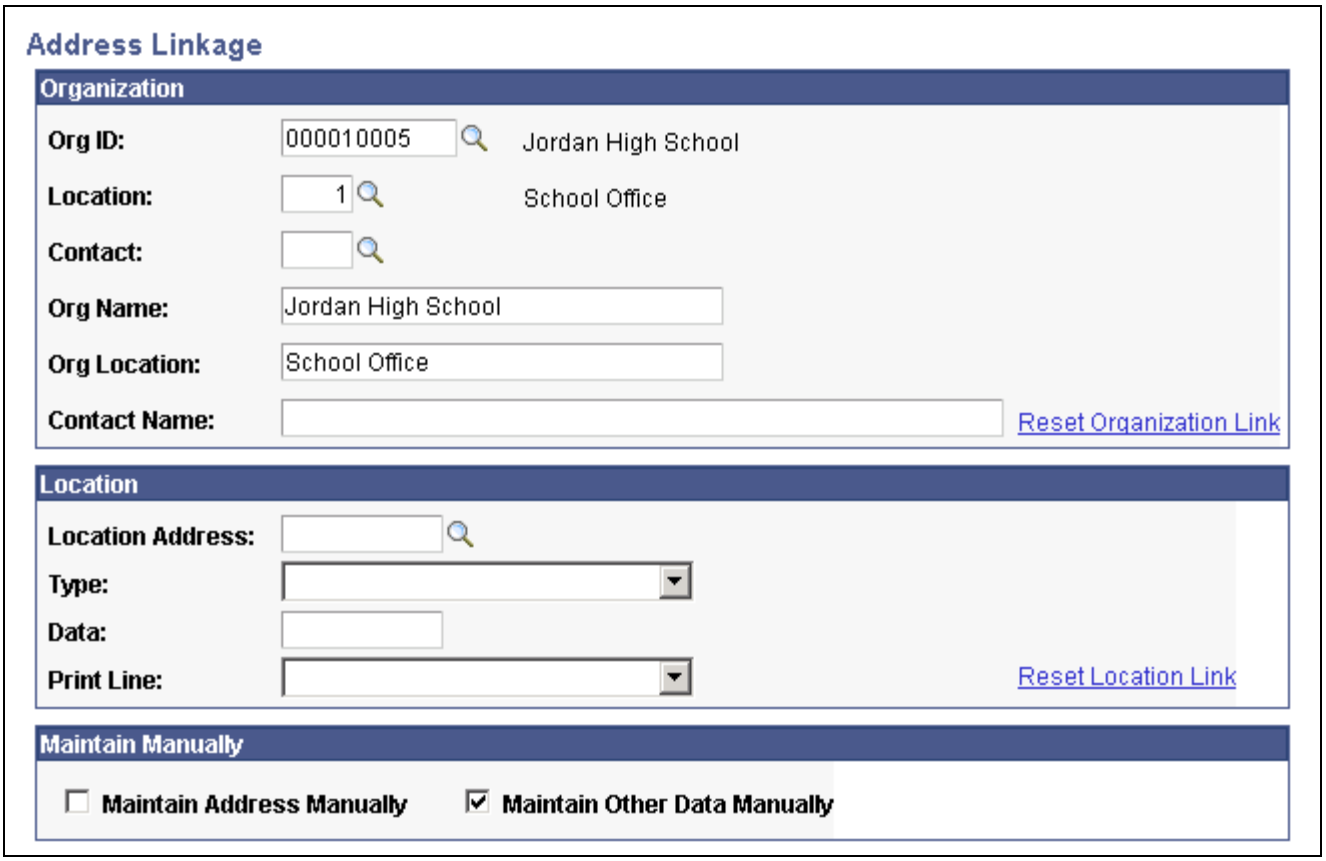
Note. When you create multiple address types from one source address, you can have a mixture of successful and unsuccessful outcomes (green check mark or red X respectively). The data only from successful outcomes appear in the Current Address area.

Edit/View Address Detail Click to access the Address History page, on which you can change the effective date and status for any newly submitted address and address type before you save it. You can also add a new effective-dated row for the selected address type.

Reset Click to clear address information in the Add Address and Add Address Type areas. Doing so enables you to enter different data, either manually or by clicking the Address Type link to copy address data from a current address.

Linking Addresses

Access the Address Linkage page.



Address Linkage page

This page enables you to specify the addresses to link. It also enables you to set linked data to manual maintenance so that the Update Linked Addresses process (or any other automatic update process) will bypass the information.

Organization

Enter information to identify the organization address to which you want to link.

Location

Enter information to identify the location address to which you want to link.

Location Address and**Type** Enter the location address and the specify the address type to which to link.

Data and **Print Line** Enter address data to print for this location and specify on which address line to print it.

Maintain Manually

Maintain Address Manually Select to maintain the address manually and have the system bypass it in the update linked addresses process or other automatic update processes.

Maintain Other Data Manually Select to maintain other data (from Location or Organization page areas) manually and have the system bypass it in the update linked addresses process or other automatic update processes.

Entering Electronic Address Data

Access the Electronic Addresses page.

Electronic Addresses page

Note. Information that you enter here is the same as the email address data that you enter from the Biographical Details page when you create a personal record. When you save data here, the system updates the same email address data on the Biographical Details page.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," page 195.

Email Information

Email Type Select the type, such as *Home, Business,* or *Mailing,* that describes this email address.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Email Address Enter the individual's email address.

Preferred Select to indicate the individual's preferred email address, which is the one to use first when contacting this individual. You may select only one preferred email address for an individual.

URL Information

Type Select the type, such as *Home, Business,*or *Mailing)* that describes this electronic address or URL.

URL Address Enter the individual's URL or home page address.

Entering Seasonal Addresses

Access the Seasonal Addresses page.

Seasonal Addresses page

Address Type Select the type of address that is seasonal for this individual. Only the address types for which the individual has data are available.

Start Date Indicate the date when the seasonal address begins to apply.

End Date Indicate the date when the seasonal address ceases to apply. When the end date occurs, the system automatically increases the start and end dates by one year and resets the address for the next year.

Country Enter the country formatting to use for this address.

When you exit the Country field, the address fields appear in the format for the selected country as defined on the country Address Format page.

Processing Seasonal Addresses

Access the Process Seasonal Addresses page.

Process Seasonal Addresses page

Select One ID Select this check box to apply or remove seasonal addresses for one individual only. You must specify the individual's ID in the ID field.

If you do not choose *Select One ID,* the system applies or removes seasonal addresses for all IDs for which seasonal address data exists.

Use Start Date Range Select this check box to indicate that all seasonal addresses beginning within the specified date range should be applied or removed.

Use End Date Range Select this check box to indicate that all seasonal addresses ending within the specified date range should be applied or removed.

Note. You must enter either a start date range, an end date range, or both. If the individual has multiple seasonal addresses, consider specifying a date range long enough to include all of them in the search.

If you specify only one date in a range, the system limits the search to seasonal addresses that begin or end, respectively, on that specific date.

Updating Linked Addresses

Access the Update Linked Addresses page.

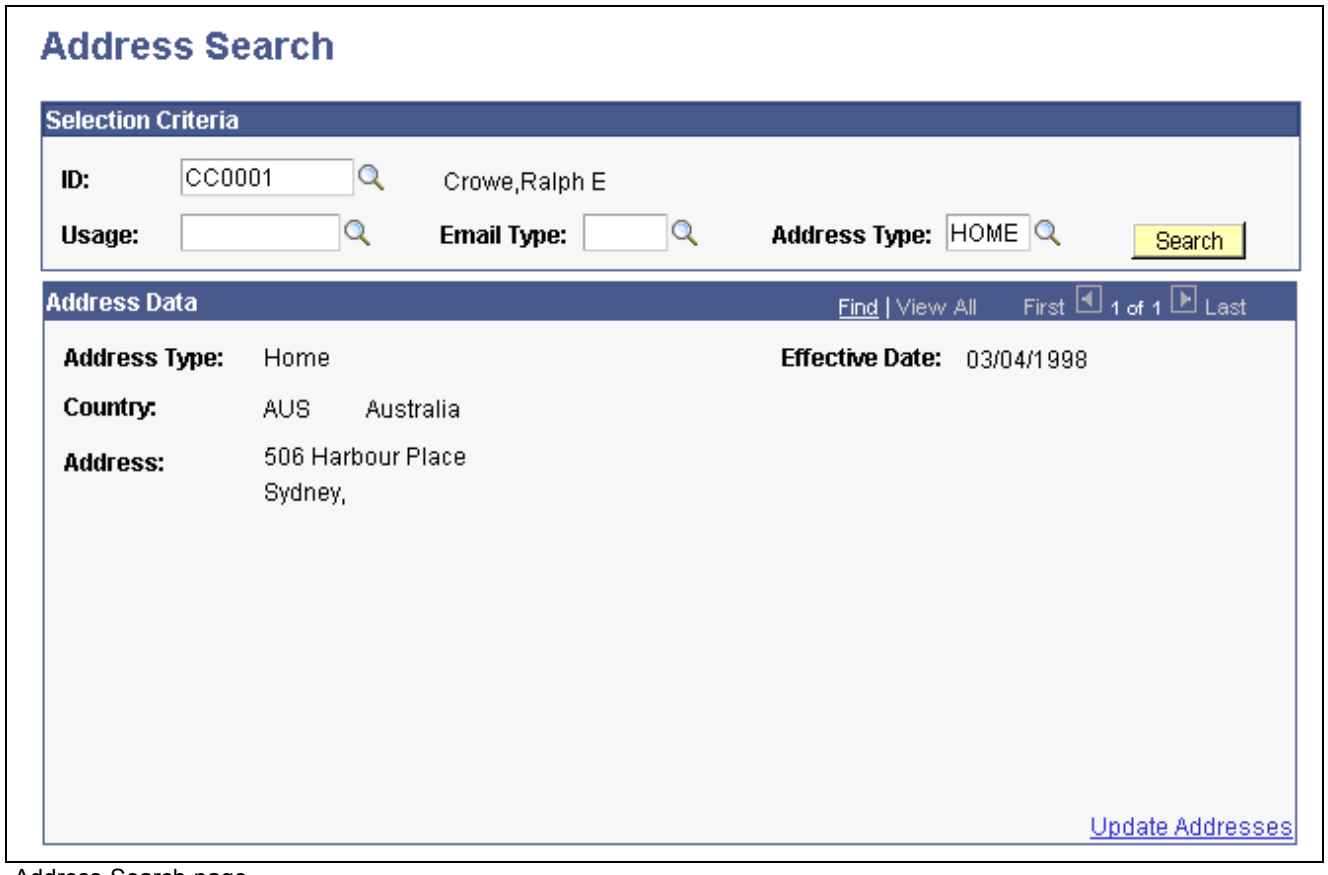
Update Linked Addresses page

Location Link Select this check box to indicate that the process should update all addresses linked to locations.

Organization Link Select this check box to indicate that the process should update all addresses linked to organizations.

Searching for Addresses

Access the Address Search page



Address Search page

Selection Criteria

ID Enter the ID of the individual whose address you want to find.

Usage Enter the type of address usage or search order for the system to use in the search.

All address usages on the Address Usage page are available.

Email Type Enter the type of email address, if any, for which the system should search, such as*Home, Dorm,*or *Business*.

Only the existing email types for this individual are available. If no email data exists for the individual, no email types are available.

Address Type Enter the type of street address for which the system should search, such as*Home, Dorm,*or *Business*.

All address types are available. If no data of that type exists for the individual, no results are returned.

Search Click to launch the search.

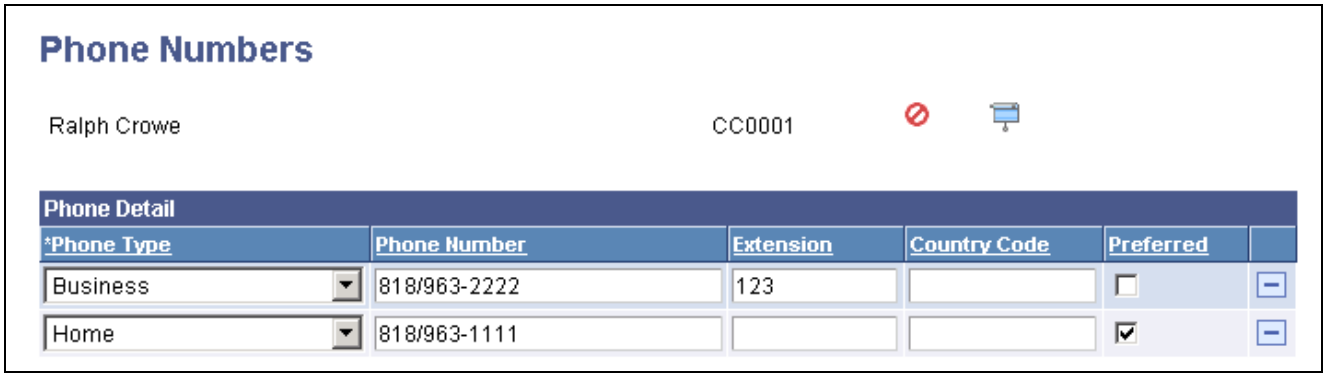
Address Data

The system displays the search results in this area.

Update Addresses Click this link to access the Addresses page on which you can edit or update any address data associated with the individual.

Entering Phone Data

Access the Phone Numbers page.



Phone Numbers page

Note. Information that you enter here is the same as the phone number data you enter on the Phone Detail page. When you save data here, the system updates the same phone number data on the Phone Detail page.

Phone Type Select the type, such as *Home, Business,* or *Mailing*) that describes this telephone number.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Phone Number Enter the telephone number, including area code, for this individual.

Extension	Enter the individual's direct extension, if any.
Country Code	Enter the country code, if required to complete the call.
Preferred	Select to indicate that this is the individual's preferred phone number, and the one to use first when contacting this individual. You can select only one preferred phone number for an individual.

Managing Personal Attributes Information

This section provides an overview of the personal attribute deceased label, lists prerequisites, and discusses how to:

- Enter ethnicity information.
- Enter languages information.
- Enter religious preference information.
- Enter decedent data.

Understanding the Personal Attribute Deceased Label

When an individual dies, you should apply the deceased label to all pages about that individual. Then, when users encounter a page with the word *DECEASED* at the top, they can determine whether to continue or suspend their transactions for that individual.

You can apply the label using either of the following methods. In both methods, when you save the individual's page, the system displays the word *DECEASED* at the top of the pages.

- To display the deceased label and not enter any other decedent data (for example, place of death and death certificate number), assign your institution's deceased service indicator to the decedent. The service indicator sets the deceased label to display. You can use this method regardless of whether you know the individual's date of death.
- If you know the individual's date of death, you can enter that date on the Decedent Data page along with other decedent data, and then save the page. You can use this method to apply the deceased label *only* if you know the date of death.

For example, you might receive confirmation that Gloria is deceased. You want to apply the deceased label to all pages about her as soon as possible to alert users. However, you have not received a copy of the death certificate or official confirmation of her date of death. Because you do not know when she died, you could assign her your institution's deceased service indicator, which is the one that is set to display the deceased label.

You can verify that the label is applied by accessing any page about the decedent. The word *DECEASED* appears at the top right of the page.

All of the decedent's data remains in your database until your system administrator deletes the decedent's ID.

See Also

Chapter 7, "Setting Up Service Indicators," page 89

Chapter 19, "Managing IDs," Deleting Individual IDs, page 172

Prerequisites

Before you can enter personal attributes data, you must define language codes, and religious preferences codes in your system. Before you can apply and manage FERPA privacy control, you must establish FERPA privacy control fields. Before you can allow students to identify publications for which they release FERPA privacy restrictions, you must set up your institution's publications.

See Also

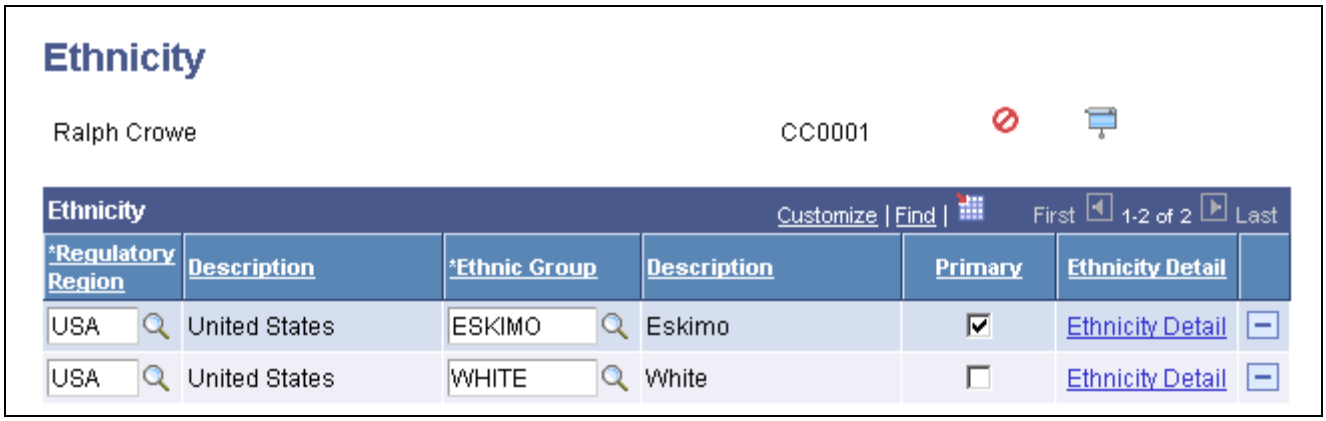
Chapter 5, "Setting Up Biographical Information," Setting Up Personal Attributes, page 49

Pages Used to Manage Personal Attributes Information

Page Name	Object Name	Navigation	Usage
Ethnicity	ETHNICITY_DETAIL	Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity	Enter or review an individual's ethnicity data.
Ethnicity Detail	ETHNICITY_SEC	Click the Ethnicity Detail link for an ethnic group on the Ethnicity page.	Enter or review an individual's ethnicity detail, including percentages and whether it is the individual's primary ethnicity.
Languages	SCC_LANGUAGES	• Campus Community, Personal Information, Biographical, Personal Attributes, Languages • Student Recruiting, Student Recruiters, Personal Information, Languages • Student Recruiting, Maintain Prospects, Personal Information, Languages • Student Admissions, Application Entry, Personal Information, Languages	Enter and track an individual's language abilities.
Religious Preferences	RELIGIOUS_PREF	• Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences • Contributor Relations, Constituent Information, People, Personal Attributes, Religious Preference	Enter data to identify an individual's religious preference.
Decedent Data	SA_DECEASED_DATA	• Campus Community, Personal Information, Biographical, Personal Attributes, Decedent Data • Contributor Relations, Constituent Information, People, Personal Attributes, Decedent Data	Enter the date of death and other data about the decedent.

Entering Ethnicity Data

Access the Ethnicity page.



Ethnicity page

Ethnicity

Regulatory Region Enter your institution's regulatory region.

The regulatory region controls the set of ethnic group values available from the Ethnic Group field.

Note. Currently PeopleSoft delivers ethnic group values for Regulatory Region = *USA* only.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining Ethnic Groups.

Ethnic Group Select the ethnicity claimed by this individual. Values for the specified regulatory region are available from the Ethnic Groups page.

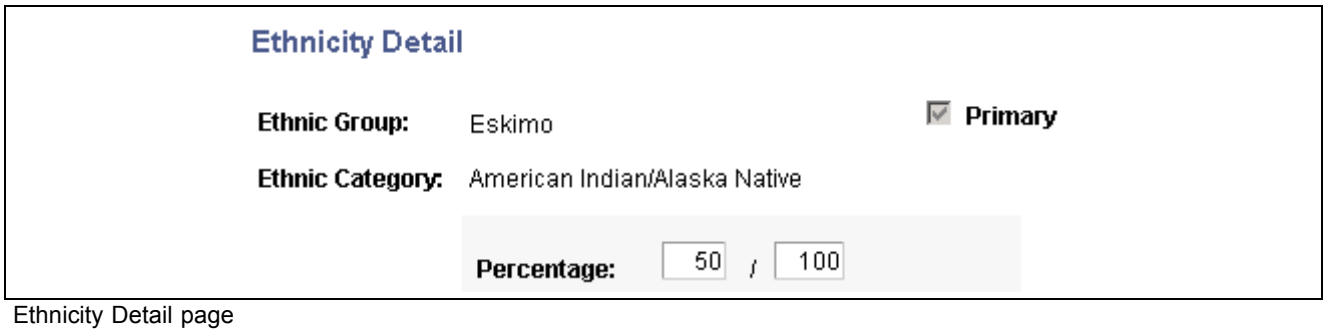
See Chapter 5, "Setting Up Biographical Information," Defining Ethnic Groups, page 50.

Primary Select to indicate that this is the primary ethnicity that the individual claims.

Ethnicity Detail Click to access the Ethnicity Detail page, on which you can specify or view the percentages of each ethnic group.

Entering Ethnicity Percentages

Access the Ethnicity Detail page.



Ethnicity Detail page

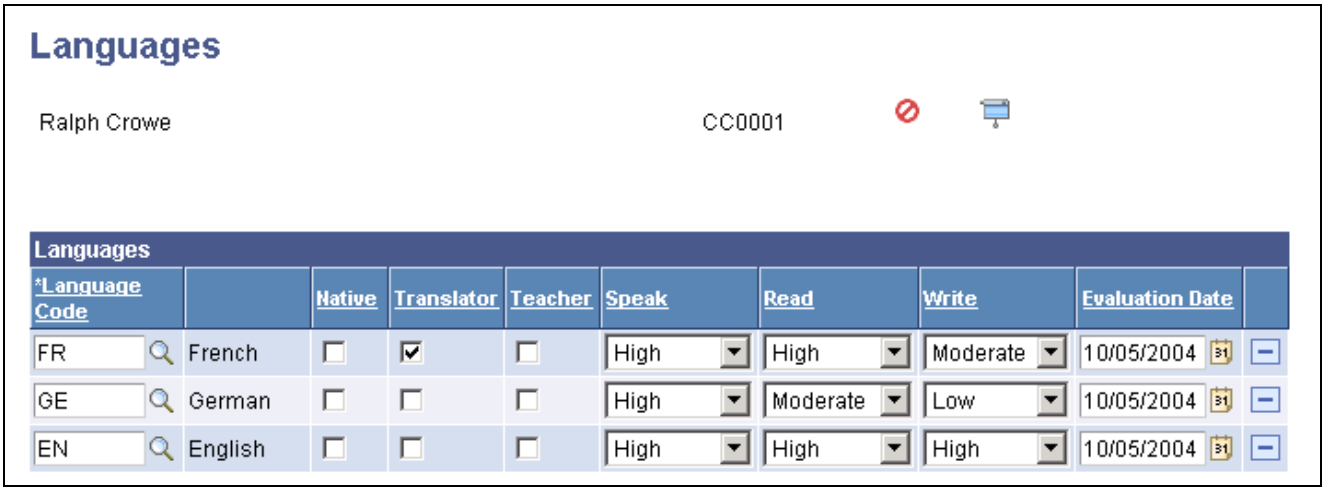
Percentage Enter the proportion of ethnicity, expressed in a valid numerator and denominator ratio not exceeding a total of one. For example, if the individual claims to be half Eskimo you could enter 1/2 or 50/100. However, if she says she is 110% Eskimo, the most you can enter is the equivalent of one or 100% (100/100). The total for each ethnicity cannot be more than one.

However, the system does not place restrictions on the sum of all of the ratios together. For example, if you enter more than one ethnic group for the individual on the Ethnicity page, you can enter different percentages here on the detail page for each ethnic group. You could enter 50/100 Eskimo, 50/100 Cherokee, and 50/100 South American, for a total of 150/100.

Note. No linkage exists between the ethnic categories mandated by a regulatory region and the details that you enter here. The additional ethnicity data is for your institution's information only.

Entering Languages Data

Access the Languages page.



Languages page

Language Enter the language that this individual speaks, reads, or writes.

Native Select this check box to indicate that this is the individual's native or primary language.

Translator Select this check box to indicate that the individual can translate or interpret this language.

Teacher Select this check box to indicate that the individual can teach or has taught this language.

Speak Select the level of proficiency, such as high, medium, or low, with which the individual can speak this language.

Read Select the level of proficiency, such as high, medium, or low, with which the individual can read this language.

Write Select the level of proficiency, such as high, medium, or low, with which the individual can write this language.

Evaluation Date Enter the date on which the individual's levels of proficiency in this language were evaluated, reported, or entered.

See Also

Chapter 2, "Designing Campus Community," Setting Up Language Codes, page 16

Entering Religious Preferences

Access the Religious Preference page.

Religious Preference page

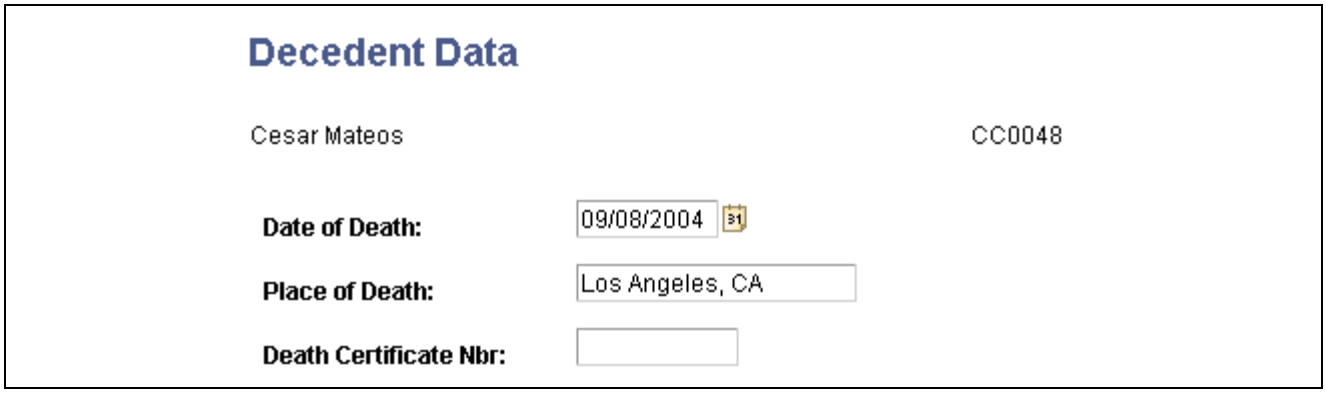
Religious Preference Select the individual's stated religious preference.

See Also

Chapter 5, "Setting Up Biographical Information," Defining Religious Preference Codes, page 51

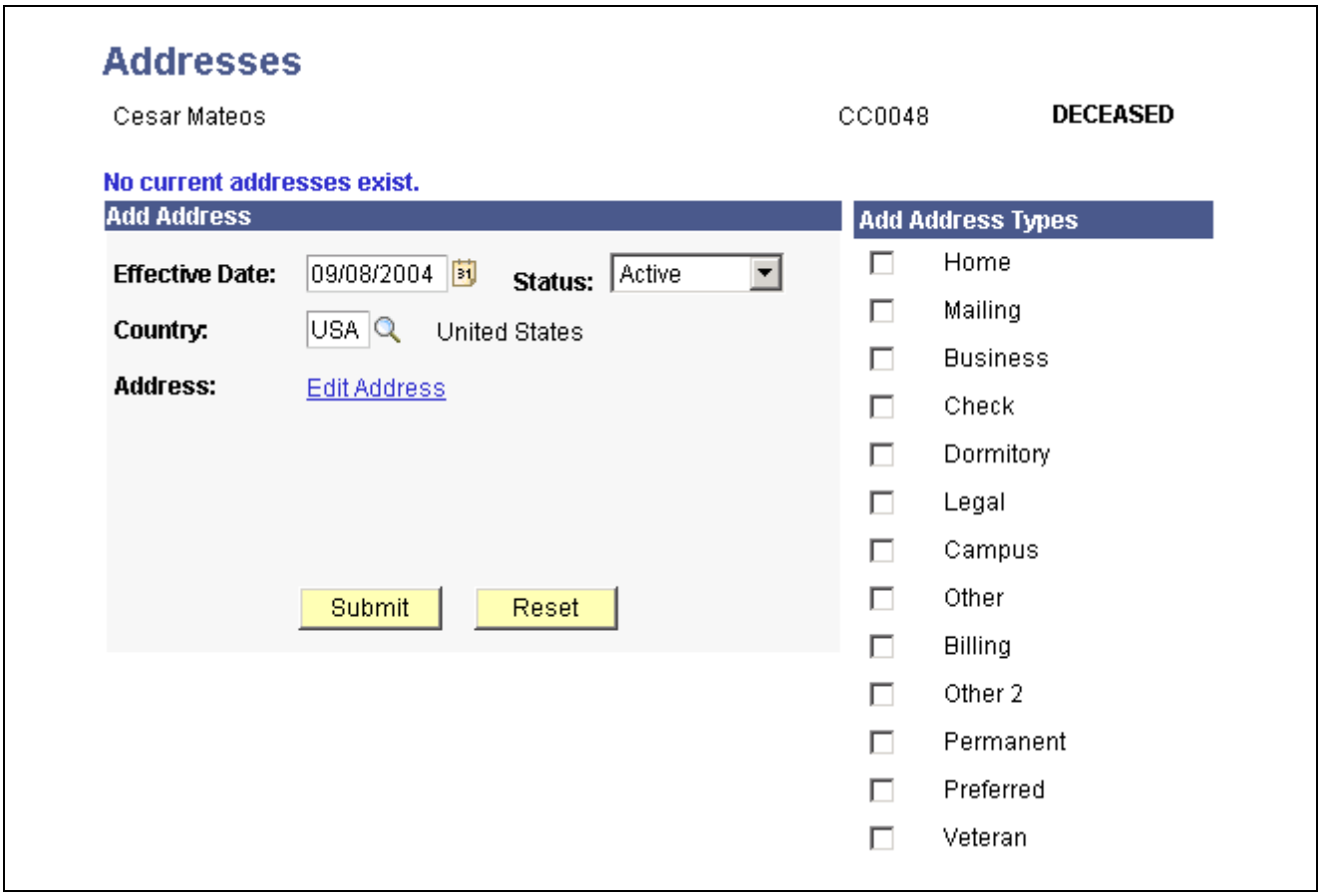
Entering Date of Death and Other Decedent Data

Access the Decedent Data page.



Decedent Data page

Note. Only the date of death is required to display the deceased label for the individual throughout your system.



Example of the Addresses page with the Deceased indicator displayed

Date of Death

Enter the individual's date of death. You can enter either the official date of death or the date on which your institution was notified of the death, depending on your institution's requirements.

When you enter a date and save the page, the system displays the word *DECEASED* at the top of pages about this individual throughout your system. If you do not enter a date, the deceased label does not appear.

Note. If you do not know the date of death, use the Service Indicator page to assign your institution's deceased indicator to this individual.

If, after you enter a date of death and save the Decedent Data page, you decide that you do not want the deceased label to appear on pages for this individual, return to the Decedent Data page, highlight and delete the date, and then save the page with an empty Date of Death field. The deceased label no longer appears.

Place of Death

Enter the place (city, state, county, or country) where the individual died.

Death Certificate Number

Enter the number from the official certificate of death.

The death certificate number might be required for financial aid reconciliation if the individual is a student, for beneficiary pay out if the individual is an employee, or to receive funds if the individual donated a trust to your institution. Consult your institution's administration.

Managing FERPA Privacy Controls

See Chapter 26, “Managing FERPA Privacy Control,” page 299.

Managing Relationships Data

This section lists prerequisites and discusses how to:

- Relate one individual to another.
- Identify an individual’s legacy relationship to the institution.
- Specify communications for the communication recipient relationship.
- Create joint communications relationships.
- Enter relationship addresses.
- Enter relationship detail data.
- View a list of relationships.
- Identify an individual’s relationship with the institution.

See Also

Chapter 31, “Managing Communications,” Understanding Joint Communications, page 435

Chapter 22, “Managing Biographical Information,” Identifying an Individual’s Relationship with the Institution, page 248

Prerequisites

Before you can enter relationship data, you must define the relationship types for which you want to collect information. To use full relationship functionality, you must also define legacy affiliations, create institutions and academic programs, and create letter codes to identify communications to send to related individuals and set up salutation types to use.

See Also

Chapter 5, “Setting Up Biographical Information,” Setting Up Individual Relationships, page 52

Chapter 5, “Setting Up Biographical Information,” Setting Up Relations to the Institution, page 54

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Designing Your Academic Structure”

Chapter 2, “Designing Campus Community,” Defining Salutation Types for Joint Communications, page 23

Chapter 2, “Designing Campus Community,” Reviewing or Defining Campus Community Installation Settings, page 6

Chapter 14, “Setting Up Communications,” Defining Standard Letter Codes, page 132

Pages Used to Enter Relationships Data

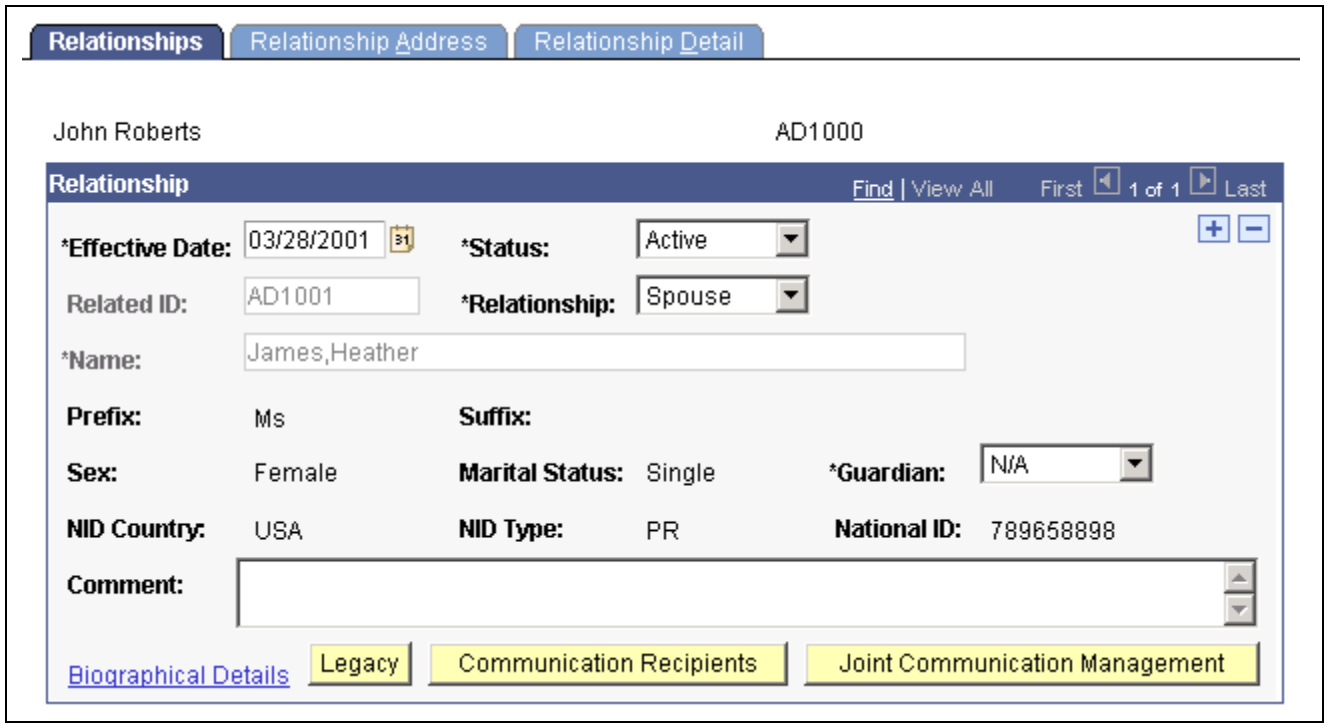
Page Name	Object Name	Navigation	Usage
Relationships	RELATIONSHIPS	• Campus Community, Personal Information, Biographical, Relationships, Relationships • Contributor Relations, Prospect Management, Relationships, Relationships • Contributor Relations, Constituent Information, People, Relationships, Relationships • Student Admissions, Application Entry, Relationships, Relationships • Student Recruiting, Maintain Prospects, Relationships, Relationships	Enter data to associate one individual with another individual inside or outside of your database.
Legacy Information	LEGACY_SEC	Click the Legacy button on the Relationships page.	Identify a related person's legacy relation with your institution.
Communication Recipient	REL_MLT_RECPNT_SEC	Click the Communication Recipients button on the Relationships page.	Specify the communications for which a copy should also be sent to the related person.
Joint Communication Management	RELATION_SALU_SEC	Click the Joint Communication Management button on the Relationships page.	Create joint communications between two related individuals and establish how their names should appear in the address and salutation. You can also use this page to dissolve joint communications for these individuals.

Page Name	Object Name	Navigation	Usage
Relationship Address	REL_ADDR_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Address • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationship, Relationships • Student Recruiting, Maintain Prospects, Relationships	Review addresses for the primary individual and for the related individual. If the related person does not have an ID in your system, the Edit Address link is available for you to enter an address for this person. If you use the communication recipient feature, this is also where you select the related individual's address to send a copy letter. Also, if you use the joint communication feature, this is where you select which address (either from the primary or from the related ID's addresses) to which you want to send the joint communications.
Relationship Detail	RELATIONSHIP_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Detail • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationships • Student Recruiting, Maintain Prospects, Relationships	Enter information about the related person that is of interest to your institution.
Person-to-Person Summary	RELATIONSHIP_SUMRY	Campus Community, Personal Information, Biographical, Relationships, Person to Person - Summary	View a list of relationships for an individual.

Page Name	Object Name	Navigation	Usage
Relations With Institution	PERS_INST_REL	• Campus Community, Personal Information, Biographical, Relationships, Relations With Institution • Student Admissions, Application Entry, Relationships, Relations With Institution • Student Recruiting, Maintain Prospects, Relationships, Relations With Institutions	Specify or review an individual's relations to your institution.

Relating One Individual to Another

Access the Relationships page.



Relationships page

Relationship

Related ID

If the related person is in your database, select the related person's ID. When you select the ID, the system displays the related person's biographical data, including the person's name, prefix, suffix, sex, marital status, and primary NID information.

If the related person is not in your database, the name and biographical data fields are available so that you can enter the related person's name and data.

Note. The Related ID field is available when you are creating the relationship between these individuals for the first time. After you create and save the relationship, when you return to the Relationships page, the system continues to display the related ID and biographical data, but you cannot edit or update it from here. If you need to edit or update the related person's biographical data, click the Biographical Details link at the bottom of the page. You then determine if you need to update information on the Biographical Details page or reconsider the relationship that you are creating.

Relationship Specify the related person's relationship, such as mother, neighbor, employer, or loan reference to this individual.

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

Note. If you set up marital status verification on the Relationship / Marital Status page, the system verifies the marital status on the Biographical Details page for each individual against the relationship that you select here. If the marital status of either individual is not the appropriate status for the specified relationship, the system displays a warning message suggesting that you update the marital status for the individuals on the Biographical Details page.

Guardian Select the legal guardianship that describes the status of the related person to the primary individual. Values are:

Guardian

N/A

Other

Parent

Self

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

Comment Enter comments to further identify or describe the related person or the relationship between the two individuals.

Biographical Details Click to access the Biographical Details page, on which you can view or update the related person's biographical data.

Legacy Click to access the Legacy Information page, on which you can identify the related person's legacy relation with your institution.

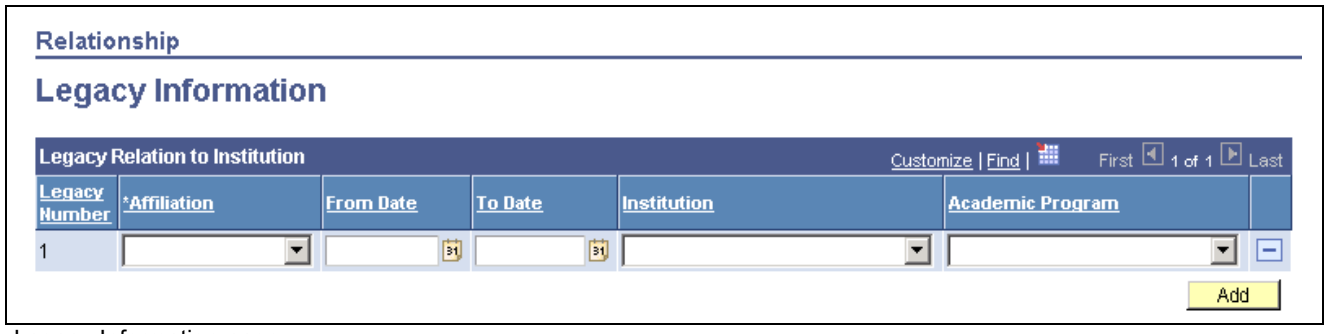
Communication Recipients Click to access the Communication Recipient page, on which you can specify the communications for which a copy should also be sent to the related person.

Joint Communication Management Click to access the Joint Communication Management page, on which you can create or dissolve joint communications for these two individuals.

Warning! Individuals can have several relationships in your database; however they can have joint communications with only one of those relationships. For example, you can create a relationship between Gloria Wilson and her husband, Mark Gonzalez, and you can create a relationship between Gloria Wilson and her mother, Maria Wilson. You can then create joint communications with either Gloria and her husband or Gloria and her mother, but you cannot create joint communications for both.

Identifying an Individual's Legacy Relation to the Institution

Access the Legacy Information page.

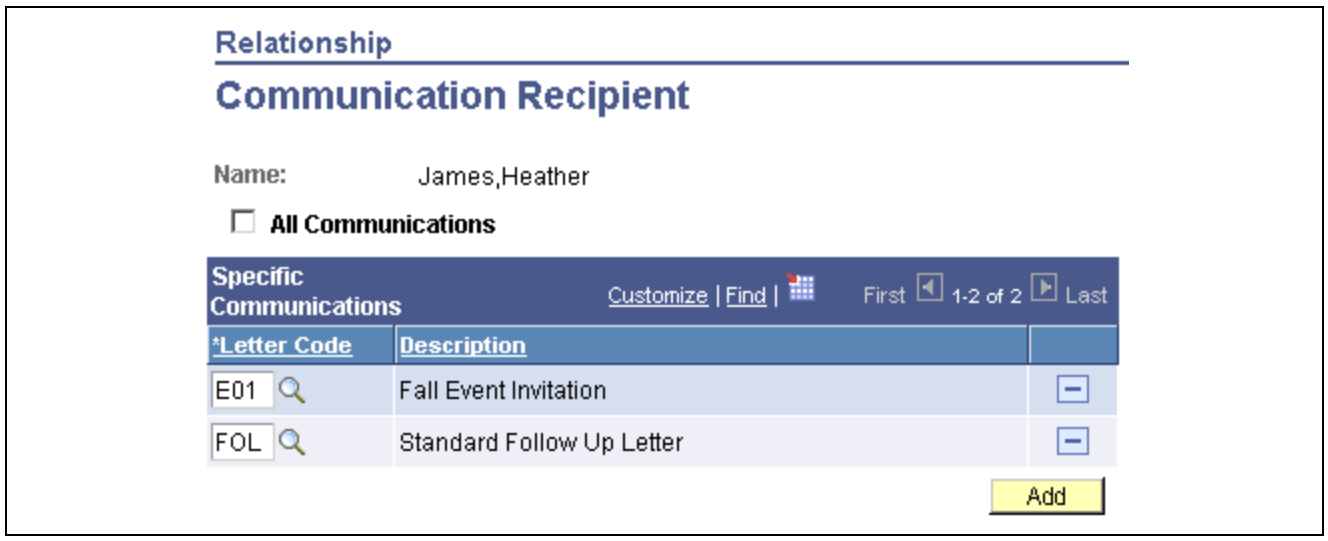


Legacy Information page

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Setting Up Constituent Data," Defining Person and Organization Relationships.

Specifying Communications for the Communication Recipient Relationship

Access the Communication Recipient page.



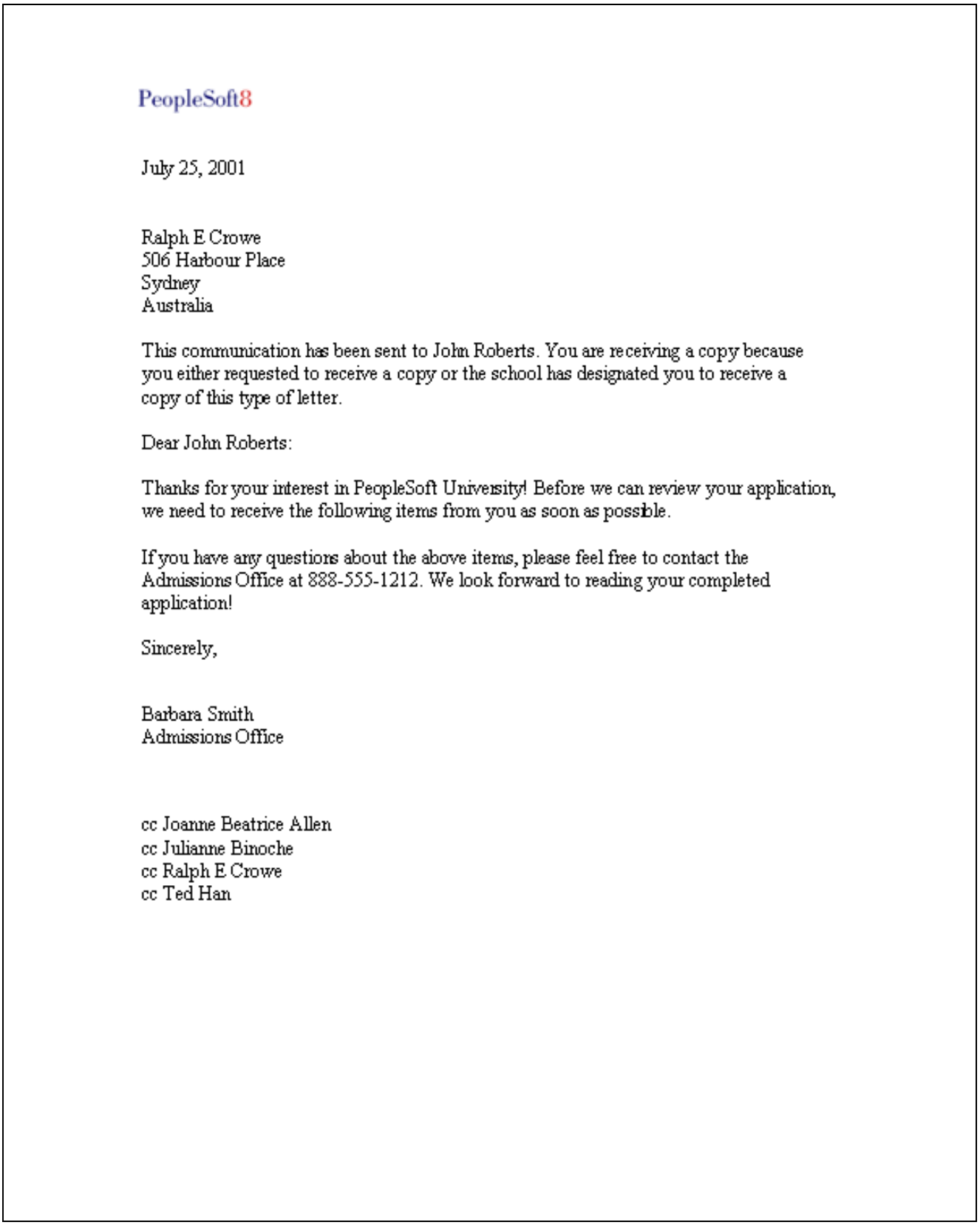
Communication Recipient page

You can create letter copies to send to an individual's related IDs. You can create copies of all communications generated for the primary ID or select specific communications to copy. To create the copy letter, you must set up a template with the related ID's name and address. When the letter generation data extract process encounters a letter code that is set to include a copy to the individual's related ID, it extracts the related person's address data from the Relationship Address page.

Note. For confidentiality purposes, the communication recipients that you set here will not receive copies of communications set to allow joint communications for a relationship, even when you select *All Communications.* This preserves information communicated to Mr. and Mrs. Smith, for example.

All Communications	Select to generate a copy for this related individual of all communications to the primary individual.
Letter Code	Enter the letter codes for the communication to copy. Available letter codes are from the Standard Letter Codes page.

Warning! When an individual has multiple relationships set up with communication recipients, the process extracts data for all of the related IDs. When merging the data into the template, the process lists a maximum of five recipients as receiving a copy. You can create and send copies to more than five recipients, but the letter can list only five, as shown in the following sample letter.



PeopleSoft8

July 25, 2001

Ralph E Crowe
506 Harbour Place
Sydney
Australia

This communication has been sent to John Roberts. You are receiving a copy because you either requested to receive a copy or the school has designated you to receive a copy of this type of letter.

Dear John Roberts:

Thanks for your interest in PeopleSoft University! Before we can review your application, we need to receive the following items from you as soon as possible.

If you have any questions about the above items, please feel free to contact the Admissions Office at 888-555-1212. We look forward to reading your completed application!

Sincerely,

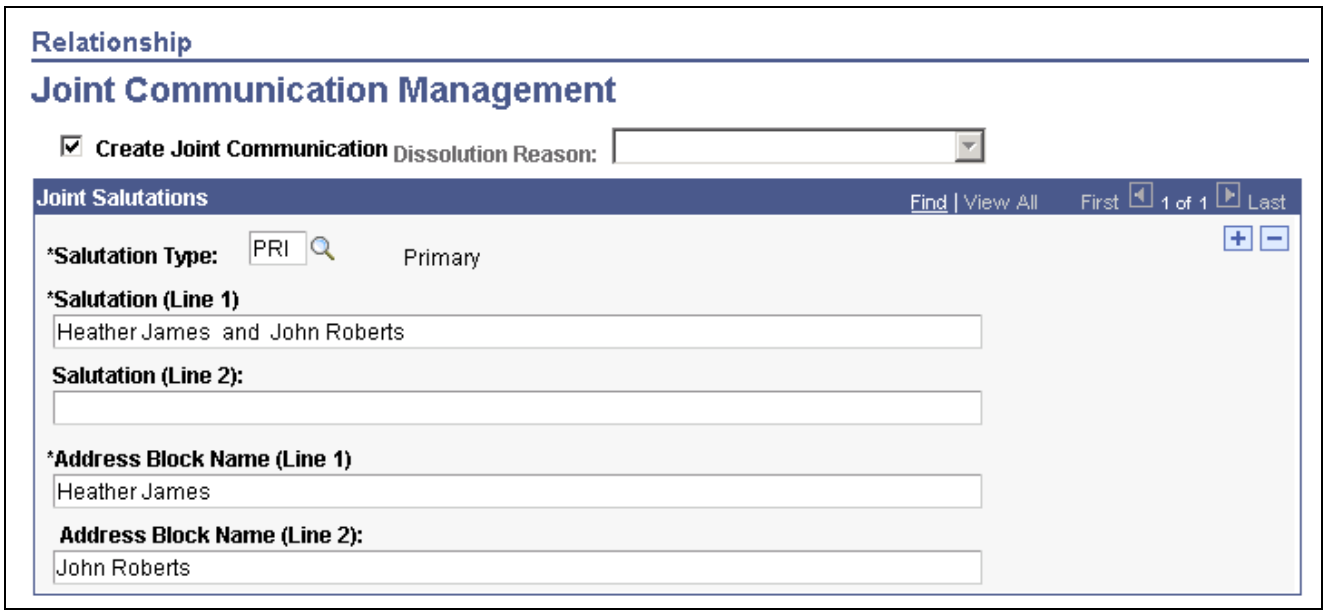
Barbara Smith
Admissions Office

cc Joanne Beatrice Allen
cc Julianne Binoche
cc Ralph E Crowe
cc Ted Han

Example of the CCLTRREC.doc letter created for recipients set on the Communication Recipient page

Creating Joint Communications Relationships

Access the Joint Communication Management page.



Joint Communication Management page

Create Joint Communication Select to address joint communications to both the primary and related individuals, using the salutation that you specify on this page.

Dissolution Reason When you clear the Create Joint Communication check box, or when you inactivate the relationship to stop joint communications for these two individuals, the Dissolution Reason field becomes available, enabling you to enter the reason for dissolving the joint communications. Values include:

Deceased Partner

Divorce

Per Request

Values for this field are delivered with your system as translate values. You can modify these translate values.

Joint Salutations

Salutation Type Specify the type of salutation, from the Joint Salutation Type Table page, to use for joint communications to these IDs.

When you enter a salutation type, the system displays the individual's names in the Salutation and Address Block Name fields, based on the default formats associated with that salutation type. The default formats are designed to reduce data entry; however always validate that the information is correct.

Note. When you select the Create Joint Communication check box, the system displays the default salutation type from the Installation Default – CC page, if you entered one. You can add salutation types, but do not delete the one that you defined as the default value. Use the default value as the lowest level joint usage on the Name Usage page so that when you run the letter generation process, it does not fail due to a lack of salutation type.

Salutation (Line 1), Salutation (Line 2)

The system displays the names of the two individuals as they will appear in the greeting of the letter according to the default salutation format for the salutation type defined on the Joint Salutation Type Table page.

Example values include:

Mr. and Mrs. Smith

or, using two lines:

John Smith

Mary Fletcher

Address Block Name (Line 1) Address Block Name (Line 2)

The system displays the names of the two individuals as they will appear in the address of the letter (and envelope or label if applicable) according to the default address block format for the salutation type defined on the Joint Salutation Type Table page.

Example values include:

Mr. and Mrs. Smith

or, using two lines:

John Smith

Mary Fletcher

Entering Relationship Addresses

Access the Relationship Address page.

Relationship Address page

Related ID (or Name) Address

Address Type

Select the related individual's address type to associate with this relationship.

If the related person does not have an ID in your database, the Edit Address link becomes available for you to manually enter the related person's address data.

When the individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available.

If you do not select an address type, the default value is the address type, if any, selected in the Address For Related IDfield on the Installation Default - CC page.

Joint Address Select to send joint communications for these two individuals to this address.

If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them. You cannot select both. Also, if the related person does not have an ID, this check box is unavailable. For the system to generate a joint communication, the address must be saved with an ID in your system.

Related ID's Addresses If the related person has an ID in your database, you can click this link to access the Addresses page, on which you can view or update the related person's address data.

If the related person does not have an ID in your database, this link is not available.

Primary ID Address

Address Type Select the primary individual's address type to associate with this relationship.

Because the primary individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available.

If you do not select an address type, the default value is the address type, if any, selected in the Address For Primary ID field on the Installation Default - CC page.

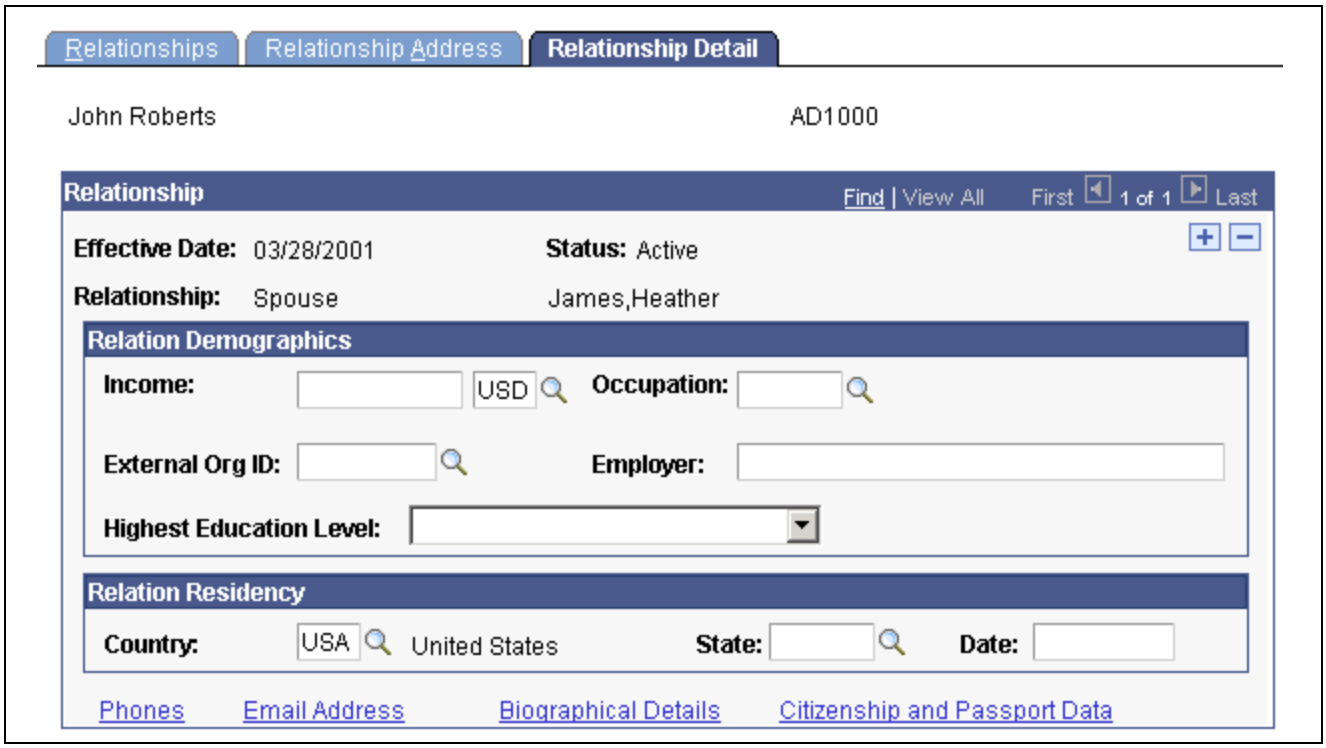
Joint Address Select to send joint communications for these two individuals to this address.

If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them. You cannot select both.

Primary ID's Addresses Click this link to access the Addresses page, on which you can edit or update the primary person's address data.

Entering Relationship Detail Data

Access the Relationship Detail page.



Relationship Detail page

Relation Demographics

For related individuals with or without an ID in your database, enter data in the fields in this area. For a related individual with an ID in your database, you can click the Biographical Details link at the bottom of the page, to review additional information.

Income Enter the amount of the related individual's income and the currency in which it is expressed. The amount is usually expressed annually, but it can be expressed hourly or monthly.

Occupation Enter the related individual's occupation, from the Standard Occupation Classification Code page.

External Org ID If the related person is associated with or employed by an organization that is in your database, identify that organization here.

Employer The system automatically displays the name of the related person's employer if you selected an employer ID. If the employer does not have an organization ID in your database, you can manually enter the employer's name here.

Highest Education Level Specify the highest level of education that the related person has achieved.

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

Relation Residency

Country, State, and **Date** For related individuals with or without an ID in your database, you must enter the related individual's country, state and date of residency information.

Daytime Telephone

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's daytime, evening, and fax telephone numbers.

Email ID

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's email ID and URL.

Country of Citizenship

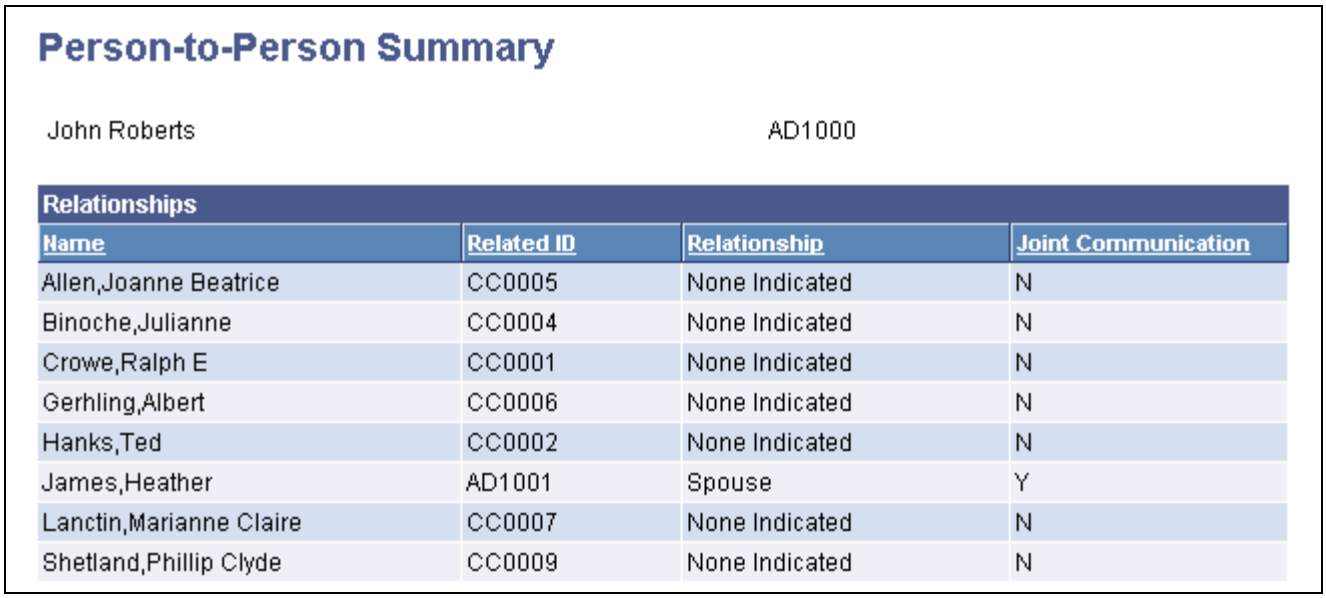
When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's country of citizenship and citizenship status based on the Citizen Status Table page.

Links

Phones	Click this link to access the Phone Numbers page, on which you can review or change telephone numbers for the related ID. For a related individual with no ID in your database, manually enter the individual's phone data in the Daytime Telephone section.
Email Address	Click this link to access the Electronic Addresses page, on which you can review or change URLs and email addresses for the related ID. For a related individual with no ID in your database, manually enter the individual's email data in the Email ID section.
Biographical Details	If this related individual has an ID in your database, click this link to access the Biographical Details page, on which you can review or change additional basic data for the related ID.
Citizenship and Passport Date	Click this link to access the Citizenship/Passport page, on which you can review or change additional citizenship and passport data for the related ID. For related individuals without an ID in your database, you must manually enter the related individual's Citizen Country and Citizenship Status.

Viewing a List of Relationships

Access the Person-to- Person Summary page to view a list of an individual's relationships.



Person-to-Person Summary

John Roberts AD1000

Relationships

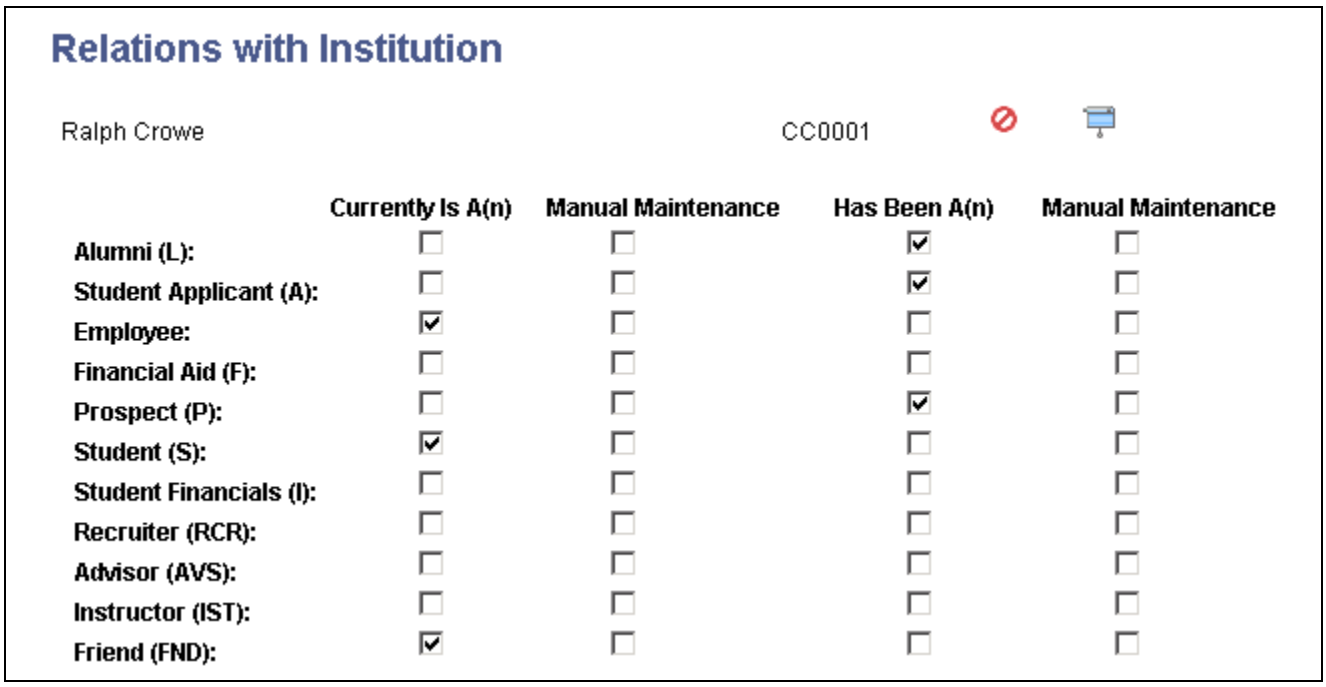
Name	Related ID	Relationship	Joint Communication
Allen,Joanne Beatrice	CC0005	None Indicated	N
Binoche,Julianne	CC0004	None Indicated	N
Crowe,Ralph E	CC0001	None Indicated	N
Gerhling,Albert	CC0006	None Indicated	N
Hanks,Ted	CC0002	None Indicated	N
James,Heather	AD1001	Spouse	Y
Lanctin,Marianne Claire	CC0007	None Indicated	N
Shetland,Phillip Clyde	CC0009	None Indicated	N

Person-to-Person Summary page

The Person-to- Person Summary page is for viewing only. You cannot enter or edit data here. Data that appears here is entered on pages in the Relationships component.

Identifying an Individual's Relationship with the Institution

Access the Relations with Institution page.



Relations with Institution

Ralph Crowe CC0001

	Currently Is A(n)	Manual Maintenance	Has Been A(n)	Manual Maintenance
Alumni (L):	☐	☐	☑	☐
Student Applicant (A):	☐	☐	☑	☐
Employee:	☑	☐	☐	☐
Financial Aid (F):	☐	☐	☐	☐
Prospect (P):	☐	☐	☑	☐
Student (S):	☑	☐	☐	☐
Student Financials (I):	☐	☐	☐	☐
Recruiter (RCR):	☐	☐	☐	☐
Advisor (AVS):	☐	☐	☐	☐
Instructor (IST):	☐	☐	☐	☐
Friend (FND):	☑	☐	☐	☐

Relations with Institution page

Note. PeopleSoft Enterprise Contributor Relations Solutions uses the abbreviations on this page in the contributor relations search.

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Constituent Data," Searching for People.

Currently Is A(n) Select to indicate that the individual is currently related in this way to your institution.

Has Been A(n) Select to indicate that the individual has previously been related in this way to your institution.

Manual Maintenance Select to indicate that this relationship (current or past as appropriate) should be maintained manually and not used or changed by mass change or any other automatic process.

Entering Emergency Contact Data

This section discusses how to

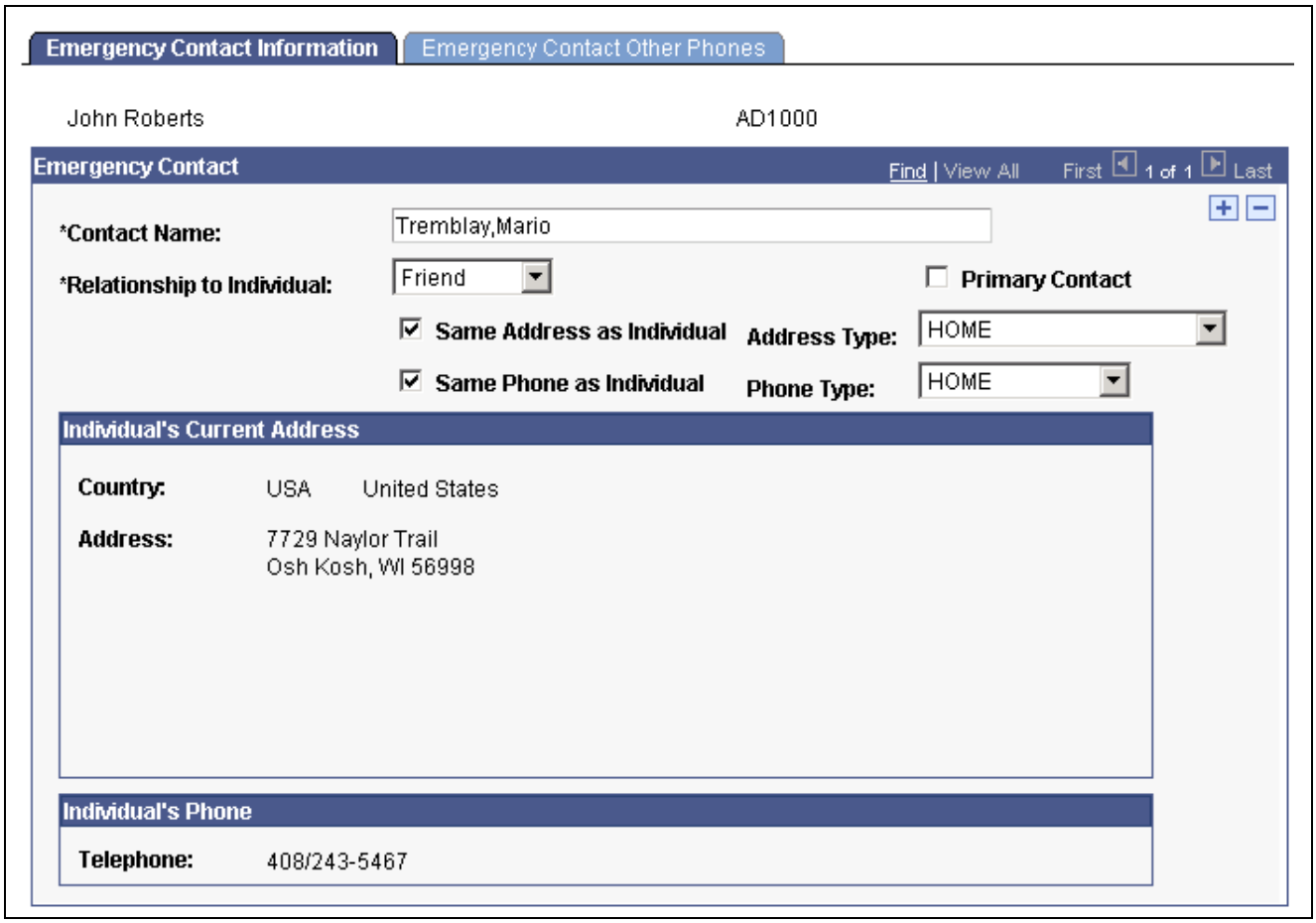
- Enter emergency contact data.
- Enter additional phone numbers for the emergency contact.

Pages Used to Enter Emergency Contact Data

Page Name	Object Name	Navigation	Usage
Emergency Contact Information	SCC_EMERG_CNTCT1	Campus Community, Personal Information, Biographical, Emergency Contacts	Enter an individual's emergency contact data, including the contact's name, addresses, and primary phone number.
Emergency Contact Other Phones	SCC_EMERG_CNTCT2	Campus Community, Personal Information, Biographical, Emergency Contacts, Emergency Contact Other Phones	Enter additional telephone numbers for an emergency contact.

Entering Emergency Contact Data

Access the Emergency Contact Information page.



Emergency Contact Information page

Emergency Contact

Contact Name Enter the name of the emergency contact for this individual.

Relationship to Individual Select the option that indicates the contact's relationship to the individual at your institution.

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

Primary Contact Select to indicate that this is the first person to contact in an emergency. You can enter only one primary contact for an individual.

Same Address as Individual and **Address Type** Select to indicate that the contact has the same address information as the individual in your database, and then select that individual's address type that is the same as this contact's address type. If it is selected, you do not need to complete any of the address fields. The system displays the correct address data.

Note. If Same Address as Individual is not selected, the address area of the page is titled *Contact Address.* When Same Address as Individualis selected, the title becomes *Individual's Current Address.*

Same Phone as Individual and **Phone Type**

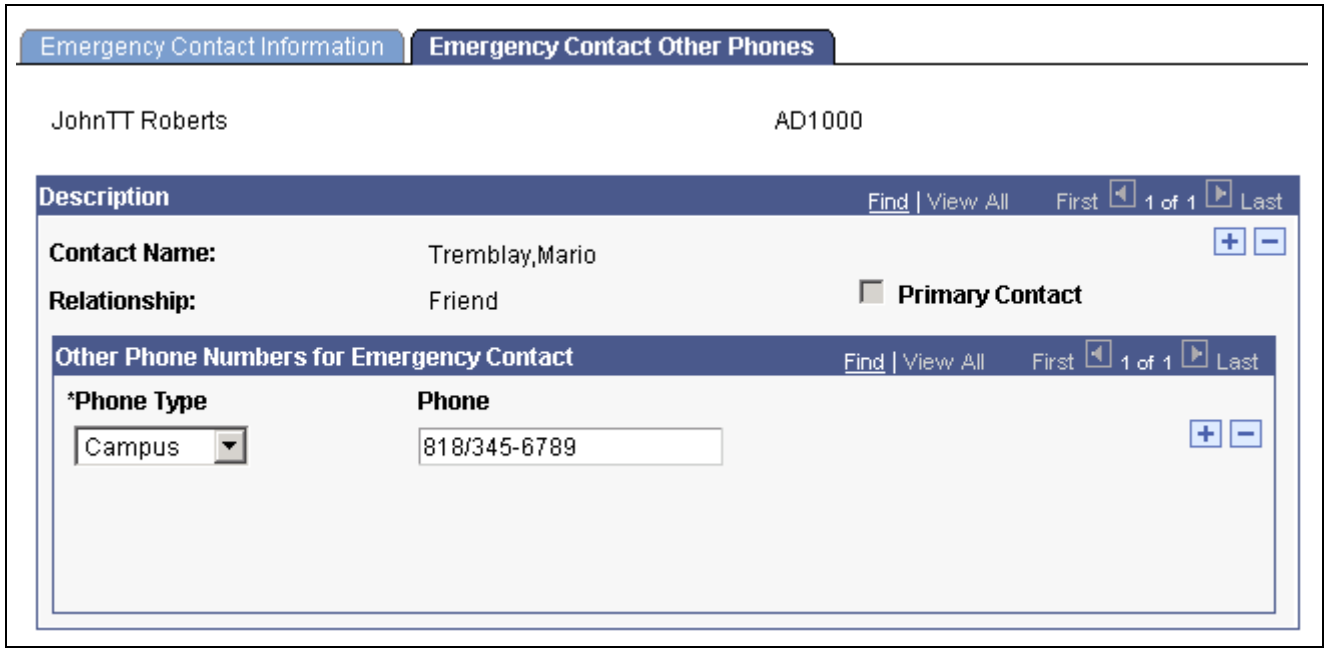
Select to indicate that the contact has the same phone information as the individual in your database, and then select that individual's phone type that is the same as this contact's phone type. If it is selected, you do not need to complete any of the phone fields. The system displays the correct phone data.

An emergency contact can have the same address as the primary individual, but have a different phone number.

Note. If Same Phone as Individual is not selected, the phone area of the page is titled *Contact Phone.* When Same Phone as Individualis selected, the title becomes *Individual's Phone.*

Entering Additional Phone Numbers for the Emergency Contact

Access the Emergency Contact Other Phones page.



Emergency Contact Other Phones page

Other Phone Numbers for Emergency Contact

Phone Type Select the phone type that describes the additional phone number for this emergency contact.

Phone Enter the additional phone number for this emergency contact.

Tracking Work Experience

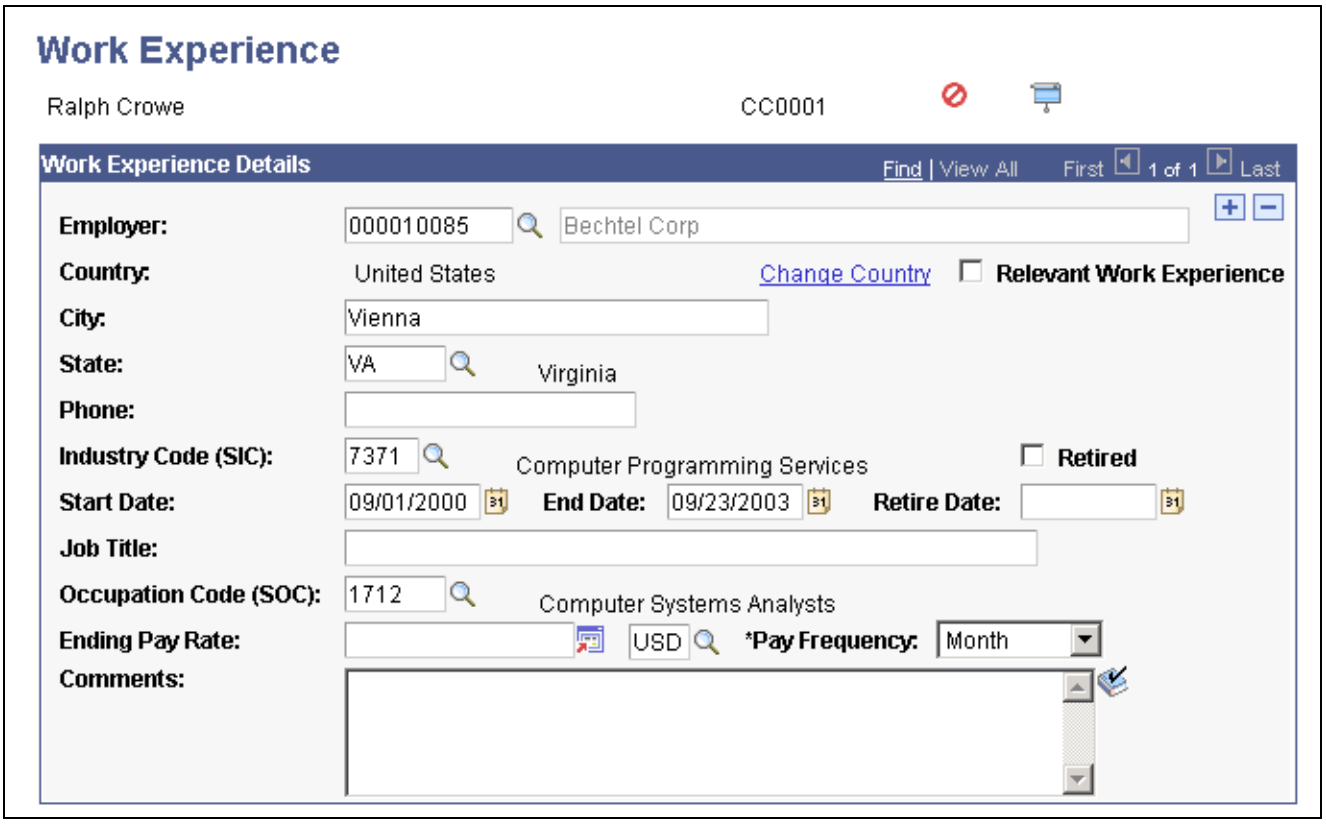
This section discusses how to enter work experience data.

Pages Used to Track Work Experience

Page Name	Object Name	Navigation	Usage
Work Experience	PRIOR_WORK_EXP_SA	• Campus Community, Personal Information, Biographical, Work Experience • Student Admissions, Application Entry, Relationships, Work Experience • Student Recruiting, Maintain Prospects, Relationships, Work Experience • Contributor Relations, Constituent Information, People, Relationships, Work Experience • Student Recruiting, Student Recruiters, Participation and Achievements, Work Experience	Enter data to track an individual's work experience.

Entering Work Experience Data

Access the Work Experience page.



Work Experience Page

Work Experience Details

Employer — If the employer is an organization in your database, enter the organization's ID. The system displays the organization name and address.

If the employer is not an organization in your database, enter the employer's name and address.

Relevant Work Experience — Select to indicate that the former position is relevant to a current position within your institution or to the career that the individual is seeking.

Retired and **Retire Date** — If the person retired from this employer, select this check box and enter the date on which the individual retired.

Industry Code (SIC)(industry code [Standard Industrial Classification]) — Enter the SIC for this position.

Start Date and **End Date** — Enter the dates on which the individual began and ended employment with this employer.

Job Title — Enter the title of the last position that the individual held with this employer.

Occupation Code (SOC)(occupation code [Standard Occupation Classification]) — Select the SOC codes for this position.

Ending Pay Rate	Enter the pay rate and currency at which the individual ended employment.
Pay Frequency	Select the frequency that describes the ending pay rate. The default value is *Month.*
Comments	Enter comments to further describe this work experience.

CHAPTER 23

Managing Health Information

This chapter provides an overview of managing health information, lists prerequisites and common elements, and discusses how to:

- Track audiometric exam data.
- Track eye exam data.
- Track physical exam data.
- Track respiratory exam data.
- Process accommodations.
- Track immunizations and health data.
-

Understanding Health Information

You can track health and medical exam data for every individual in your database. Use the pages described in this section to set up physicians and diagnosis codes, identify accommodation requests due to health and disability requirements, and enter various health exam and results for individuals.

Prerequisites

Before you can enter health data, you must set up health data codes and tables.

See Chapter 10, "Setting Up Health Data," page 107.

Common Elements Used in This Chapter

Baseline Select this check box to indicate that the current examination is the baseline examination for tracking the individual's physical condition over time.

Country The country of the physician's address. When the Physician ID field is entered, and you select the country and exit the Country field, the system displays the physician's address (from the Physician Table - Address page) based on the specified country. If the individual does not have a physician ID in your system, enter his or her address here.

Date Received Enter the date that you received or are entering the information about the test or event.

Date Taken Enter the date that the individual took the test or immunization or completed the event.

Does Not Apply Select this option to indicate that the test or event is not relevant for this individual.

Exam Date The date on which the exam was administered. The default exam date is the system's current date. You can override this date.

Exam Type Select the type of exam for this individual (for example, general health, annual, drug-screening, or fit for duty.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Expiration Date Enter the date that the effectiveness of the test or immunization or event will expire.

Next Exam The date on which this individual should be reevaluated. The system calculates and displays this date based on the examination type that you specify. You can override the calculated date.

The system calculates the dates based on these values:

Annual: One year later.

Exposure: Six weeks later.

Periodic Surveillance: Six months later.

Physician The name of the physician or other specialist who administered the exam.

When you enter the physician ID, the system displays the individual's name. If the individual does not have a physician ID in your system, you must enter his or her name here (or go to the Physician Table - Name page, add the name, and return to this page).

Physician ID Enter the ID of the physician or other medical professional (from the Physician Table - Name page) who administered the exam.

Referral Select the place or people to which this individual is referred for further examination or treatment.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Test Not Taken Select this option to indicate that the individual has not taken the test or has not completed the event.

Test Taken Select this option to indicate that the individual has taken the test or has completed the event.

Tracking Audiometric Exam Data

You can enter and track basic information about hearing tests for individuals in your database, including exam dates and results, exam administrator, and reevaluation date.

This section discusses how to:

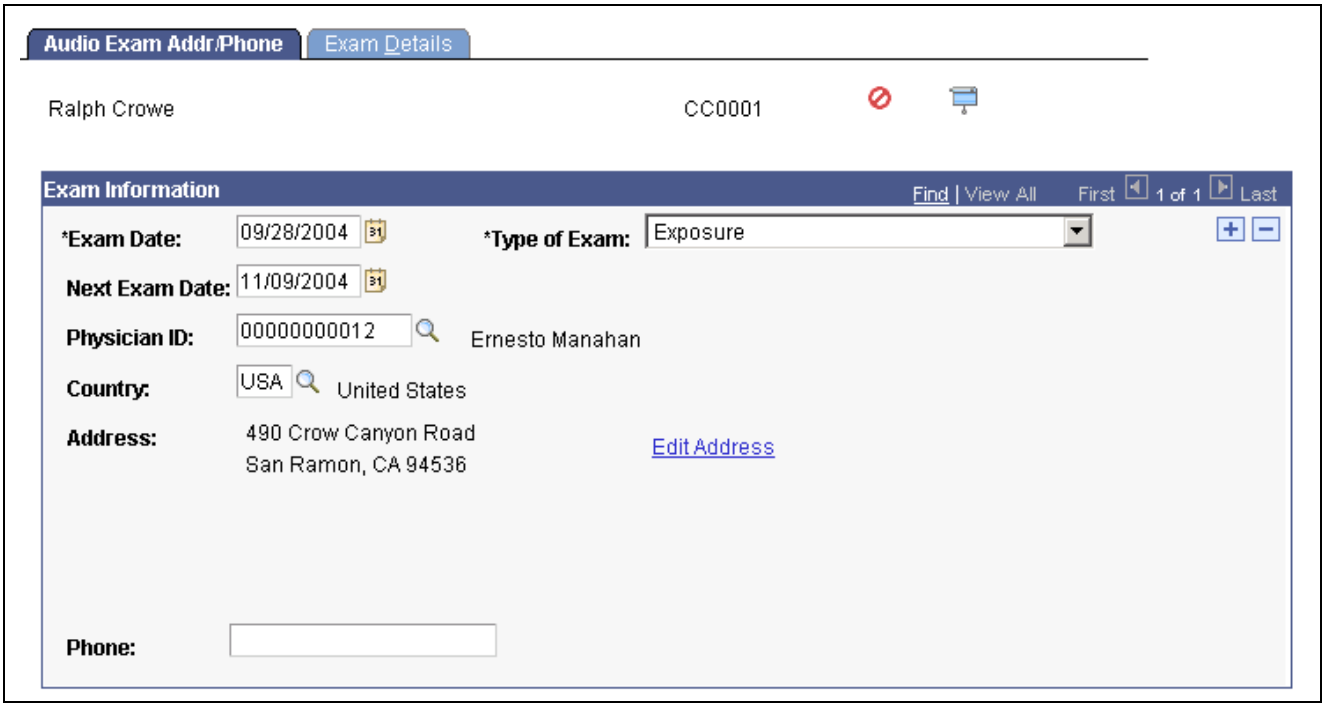
- Enter audiometric exam address and phone data.
- Enter audiometric exam details.

Pages Used to Track Audiometric Exam Data

Page Name	Object Name	Navigation	Usage
Audio Exam Addr/Phone (audiometric exam address/phone)	SCC_HS_EXAM_AUDIO1	Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Audiometric Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of audiometric exam administered.
Exam Details	SCC_HS_EXAM_AUDIO2	Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Exam Details	Enter audiometric exam details, including results, referrals, and comments.

Entering Audiometric Exam Address and Phone Data

Access the Audio Exam Addr/Phone page.

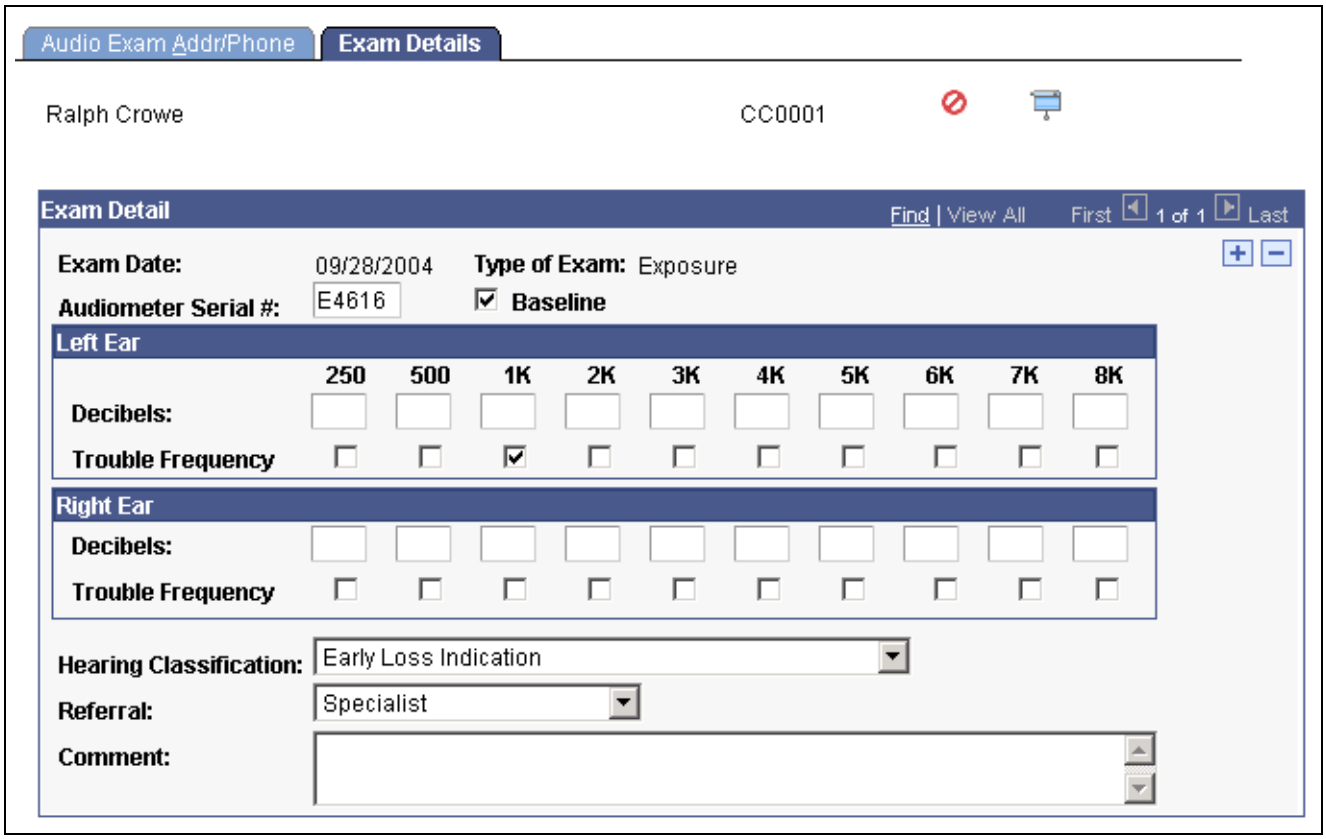


Audio Exam Addr/Phone (audiometric exam address/phone) page

Enter information to describe the exam.

Entering Audiometric Exam Details

Access the Exam Details (Audiometric) page.



Exam Details page for audiometric exams

Audiometer Serial # The serial number of the audiometer that is used to administer this exam.

Decibels For each ear, enter the decibel level at which the individual hears the specified frequency.

Trouble Frequency Select to indicate that the individual did not hear this frequency within the appropriate decibel range.

Hearing Classification Select the classification that describes the results of this exam. Values are *Abnormal, Shift, Early Loss Indication,* and *Normal.*

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Tracking Eye Exam Data

You can enter and track basic information about visual acuity exams, including exam date, exam administrator, and whether the individual needs corrective lenses.

This section discusses how to:

- Enter the eye examiner's address and phone data.

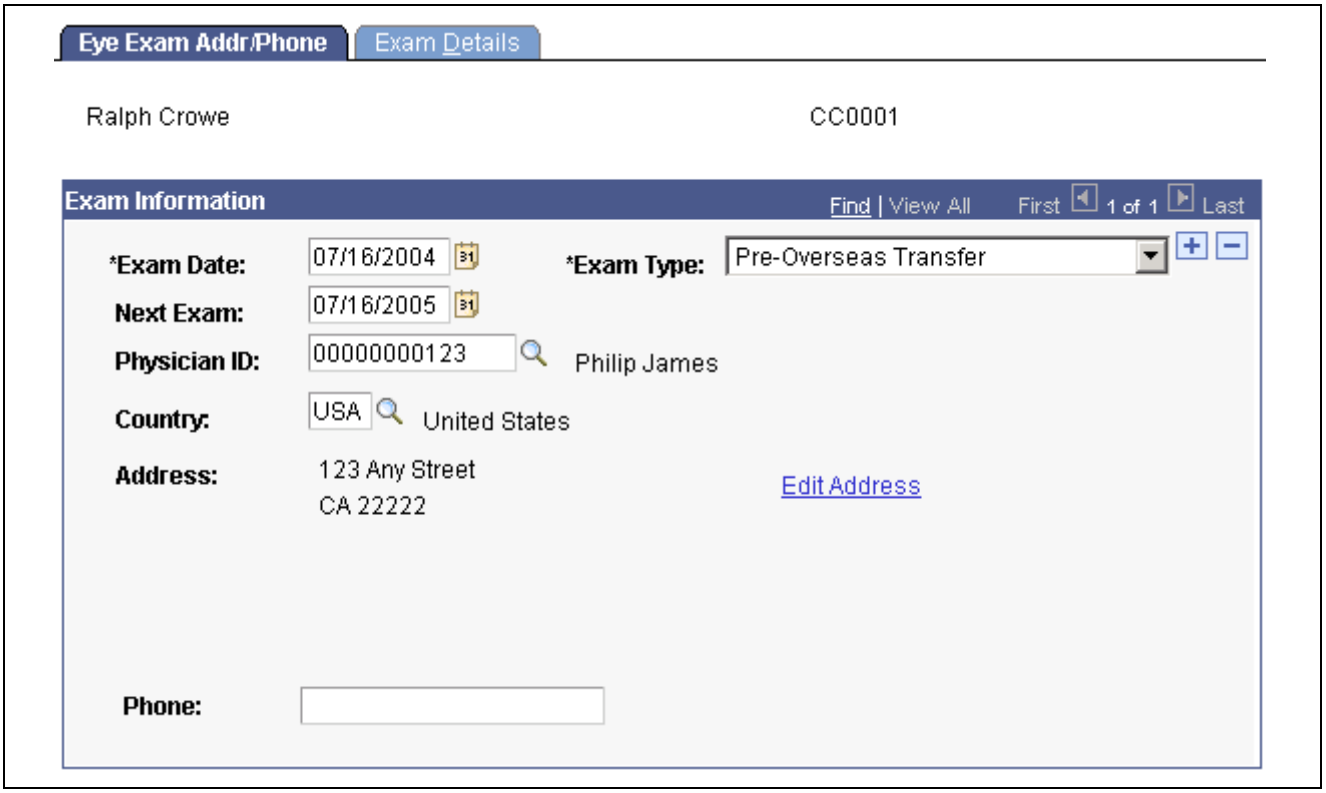
- Enter exam details.

Pages Used to Track Eye Exam Data

Page Name	Object Name	Navigation	Usage
Eye Exam Addr/Phone (eye exam address/phone)	SCC_HS_EXAM_EYE1	Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Eye Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of eye exam administered.
Exam Details	SCC_HS_EXAM_EYE2	Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Exam Details	Enter eye exam details, including results, referrals, and comments.

Entering the Eye Examiner's Address and Phone Data

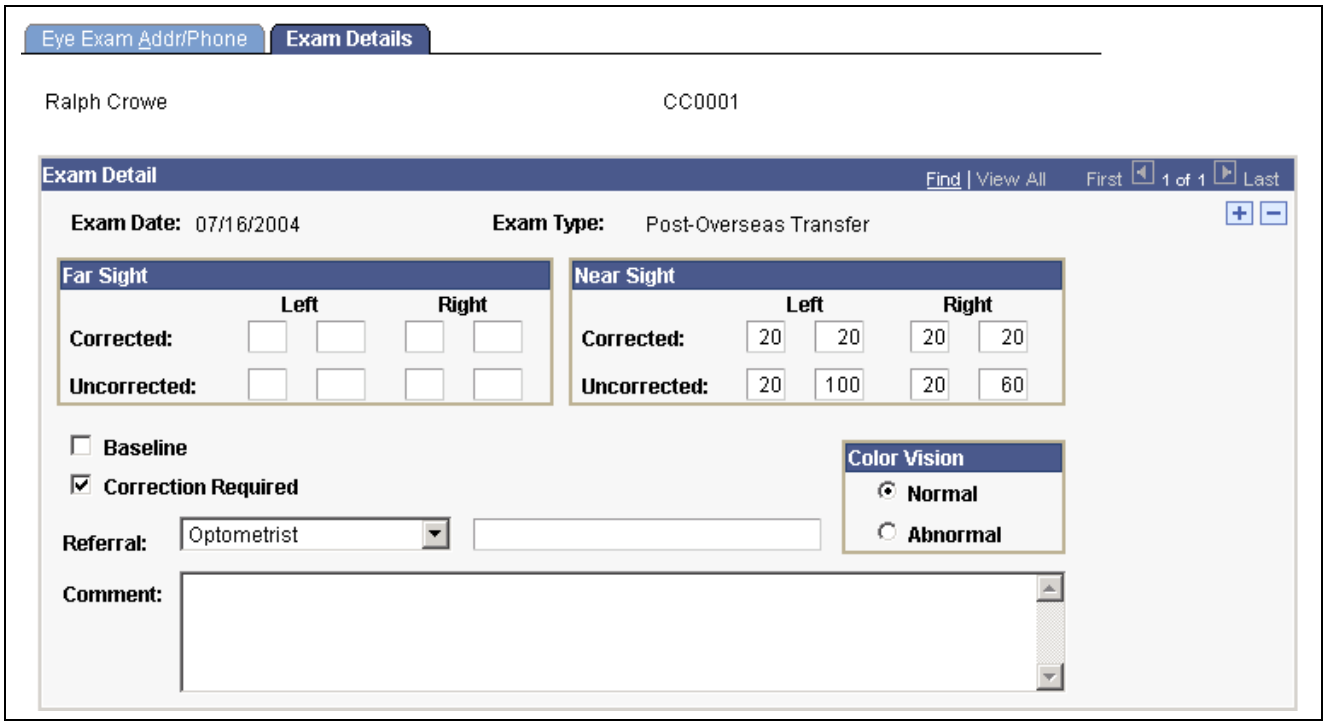
Access the Eye Exam Addr/Phone page.



Eye Exam Addr/Phone page

Entering Eye Exam Details

Access the Exam Details page for eye exams.



Exam Details page for eye exams

Far Sight or Near Sight

Corrected and **Uncorrected** For each eye, enter the visual acuity with and without corrective lenses.

Correction Required Select to indicate that this individual needs lenses or other corrective treatment.

Color Vision

Normal or **Abnormal** Select one of these options to indicate whether the individual's color perception is normal or abnormal.

Tracking Physical Exam Data

You can enter and track basic information physical examinations for individuals in your database, including exam dates and types and who administered the exam. You can also enter an individual's donor information, blood type, referrals, and other comments.

This section discusses how to:

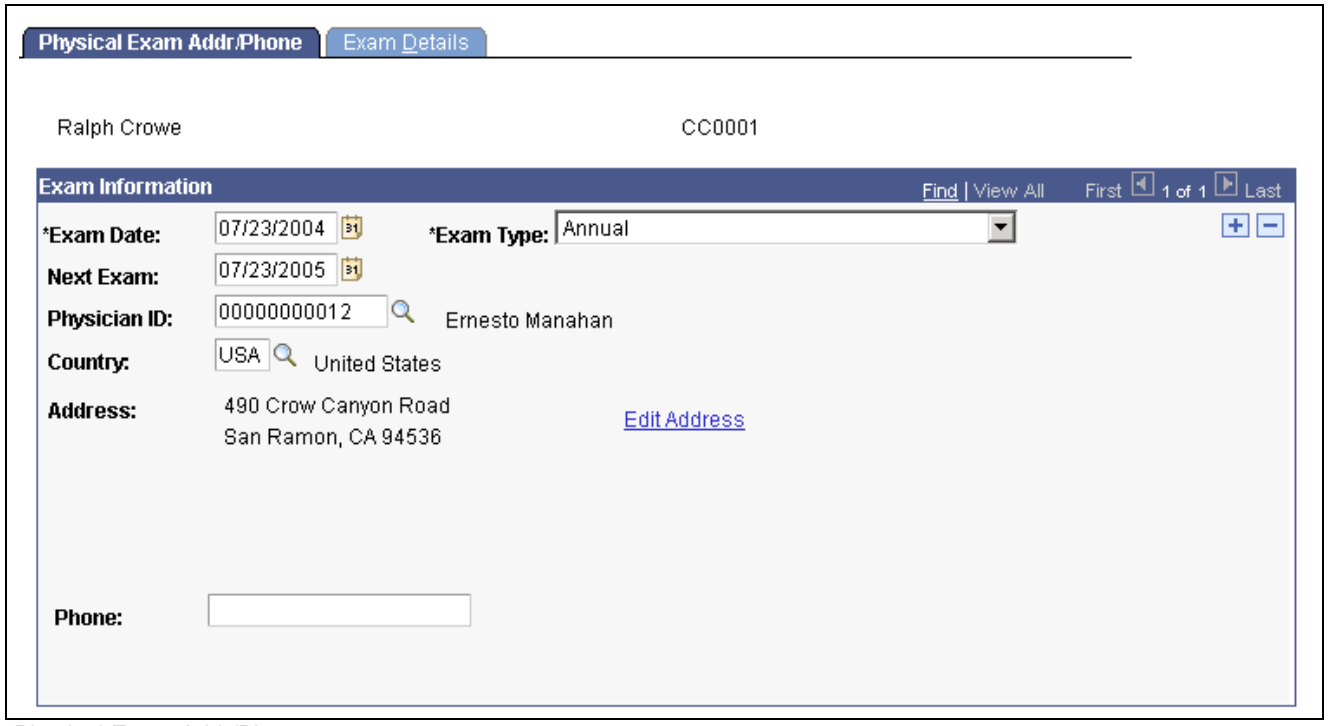
- Enter the physical exam address and phone data.
- Enter physical exam details.

Pages Used to Track Physical Exam Data

Page Name	Object Name	Navigation	Usage
Physical Exam Addr/Phone (physical exam address/phone)	SCC_HS_EXAM_PHYS1	Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Physical Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of the physical exam.
Exam Details	SCC_HS_EXAM_PHYS2	Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Exam Details	Enter details about the exam, including results, donor information, blood type, referrals, and comments.

Entering the Physical Exam Address and Phone Data

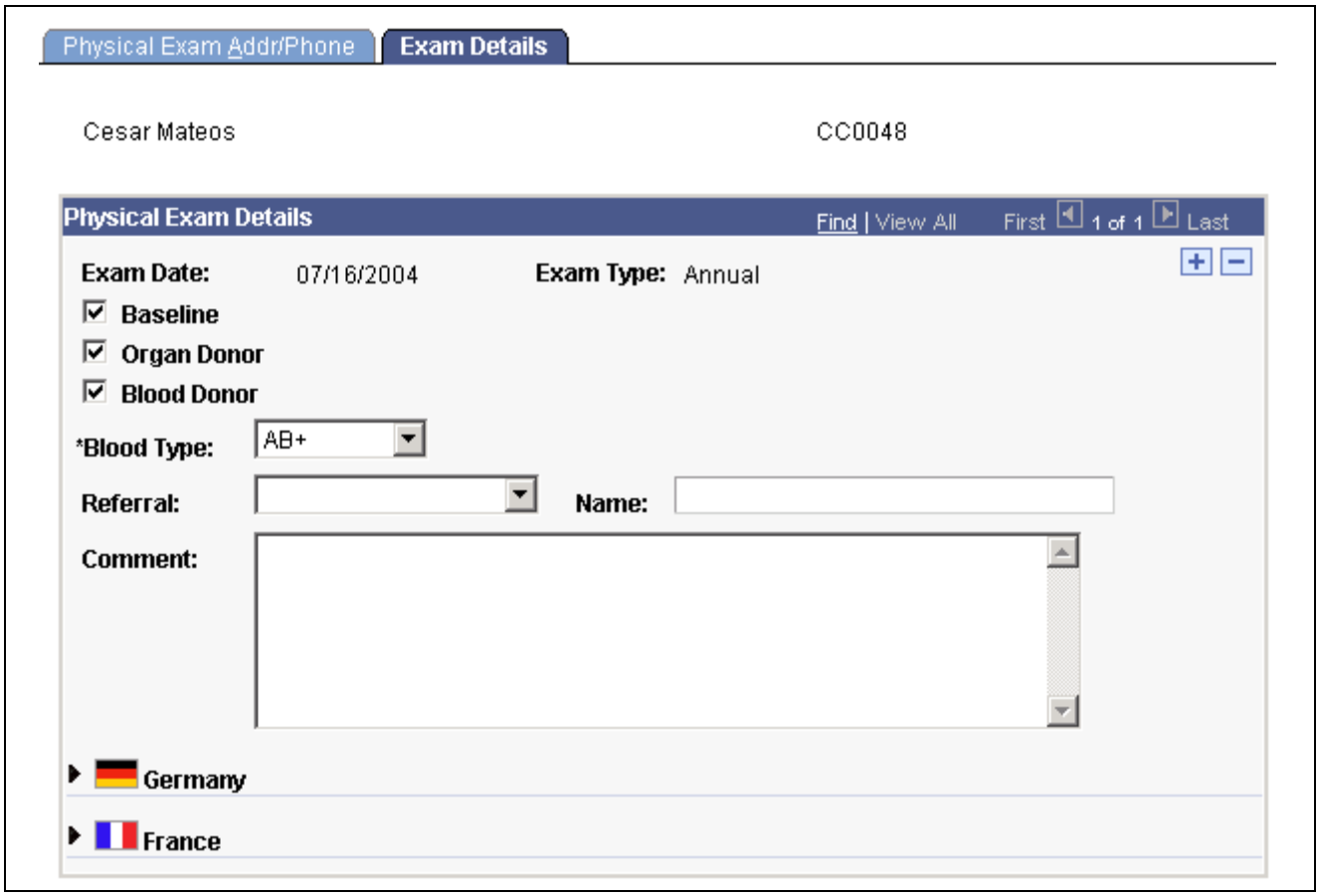
Access the Physical Exam Addr/Phone page.



Physical Exam Addr/Phone page

Entering Physical Exam Details

Access the Exam Details page for physical exams.



Exam Details page for physical exams

Organ Donor and **Blood Donor** — Select to indicate whether this individual is or wants to be an organ donor or a blood donor.

Blood Type — Enter this individual's blood type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Referral and **Name** — Enter the type of professional and name of the person to contact at the place of referral.

Comment — Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Note. For information about physical exam details for (GBR) Germany and (FRA) France, refer to your PeopleSoft Enterprise HRMS documentation.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Setting Up Incident, Injury, and Illness Tracking"

Tracking Respiratory Exam Data

You can enter and track basic information about respiratory examinations for individuals in your database, including exam dates, types, and results; who administered the exam and when the individual should be reevaluated.

This section discusses how to:

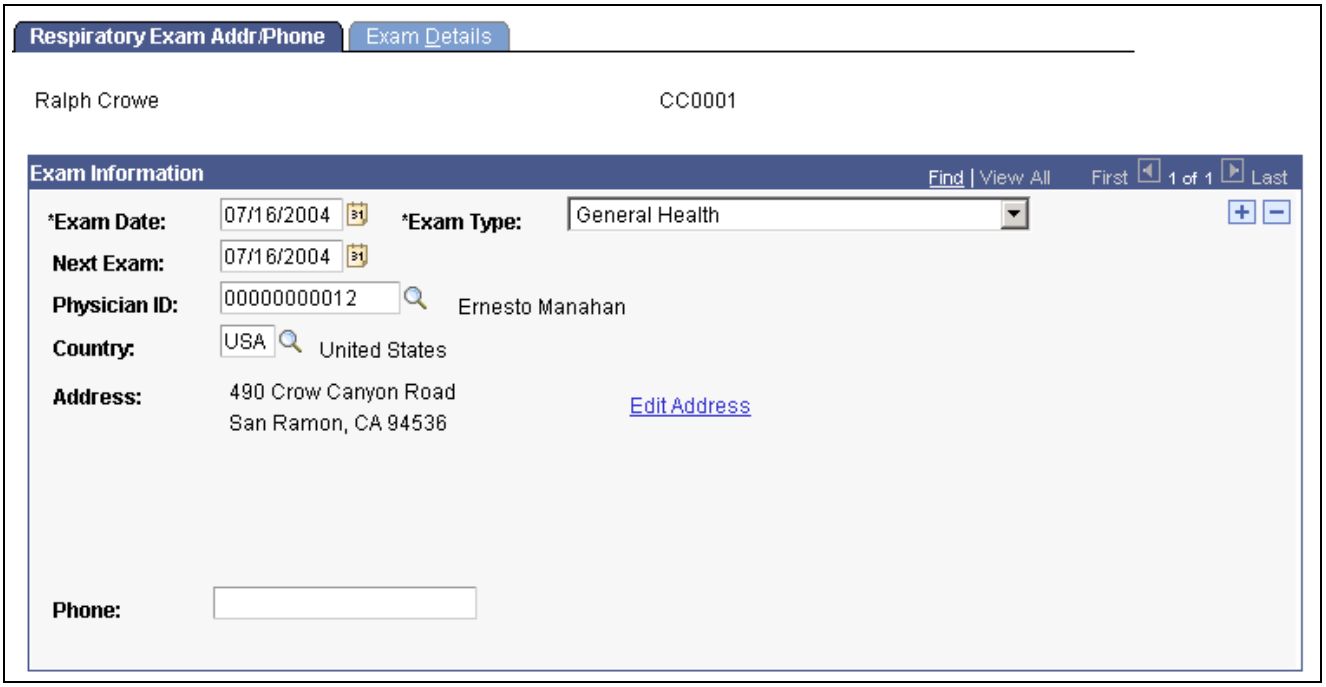
- Enter the respiratory exam address and phone data.
- Enter respiratory exam details.

Pages Used to Track Respiratory Exam Data

Page Name	Object Name	Navigation	Usage
Respiratory Exam Addr/Phone (respiratory exam address/phone)	SCC_HS_EXAM_RESP1	Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Respiratory Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of respiratory exam.
Exam Details	SCC_HS_EXAM_RESP2	Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Exam Details	Enter the respiratory exam details, including results, referrals, and comments.

Entering the Respiratory Exam Address and Phone Data

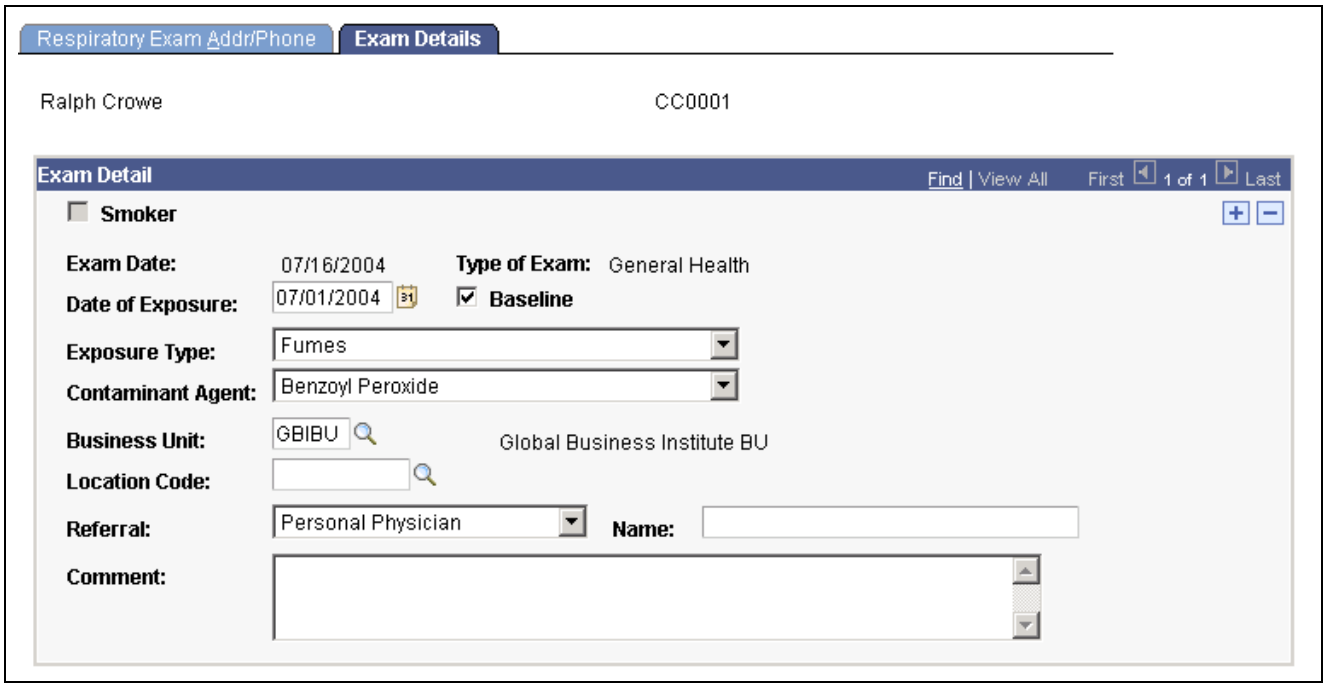
Access the Respiratory Exam Addr/Phone page.



Respiratory Exam Addr/Phone page

Entering Respiratory Exam Details

Access the Exam Details page for respiratory exams.



Exam Details page for respiratory exams

Note. Some fields that appear on PeopleSoft Enterprise Campus Solutions pages are related to PeopleSoft Enterprise HRMS only. For example, the Smoker check box on this page is an HRMS-only option.

Date of Exposure The date when this individual was exposed to the contaminant, causing the need for this exam.

Exposure Type Enter the type of exposure that the individual endured (for example, biohazard, chemicals, or dust).

Values for this field are delivered with your system as translate values. You can modify these translate values.

Contaminant Agent Enter the specific contaminant to which the individual was exposed (for example, asbestos, lead, or Mercury.

Business Unit Select the business unit or department that was responsible at the time of the exposure or contamination

Location Code Select the location where the contamination took place.

Name Enter the name of the person to contact at the place of referral.

Comment Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Processing Accommodations

Use accommodation codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and who is responsible for making them. You can enter data to track the requests for special accommodations and enter diagnosis codes for the disabilities that require the accommodation request. You can also enter various options that your institution might have in response to a request.

Note. Several fields on the Accommodations pages, including Job Code, Job Location, Job Code Tasks, and Regulatory Region, are defined on pages from the HRMS menus. If your institution uses PeopleSoft Enterprise HRMS, see your HRMS documentation to determine how to define and use those items in there. Use these fields as needed in Campus Solutions.

This section lists prerequisites and discusses how to:

- Enter accommodation requests.
- Enter accommodation options.
- Enter accommodation job tasks.

Prerequisites

Before entering and tracking accommodation data, you must:

- Set up codes for types of accommodations.
- Define diagnosis codes to help identify reasons for the accommodation.
- Define regulatory regions.
- Set up business units, job codes, job locations, and job code tasks.

See Also

Chapter 10, “Setting Up Health Data,” Setting Up Accommodations, page 108

Chapter 10, “Setting Up Health Data,” Setting Up Diagnosis Codes, page 107

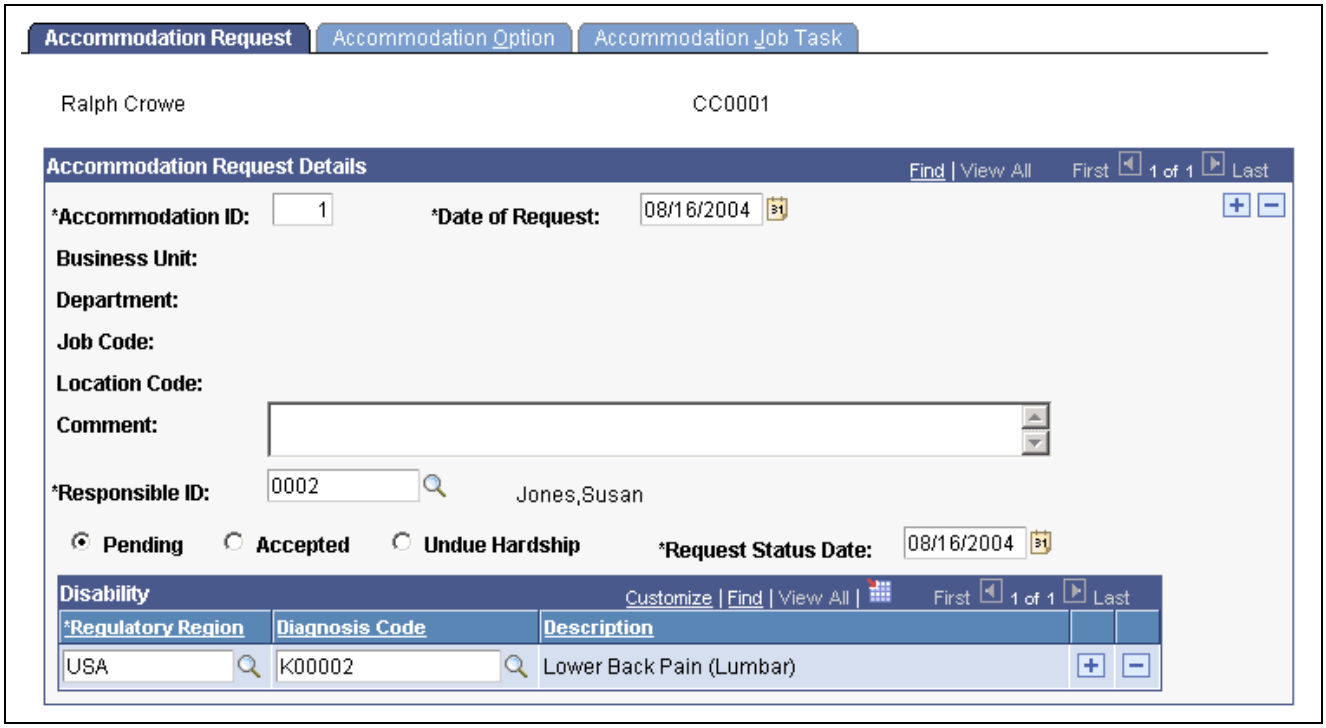
Chapter 2, “Designing Campus Community,” Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, page 11

Pages Used to Process Accommodations

Page Name	Object Name	Navigation	Usage
Accommodation Request	SCC_ACCOMM_REQUEST	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Request	Enter and track an individual's accommodation request.
Accommodation Option	SCC_ACCOMM_OPTION	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Option	Enter and track options for an accommodations request.
Accommodation Job Task	SCC_ACCOMM_JOB_TSK	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Job Task	Enter and track the employee location and job task that is accommodated by honoring the request.

Entering Accommodation Requests

Access the Accommodation Request page.



Accommodation Request page

Accommodation Request Details

Accommodation ID The number of this request on the list of this individual's accommodation requests.

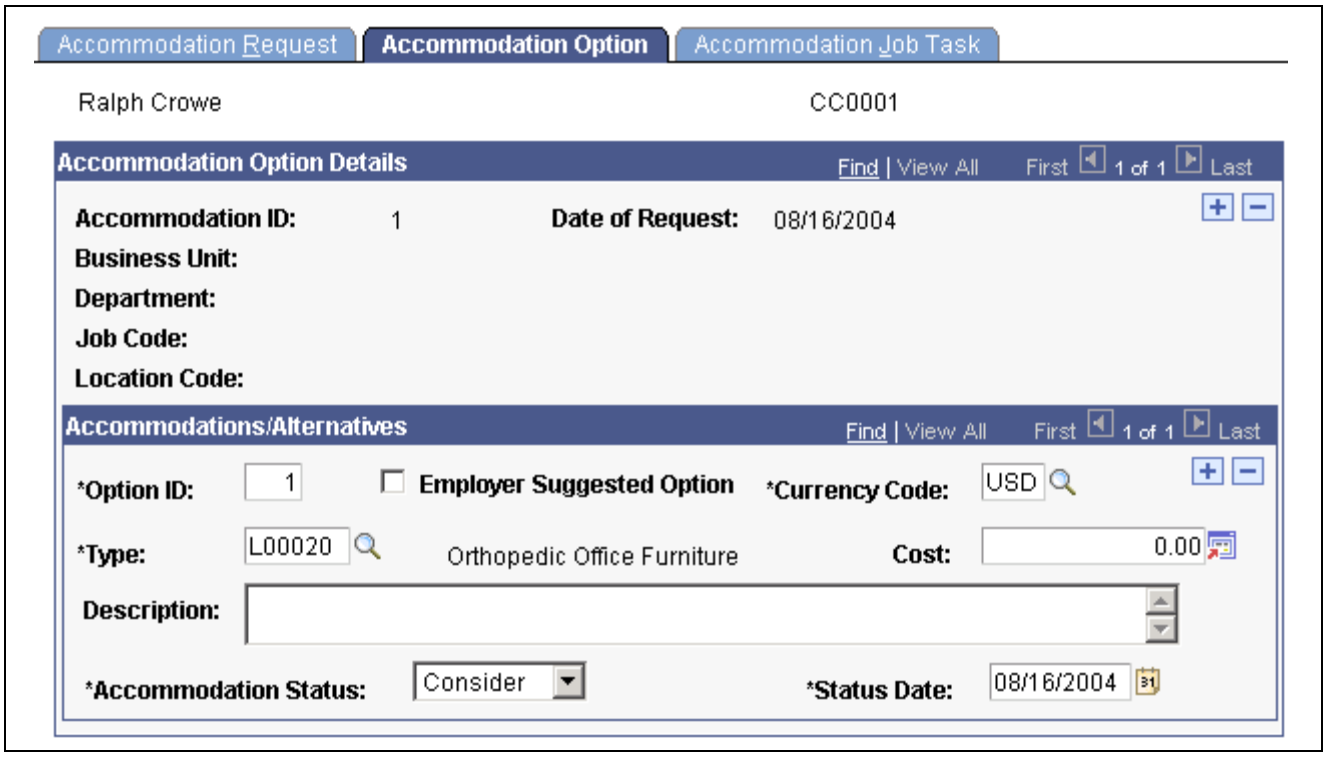
	The system displays the next sequential number for each accommodation request that you add. You can override the number to reorder the list of accommodation requests.
Date of Request	The date of this accommodation request. The default date is the system's current date, which you can override.
Comment	Enter comments that further identify the accommodation request for this individual.
Responsible ID	Enter the ID of the individual at your institution who is managing this request.
Pending, Accepted, or **Undue Hardship**	Select one of these options to indicate whether the request is pending , evaluated and accepted, or evaluated and denied due to an undue hardship on the department or institution.
Request Status Date	Enter the date that the request was changed to a status of pending, accepted, or denied.

Disability

Regulatory Region	Enter the code for the country whose regulations apply to this request.
Diagnosis Code	Enter the diagnosis code (from the Diagnosis Table page) that describes the illness or disability for which accommodations have been requested.
Description	Displays the description that is associated with the diagnosis code that you entered.

Entering Accommodation Options

Access the Accommodation Option page.



Accommodation Option page

Accommodations/Alternatives

Option ID — The system displays the number of this option request in the list of options for this accommodation request.

The system displays the next sequential number for each option that you add. You can override the number to reorder the list of options.

Employer Suggested Option — Select this check box to indicate that a staff person at your institution suggested this option.

Currency Code — Enter the currency in which the cost is expressed.

Type — Enter the type of accommodation (from the Accommodation Type Table page) that is recommended as part of this option.

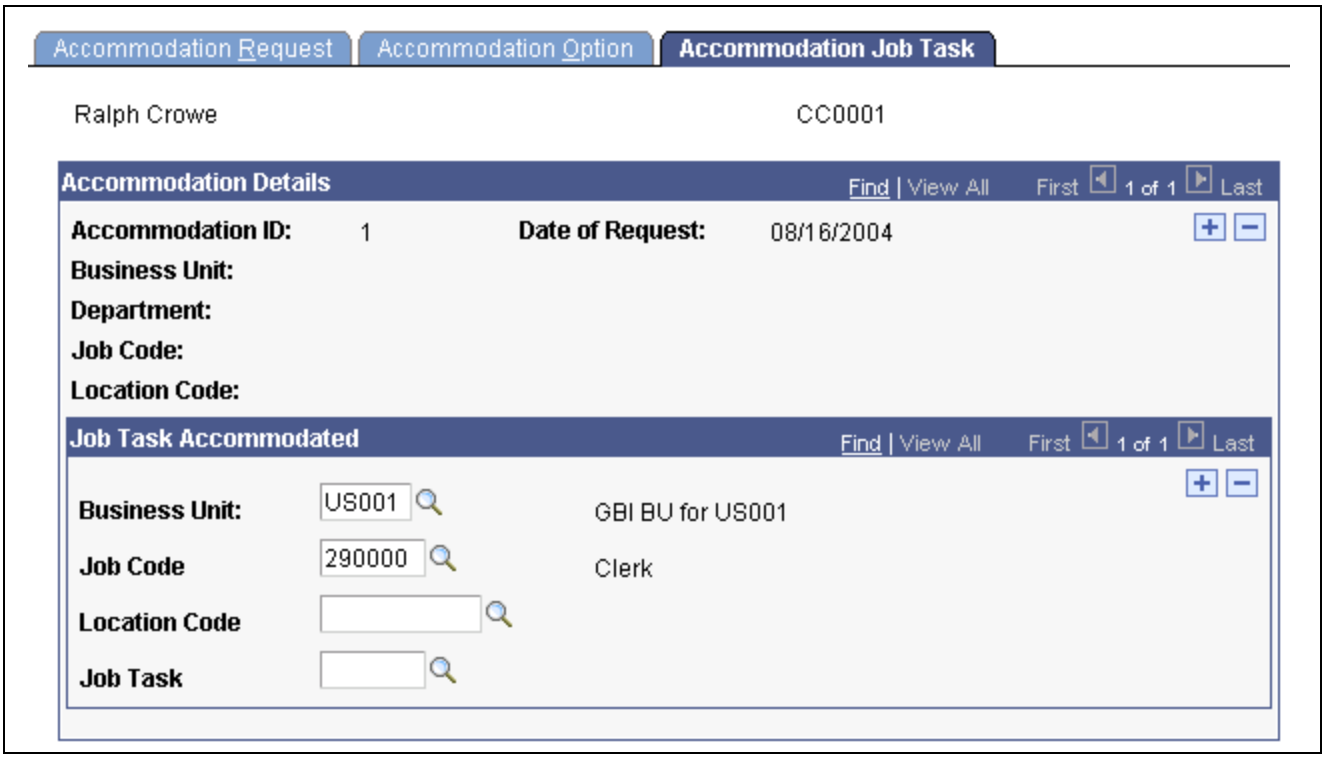
Cost — Enter the cost of this type of accommodation.

Description — Enter comments to further describe or identify the item or service suggested in this option.

Accommodation Status and **Status Date** — Enter the status of this option, (such as accepted, approved, consider, offered, or rejected), and the date of the status.

Entering Accommodation Job Tasks

Access the Accommodation Job Task page.



Accommodation Job Task page

Use fields on this page to process employees.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Documenting Disability Accommodations

Tracking Immunizations and Health Tests Data

Use codes in your system to enter and track an individual's immunization and general health test data.

This section lists prerequisites and common elements and discusses how to:

- Enter immunization data.
- Enter health test data.

Prerequisites

Before you enter and track immunization and health data, define immunization codes, health test codes, and diagnosis codes.

See Also

Chapter 10, "Setting Up Health Data," Setting Up Immunization and Health Test Types, page 108

Chapter 10, "Setting Up Health Data," Setting Up Diagnosis Codes, page 107

Common Elements Used in This Section

Comments Enter comments to further identify or describe the immunization or health test.

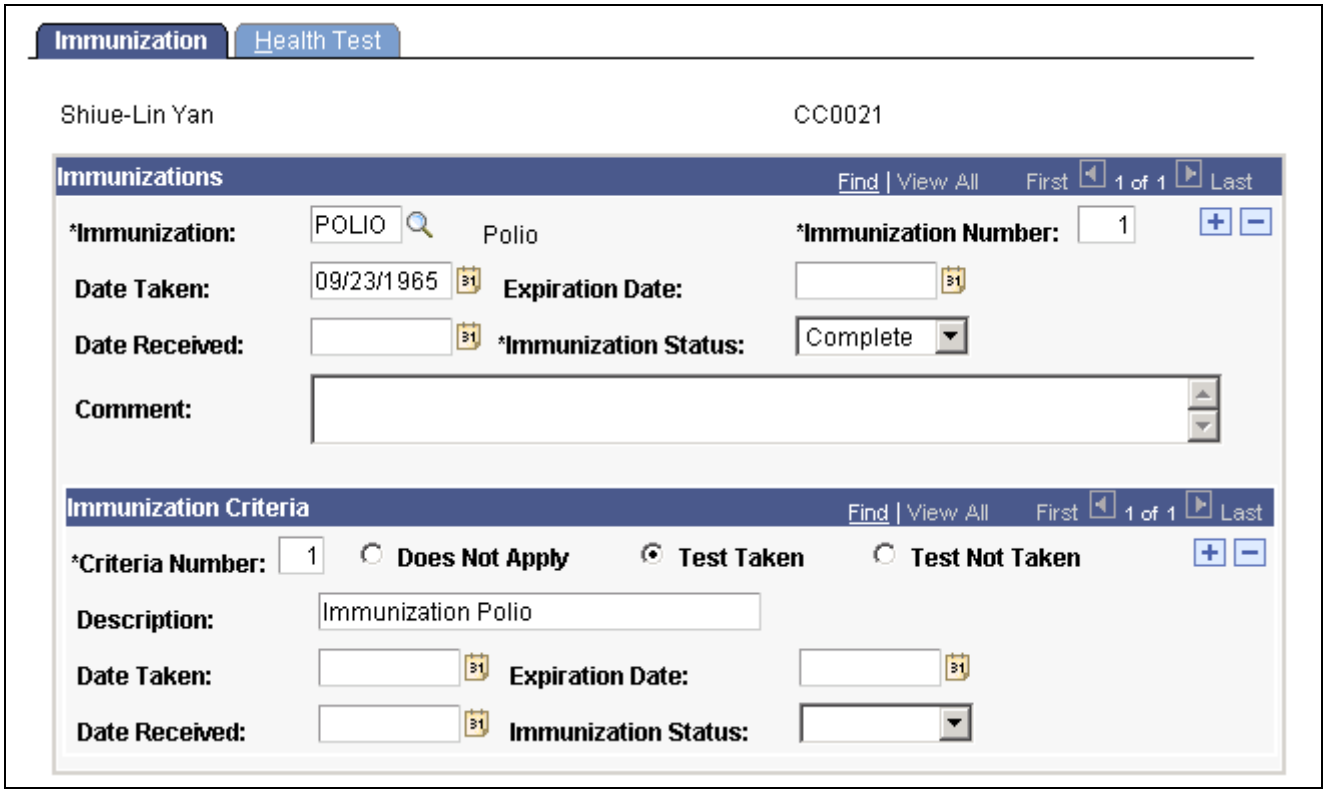
Criteria Number The criteria number for the immunization or health test.

Pages Used to Track Immunization and Health Data

Page Name	Object Name	Navigation	Usage
Immunization	IMMUNIZATION	Campus Community, Personal Information, Health Information, Immunizations and Health, Immunization	Enter immunization data for an individual.
Health Test	HEALTH_TEST	Campus Community, Personal Information, Health Information, Immunizations and Health, Health Test	Enter or review data from an individual's health test.

Entering Immunization Data

Access the Immunization page.



Immunization page

Immunizations

Immunization Enter the immunization, from the Immunization Table page, that this individual has received.

Immunization Number The number of this immunization on the list of immunizations for this individual.

The system displays the next sequential number for each immunization that you add. You can override the number to reorder the list of immunizations.

Immunization Status Select the status of this immunization, such as complete, not on file, or partial.

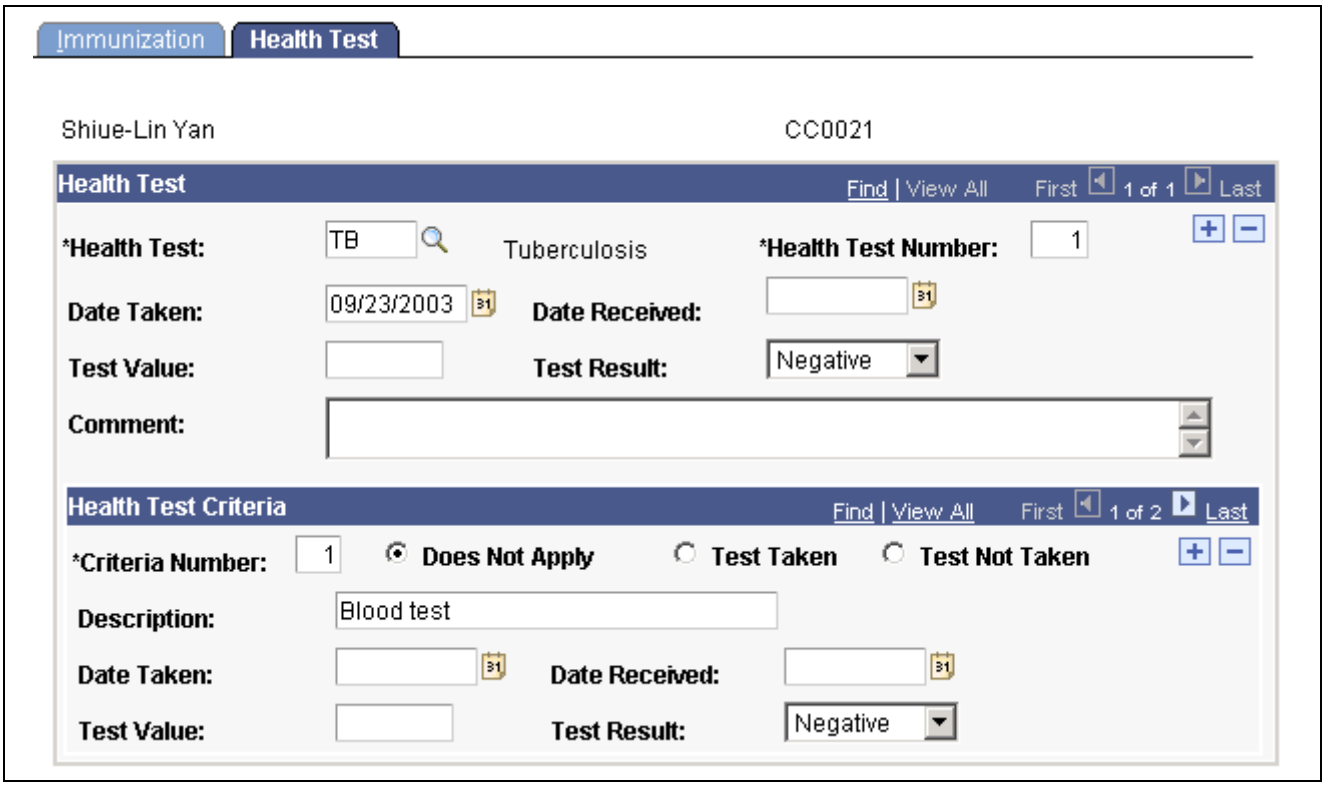
Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Immunization Criteria

When criteria are associated with this immunization on the Immunization Table page, the system displays the criteria data in this group box.

Entering Health Test Data

Access the Health Test page.



Health Test page

Health Test

Health Test Select the health test, from the Health Test Table page, that this individual has taken.

Health Test Number The number of this health test on the list of health tests for this individual.

The system displays the next sequential number for each health test that you add. You can override the number to reorder the list of health tests.

Test Value Enter the test result value, in alphabetic, numeric, percentage, or other form, as expressed by the medical community (for example, AB or O for blood type; or 177 for cholesterol.

Test Result Select the overall test result. Values are:

Negative

Neutral

Positive

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

Health Test Criteria

When criteria are associated with this health test on the Health Test Table page, the system displays the criteria data in this group box.

CHAPTER 24

Managing Identification Data

This chapter provides an overview of identification data and discusses how to:

- Enter citizenship data
- Enter driver's license data
- Enter external system IDs
- Enter residency data
- Enter photographs
- Enter personal identification numbers (PINs)

Understanding Identification Data

You can scan photos and enter driver's license data in your database to help you identify and recognize individuals at your institution.

Your institution might require an individual's driver's license number and the state from which the license was issued. Your institution might also want to know if the driver's license is valid and how many violations and points are on driver's record. Driver's license and driver's record information might be considered when issuing parking permits, granting the use of departmental vehicles, or maintaining carpools.

You can upload photos to your database to help identify individuals. Use your institution's image importing method to place the image in a file on your computer and save it in *jpeg* format. Then, using the Photo page, you can upload that image to the individual's record in your database.

You can track the official and self-reported residency of individuals at your institution. You can also enter data for residency appeals.

You can also enter and track IDs from external systems and correlate them to individuals or organizations in PeopleSoft Enterprise Campus Solutions. For example, if your institution uses a separate housing database, you could identify the individual's housing ID.

Use the Personal Identification Number page to assign PINs to individuals as required at your institution. For example, if your institution uses a separate housing database and individuals need a PIN to access their own housing information, you can assign that here.

Using the Citizenship pages, you can enter multiple countries of citizenship and multiple passports for individuals, and track their visa and permits data.

Note. (USA) Use PeopleSoft Patriot Act SEVIS Solutions (PASS) visa processing functionality to track foreign students and exchange visitors and their dependents as required by the U.S. Department of Homeland Security (DHS).

See Chapter 28, "Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing," page 321.

Entering Citizenship Data

This section provides overviews of citizenship and passport data and visa and permit data, and discusses how to:

- Enter citizenship and passport data.
- Enter visa and permit data.

Understanding Citizenship and Passport Data

An important component of the data that you must track for students or employees who travel internationally to or from your institution is passport and citizenship information. Using the Citizenship/Passport Data pages, you can enter multiple countries of citizenship and multiple passports for individuals.

Using the country codes and citizen status codes in your system, you can identify an individual's country of citizenship, the current status of that citizenship, when citizenship was issued, and when citizenship expires.

Understanding Visa and Permit Data

If your institution admits foreign students or hires individuals who are not citizens of the country where your institution is, you should set up codes that classify the types of visas and permits required by the appropriate governments.

Using the Supporting Document Table page, you can set up document codes to identify birth certificates, letters of employment, immigration application letters, and other documents required to obtain I-9 verification for individuals attending your institution.

Note. If you license and use PeopleSoft Enterprise HRMS, many supporting document IDs and visa and permit types might already exist in your system.

Each country has its own regulations for permitting foreign employees to work, visit, or reside there. To track information about the visas and permits required for individuals to work at, visit, or attend your institution, use the Visa/Permit Data page.

You can also use your system to prepare visa forms. You can enter data for DS-2019 forms for international applicants, students, professors, and visitors who need a J1 Visa. You can also prepare and print I-20 forms for international students who are admitted to or currently enrolled in your institution and who need an F1 Student Visa.

Prerequisites

Before entering citizenship data for an individual, you must define levels of citizenship status for each country and visa and permit types.

See Also

Chapter 9, "Setting Up Identification Data," Setting Up Citizenship and Passport Data, page 105

Chapter 9, "Setting Up Identification Data," Setting Up Visa and Permit Data, page 105

Page Used to Enter Citizenship Data

Page Name	Object Name	Navigation	Usage
Citizenship/Passport	LS_CITIZEN_PASSPRT	Campus Community, Personal Information, Identification, Citizenship, Citizenship and Passport	Enter citizenship and passport data for an individual.
Visa/Permit	SCC_VISA_PERMIT	• Campus Community, Personal Information, Identification, Citizenship, Visa Permit Data • Click the Visa/Permit link on the Biographical Details page.	Enter and track an individual's visa and permit information.
Port of Entry	SEV_POE_DATA	Campus Community, Personal Information, Identification, Citizenship, Visa Permit Data, Port of Entry Data	Enter information to identify the individual's entry point into the area.
DS-2019	DS2019_FORM1, DS2019_FORM2, DS2019_FORM3, DS2019_FORM4, DS2019_FORM5, DS2019_FORM6, DS2019_FORM7	Campus Community, SEVIS, DS-2019 Forms, DS-2019 Form	Enter data for preparing DS-2019 forms for an international applicant, student, professor, or visitor who needs a J1 Visa.
I-20	I20_FORM1, I20_FORM2, I20_FORM3, I20_FORM4, I20_FORM5, I20_FORM6, I20_FORM7	Campus Community, SEVIS, I-20 Forms, I-20 Form	Enter data for preparing I-20 forms for an international student who is admitted to or currently enrolled in your institution and who needs an F1 visa.
Citizenship / Country / Visa,	PRCSRUNCNTL	Campus Community, Personal Information, Identification, Citizenship, Citizenship Country Visa Audit	Generate the Citizenship Status and Country report (PER033) to audit citizenship status.
Passport / Visa Expiration,	PRCSRUNCNTL	Campus Community, Personal Information, Identification, Citizenship, Passport Visa Expiration Rpt, Passport / Visa Expiration	Generate the Passport/Visa Expiration report (PER032) to audit passport and visa status.

Entering Citizenship and Passport Data

Access the Citizenship/Passport page.

Citizenship/Passport page

Citizenship/Passport

Country Specify the country of the individual's citizenship.

Citizenship Status Specify the status (for example, native, naturalized, or alien permanent) of this individual's citizenship in the specified country. These status values are from the Citizen Status Table page.

Passport Information

Passport Number Enter the number from the individual's official passport.

Issue Date Enter the official issuance date that is stamped on the passport.

Expiration Date Enter the official expiration date that is stamped on the passport.

Country Specify the country where the passport was issued.

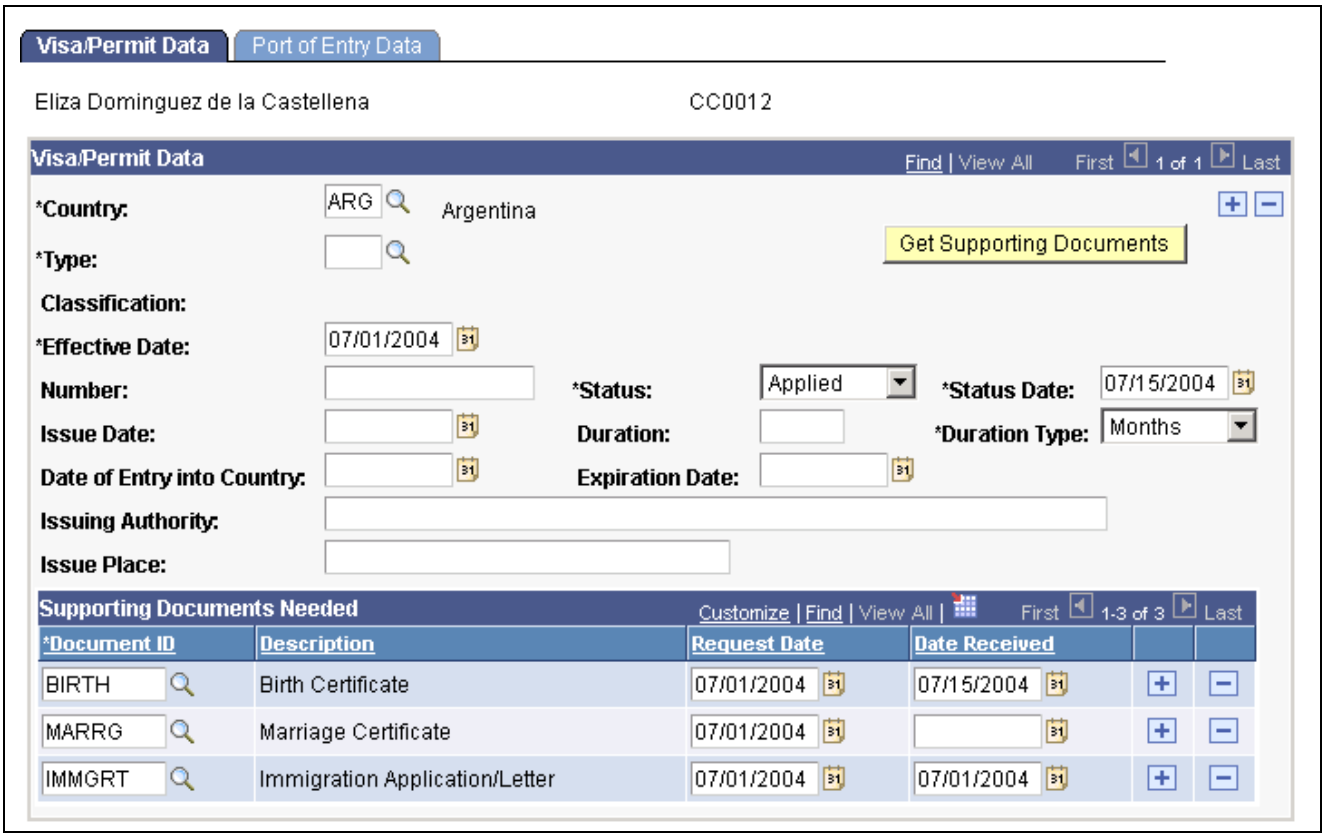
Additional location fields appear based on the country that you select, so that you can provide additional location details, such as city and state or province.

Authority Enter the name of the agency or authority that issued the passport.

Comment Enter comments to further describe the individual's citizenship, passport, or nature of the issuance of the passport.

Entering Visa and Permit Data

Access the Visa/Permit Data page.



Visa/Permit Data page

Note. This is the page to which you are transferred when you click Visa/Permit Data on the Biographical Details page.

Visa/Permit Data

Country Specify the issuing country for the individual's visa or permit.

Type Select the type of visa or permit, from the Visa/Permit Table page. The available types are based on the country specified.

Classification Displays the classification based on the type of visa or permit selected.

Effective Date Enter the date on which the visa or permit is effective or the date on which the information should become effective in your database.

Number Enter the issuance number from the individual's official visa or permit.

Status The status of the official visa or permit. Values are:

Applied

Granted

Renewal

Renewed

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

Status Date Enter the date of the status. The default status date is the system's current date. You can override this date.

Duration Specify the length of time during which the visa or permit is valid. Enter the number in the first field, and in the second field specify the period, such as days, months, terms, or years.

Values for the second field are delivered with your system as translate values. You can modify these translate values.

Issue Date Enter the date of issuance from the individual's official visa or permit.

Date of Entry into Country Enter the official date on which the individual entered your institution's country.

Expiration Date Enter the date on which this individual's visa or permit expires. The system calculates the expiration date based on the specified duration and the date of entry into the country. You can override the system-calculated date.

Issuing Authority Enter the name of the agency or authority that issued the official visa or permit.

Issue Place Enter the name of the location where the official visa or permit was issued.

Supporting Documents Needed

Supporting Document ID Select the supporting documents that are required for this type of visa or permit.

Get Supporting Documents Click this button to retrieve the supporting document IDs and descriptions from the Visa/Permit Table page for this visa or permit type.

Request Date Enter the date on which your institution requests the supporting document.

Date Received Enter the date on which your institution receives the supporting document.

Entering Driver's License Data

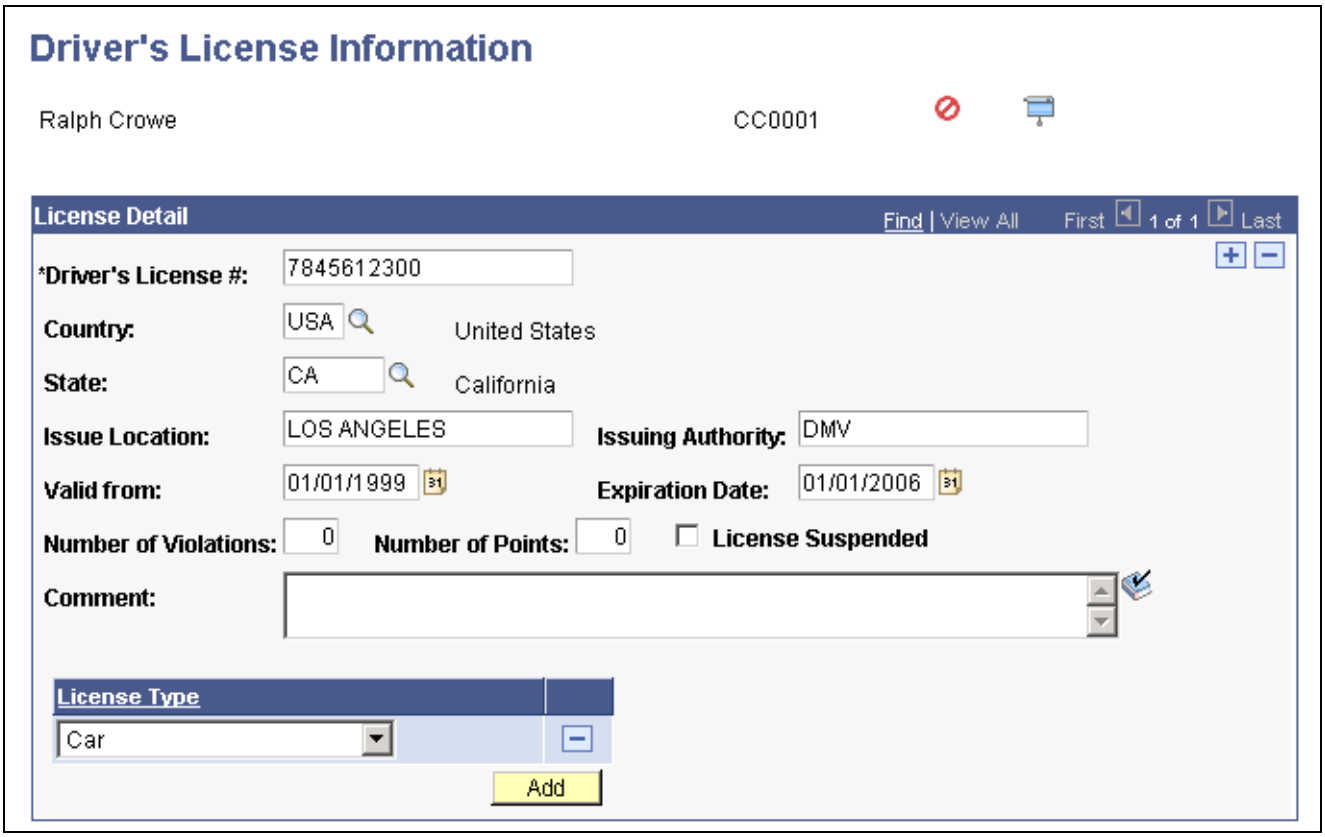
This section discusses how to enter driver's license data.

Page Used to Enter Driver's License Data

Page Name	Object Name	Navigation	Usage
Driver's License Information	DRIVERS_LIC_SA	Campus Community, Personal Information, Identification, Driver's License Data	Enter license numbers and driving record information.

Entering Driver's License Data

Access the Driver's License Information page.



Driver's License Information page

License Detail

Driver's License #(driver's license number) The number from the individual's driver's license.

Country The country in which the license was issued.

State The state in which the license was issued.

Issue Location The location where the license was issued. For example, this can be the street address, the city, the county, or whatever your institution decides.

Issuing Authority The authority or agency that issued the license. For example, this can be the name of the motor vehicle agency.

Valid from The date that the license became effective, which is usually the issuing date.

Expiration Date The date that the license expires.

Valid from/to The dates for which the license is valid, which is usually the issuing date and the expiration date.

Number of Violations The number of traffic violations on record for this individual.

Number of Points The number of points on record for this individual.

License Suspended Select this check box to indicate that this individual's driver's license is currently suspended.

Comment Enter information to further identify or describe this individual's driver's license or driver's record.

License Type The type of driver's license, such as car, chauffeur, class C, motorcycle, or truck, that is issued to this individual under the specified license number. Add a new license if the license number is different.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Entering External System IDs

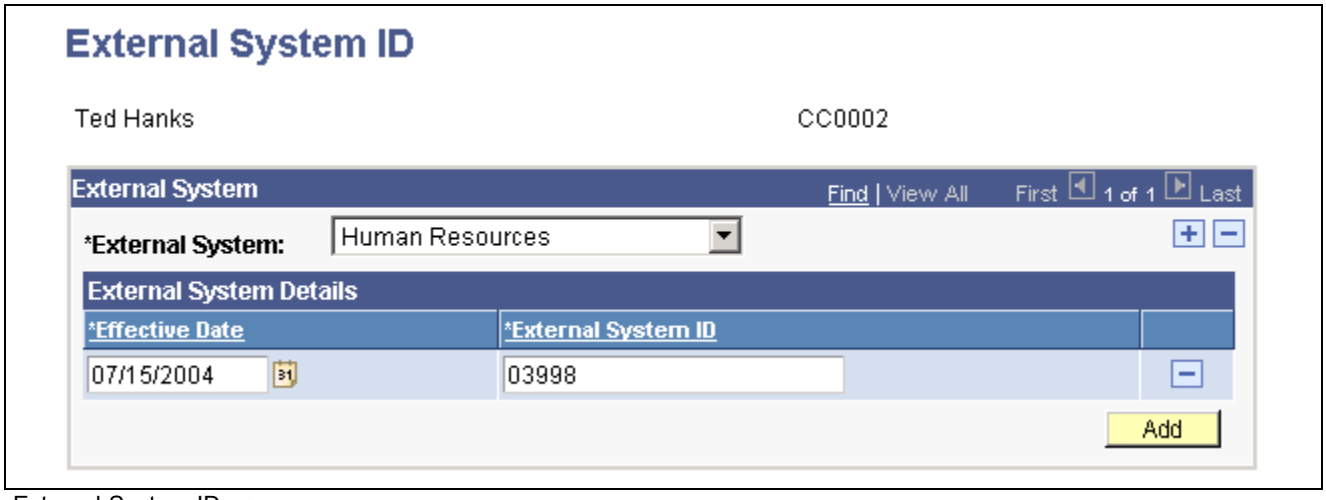
This section discusses how to enter external system IDs.

Page Used to Enter External System IDs

Page Name	Object Name	Navigation	Usage
External System ID	EXTERNAL_SYS_ID	Campus Community, Personal Information, Identification, External System ID	Track individual IDs that are external to your PeopleSoft Enterprise Campus Solutions system.

Entering an External System ID

Access the External System ID page.



External System ID page

External System

External System Select the external system that contains the ID that you want to enter.

Values for this field are delivered with your system as translate values. You can modify these translate values.

External System Details

External System ID Enter the external system ID for the individual. If the individual has several IDs in this external system, you can add them here.

Entering Residency Data

This section provides an overview of residency data and discusses how to:

- Enter official residency data.
- Entering official residency location details.
- Enter self-reported residency data.
- Enter residency appeal data.

Understanding Residency Data

Using the Resident Table page, set up codes to represent the residency rules of your institution. For example, your institution might require residency codes for residency that is in state, out of state, in district, out of district, and so on. On the Residency Exception Table page, set up exceptions to the residency rules. For example, some individuals might be exempt from nonresidency requirements because they are in the military. Exceptions are especially useful in tuition calculation.

After you set up residency codes and residency exception codes, use the Official Residency 1 and 2 pages to record residency information that your institution has verified, including the individual's state residency or out-of-state residency for a specific term. You can enter unofficial, self-reported residency information on the Residency Self-Report page.

When an individual appeals residency information, you can enter the information on the Residency Appeal page, including the date and status of the appeal and comments about the appeal.

Prerequisites

Before entering residency data, define residency rules.

See Also

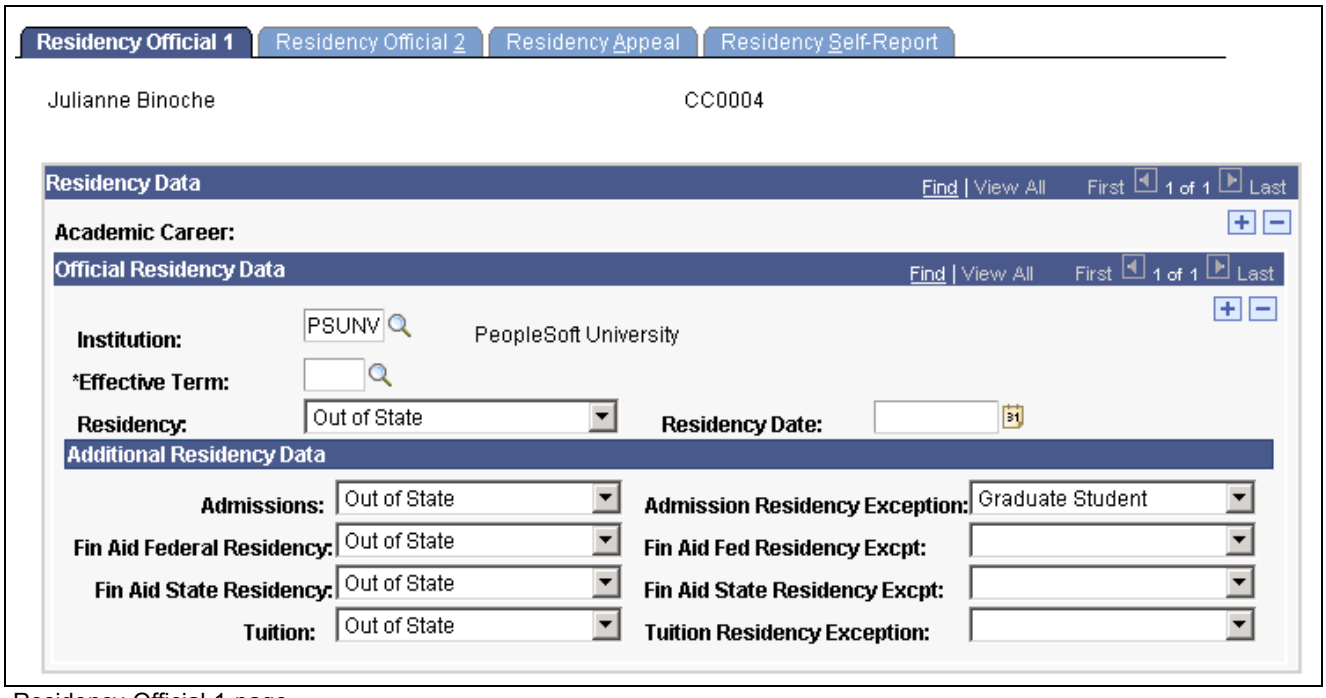
Chapter 9, "Setting Up Identification Data," Setting Up Residency Rules, page 105

Pages Used to Enter Residency Data

Page Name	Object Name	Navigation	Usage
Residency Official 1	RESID_OFFICIAL1	Campus Community, Personal Information, Identification, Residency Data, Residency Official 1	Enter official residency data for an individual.
Residency Official 2	RESID_OFFICIAL2	Campus Community, Personal Information, Identification, Residency Data, Residency Official 2	Enter additional official residency data for an individual.
Residency Appeal	RESIDENCY_APPEAL	Campus Community, Personal Information, Identification, Residency Data, Residency Appeal	Record residency appeal information.
Residency Self-Report	RESIDENCY_SELF	Campus Community, Personal Information, Identification, Residency Data, Residency Self-Report	Enter unofficial, unverified residency information that an individual reports to your institution.

Entering Official Residency Data

Access the Residency Official 1 page.



Residency Official 1 page

Official Residency Data

Effective Term Enter the term for which the residency data is effective for the individual.

Residency Select the rule (from the Residency Table page) that describes the individual's residency status.

Residency Date Enter the date that the individual established or reported the residency.

Additional Residency Data

Admissions Specify the type of residency that qualifies the individual for admission to the specified institution.

Fin Aid Federal Residency Specify the type of residency that qualifies the individual to receive financial aid from the federal government.

Fin Aid State Residency Specify the type of residency that qualifies the individual to receive financial aid from the state.

Tuition Specify the type of residency that qualifies the individual for tuition assistance.

Admission Residency Exception Specify the exception from your institution's residency rule for admissions (from the Residency Exception Table page) that applies to the individual.

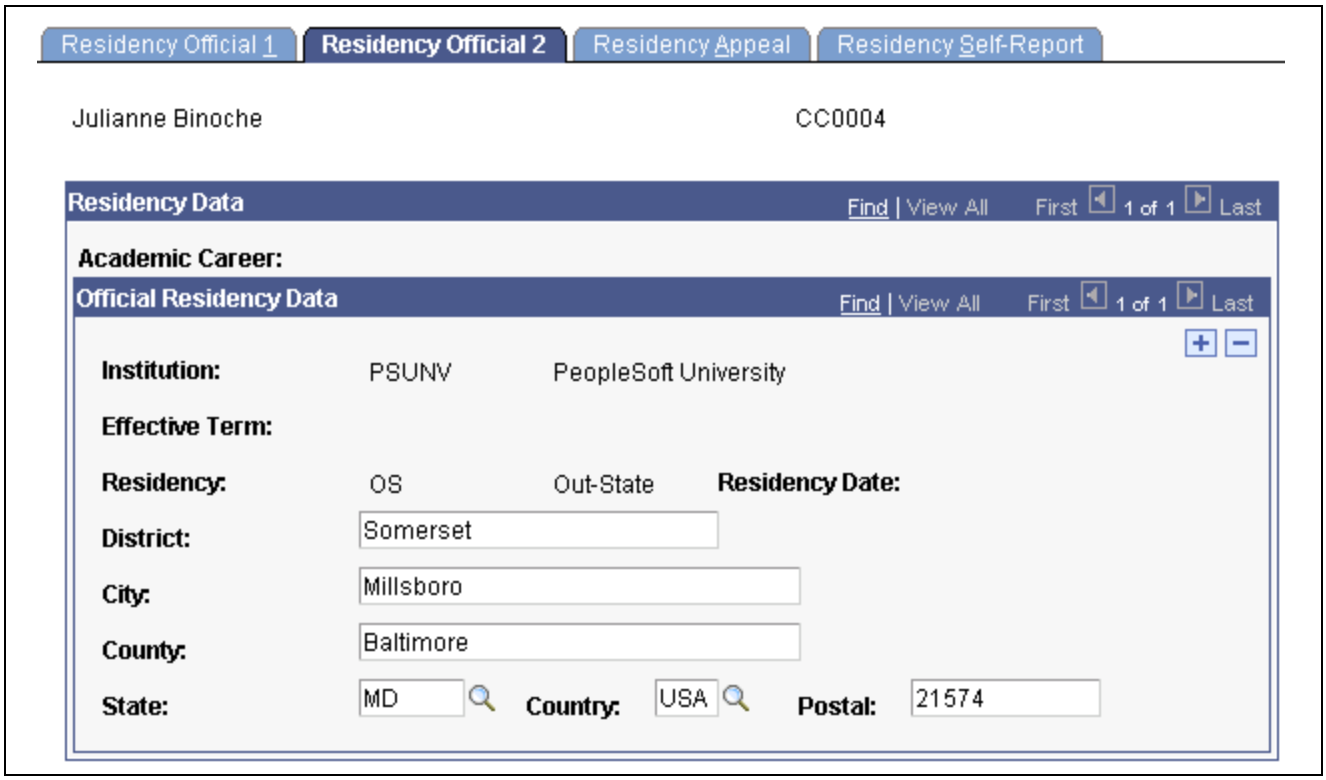
Fin Aid Fed Residency Exception Specify the exception from the federal residency rule for financial aid (from the Residency Exception Table page) that applies to the individual.

Fin Aid St Residency Exception Specify the exception from the state residency rule for financial aid (from the Residency Exception Table page) that applies to the individual.

Tuition Residency Exception Specify the exception from your institution's residency rule for tuition (from the Residency Exception Table page) that applies to the individual.

Entering Official Residency Location Details

Access the Residency Official 2 page

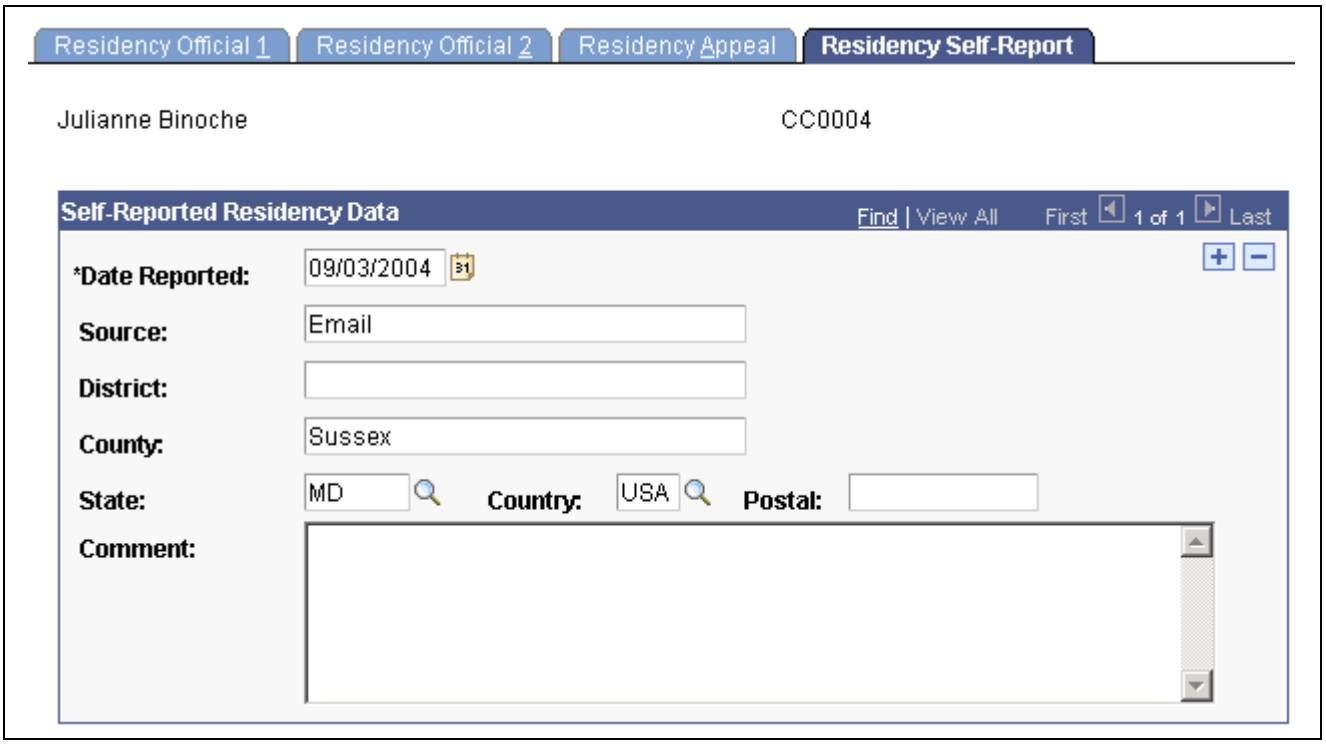


Residency Official 2 page

Enter location details of the residency data for this individual.

Entering Self-Reported Residency Data

Access the Residency Self-Report page.



Residency Self-Report page

Self-Reported Residency Data

Date Reported Enter the date on which this residency information is reported to your institution. The default date is the system's current date. You can override the default date.

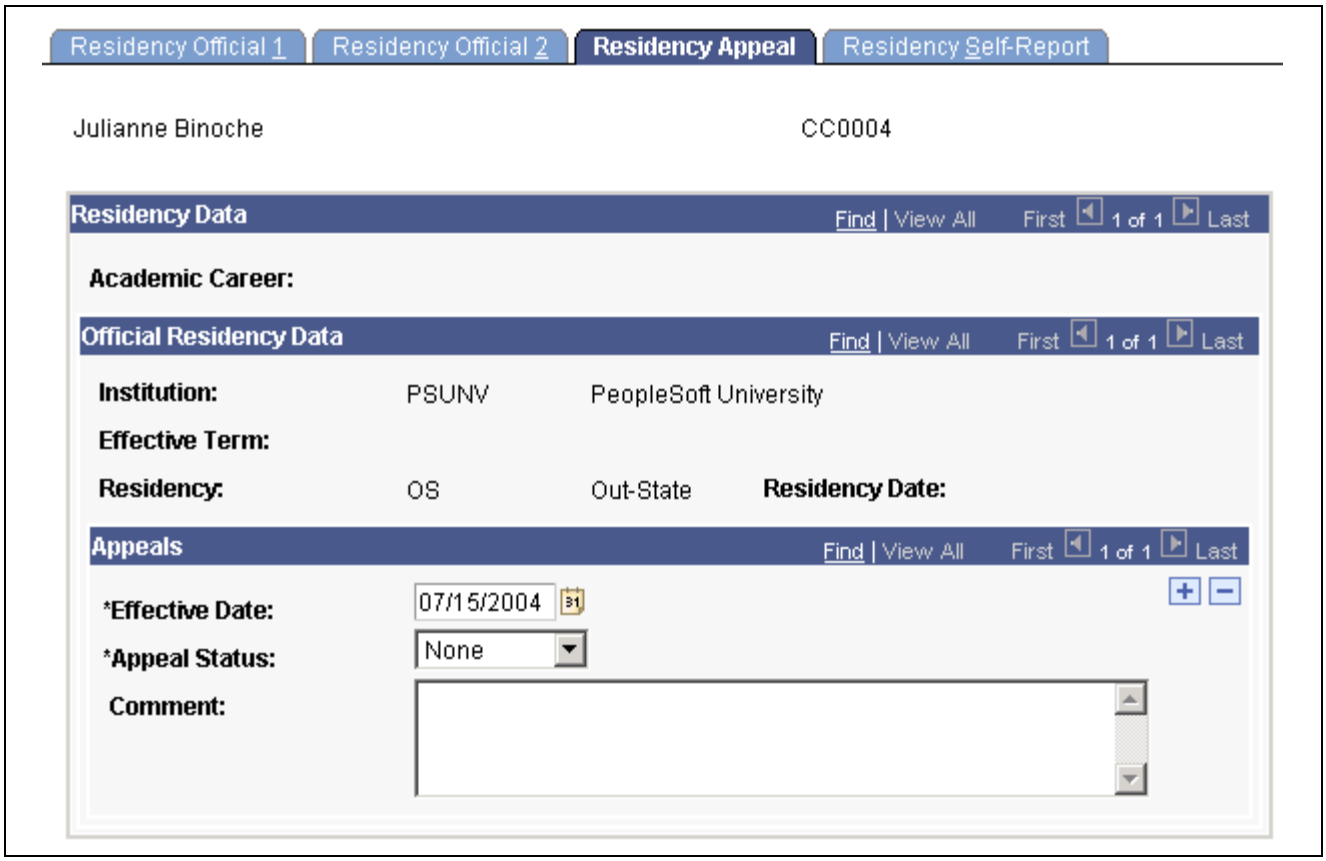
Source Enter a description of the source of this residency information. This can be an individual's name, the method of reporting (such as letter, email, telephone conversation, and so on), or the title of a document that you have chosen to use.

District, County, State, Country, Postal Enter location details for this residency.

Comment Enter comments to further describe this residency information or further identify the source of the information.

Entering Residency Appeal Data

Access the Residency Appeal page.



Residency Appeal page

Appeals

Effective Date Enter the effective date of the status of this appeal. The default effective date is the system's current date. You can override this date.

Appeal Status Select the current status of this appeal. Values are:

Accepted

Denied

In Progress

None

Suspended

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment Enter comments to further describe or identify the nature of this appeal.

Entering Photographs

This section lists prerequisites and discusses how to enter a photograph into your database.

Prerequisites

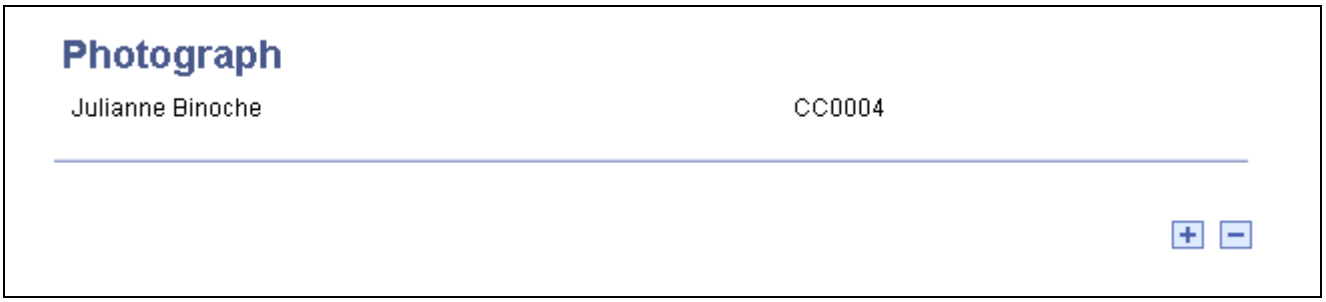
Before you can enter a photograph into your database, you must scan or digitally load the photo onto your computer and save it in *jpeg* format. Consult your platform manufacturer's documentation for information about imaging for the particular database platform that you are using.

Page Used to Enter Photographs

Page Name	Object Name	Navigation	Usage
Photograph	PHOTO_PERS	Campus Community, Personal Information, Identification, Photo	Enter a photograph of an individual into your system.

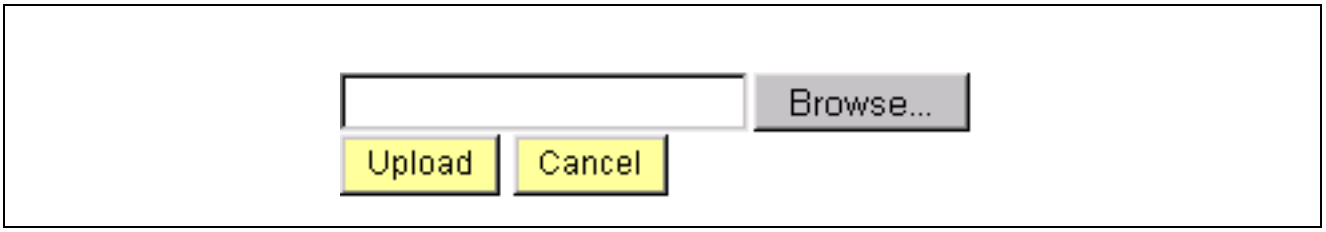
Entering a Photograph

Access the Photograph page.



Photograph page

To insert an image, click the plus button to add a row on the Photo page. The following page appears.



Uploading a photo to the Photo page

Browse to, or enter the path to the .jpg image of the individual on your computer and click Upload. After the system uploads the photo, save the page.

Entering Personal Identification Numbers

This section discusses how to enter a personal identification number into your database.

Page Used to Enter Personal Identification Numbers

Page Name	Object Name	Navigation	Usage
Personal Identification Number	PIN	Campus Community, Personal Information, Identification, PIN	Maintain an individual's personal identification number in your system.

Entering a PIN

Access the Personal Identification Number page.

Personal Identification Number page

PIN Enter the PIN for this individual.

PINs can be up to nine alphanumeric characters. To ensure confidentiality, the characters appear as asterisks as you enter them.

CHAPTER 25

Managing Participation Data

This chapter provides an overview of participation data and discusses how to:

- Enter honors and awards data.
- Enter licenses and certificates data.
- Enter membership data.
- Enter publications data.
- Enter athletic participation data.
- Enter extracurricular activities data.

Understanding Participation Data

You can enter information in your database to indicate the types of accomplishments achieved by individuals at your institution, as well as their association memberships. You can enter data about their athletic participation, extracurricular activities, the licenses and certificates that they hold, the honors and awards that they receive, and the articles or books that they have published.

You can use the codes in your system to identify athletes at your institution and track their athletic participation and eligibility. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events at your institution.

You can also enter data about the books and articles that individuals at your institution have published.

Note. PeopleSoft Enterprise Campus Self Service, which is licensed separately, provides self-service components for participation data.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Self-Service Campus Personal Information," Using Self-Service Participation Data.

Prerequisites

Before entering participation data, you must set up codes and tables to use.

See Chapter 11, "Setting Up Participation Data," page 111.

Entering Honors and Awards Data

You can enter data about internal and external honors and awards received by individuals at your institution. You can track the external honors and awards of interest to your institution. You can include internal awards on transcripts and for setting up graduation.

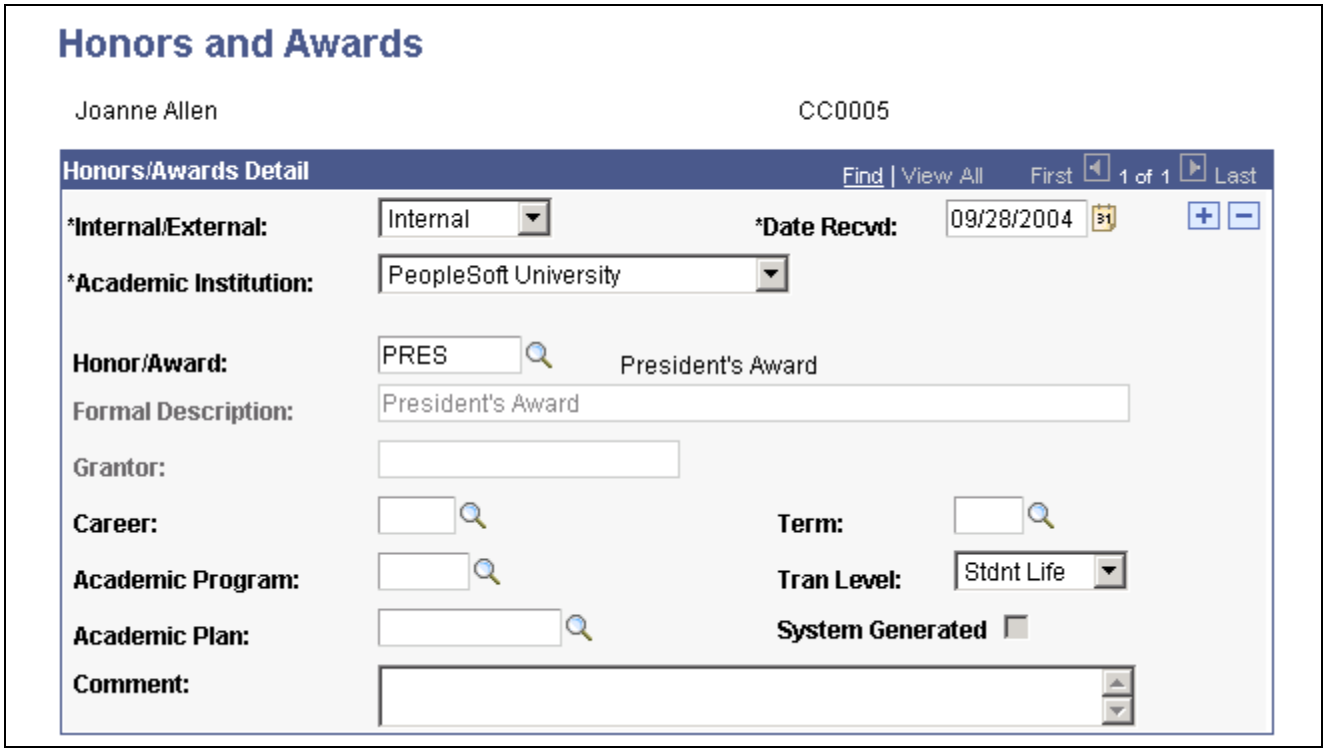
See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Tracking Student Data," Tracking Honors and Awards.

Page Used to Enter Honors and Awards Data

Page Name	Object Name	Navigation	Usage
Honors and Awards	HONORS_AWARDS_CS	Campus Community, Personal Information, Accomplishments, Honors and Awards	Enter internal and external honors and awards received by individuals at your institution.

Entering an Honor or Award

Access the Honors and Awards page.



Honors and Awards page

Honors/Awards Detail

Internal/External Select the type of honor or award that the individual received. Values are:

Internal

External

Honor/Award Select the honor or award that was received. The available honors and awards are from the Honors/Awards Table page.

Career, Academic Program, Academic Plan, Term, and **Tran Level**(transcript level) These fields appear when you select *Internal*. The transcript level that was set on the Honors/Awards Table page for the selected honor or award appears as the default value in the Tran Level field. You can override it to select a different transcript level on which to include this honor or award.

Enter values in the other fields as required by your institution for internal honors and awards.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Preparing to Track Student Data," Setting Up Honors and Awards.

Entering Licenses and Certificates Data

You can enter data about the credentials and certifications earned by individuals at your institution. You can also indicate whether the license or certificate requires renewal, and if so, when.

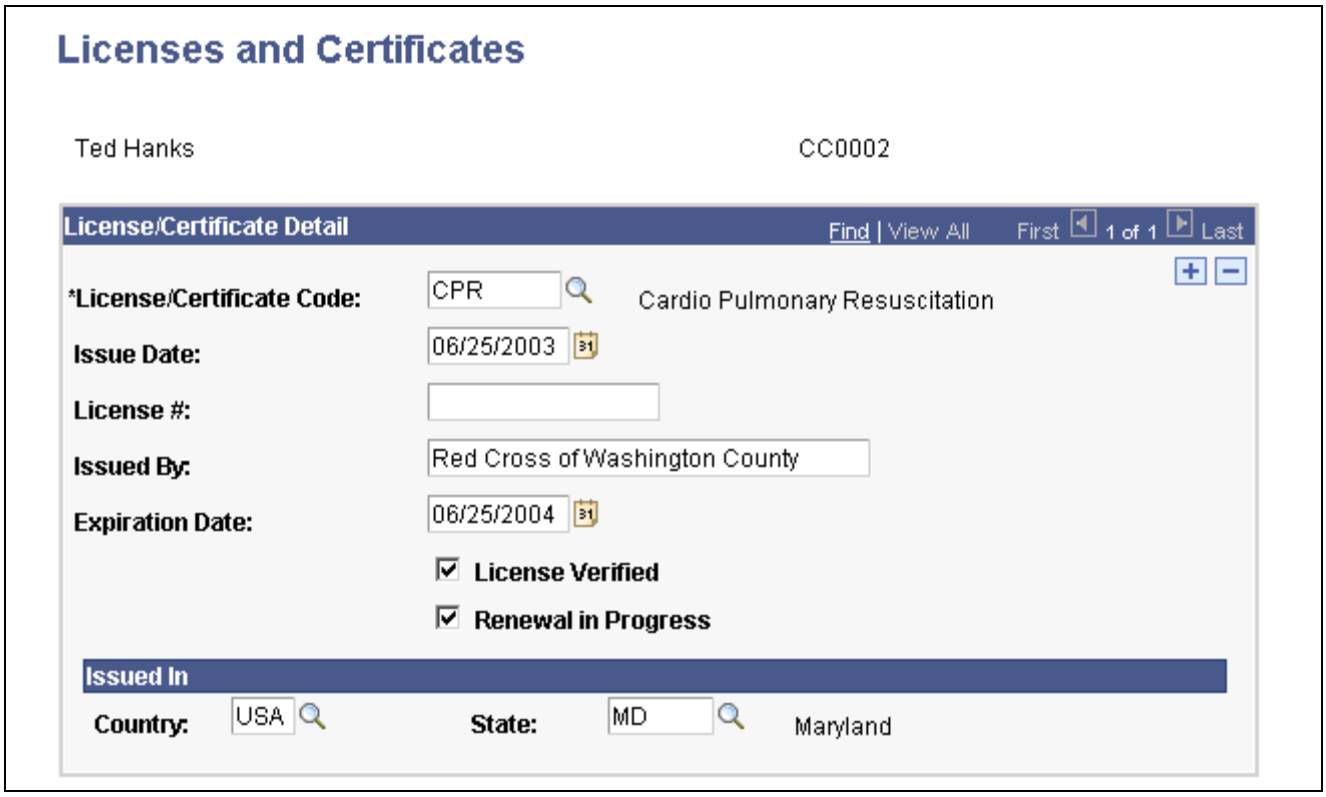
This section discusses how to enter license and certificate data.

Page Used to Enter License and Certificates Data

Page Name	Object Name	Navigation	Usage
Licenses and Certificates	SCC_LICENSE_CERT	Campus Community, Personal Information, Participation Data, Accomplishments, Licenses and Certificates	Enter license and certificate data to track the permits, licenses, and certifications held by an individual.

Entering Licenses and Certificates Data

Access the Licenses and Certificates page.



Licenses and Certificates page

License/Certificate Detail

License/Certificate Code Select the code for the license or certificate to track for the individual.

Issue Date Enter the date on which the license or certificate was officially issued.

License # Enter the license number or other unique identification number assigned to the specific license or certificate by the issuing agent.

Issued By Enter the name of the agency or authority that issued the license or certificate.

Expiration Date Enter the date on which the license or certificate is scheduled to expire.

License Verified Select to indicate that your institution has verified that this individual holds this license or certificate.

Renewal in Progress Select to indicate that the individual is in the process of renewing this license or certificate.

Issued In

Country Specify the country in which the license or certificate was issued.

State Specify the state or province in which the license or certificate was issued.

Entering Memberships Data

You can select from the organizations in your database to indicate an individual's association with that organization. If the individual belongs to an organization that is not in your database, you might want to add the organization on the Membership Table page so that you can track the individuals at your institution who belong to it.

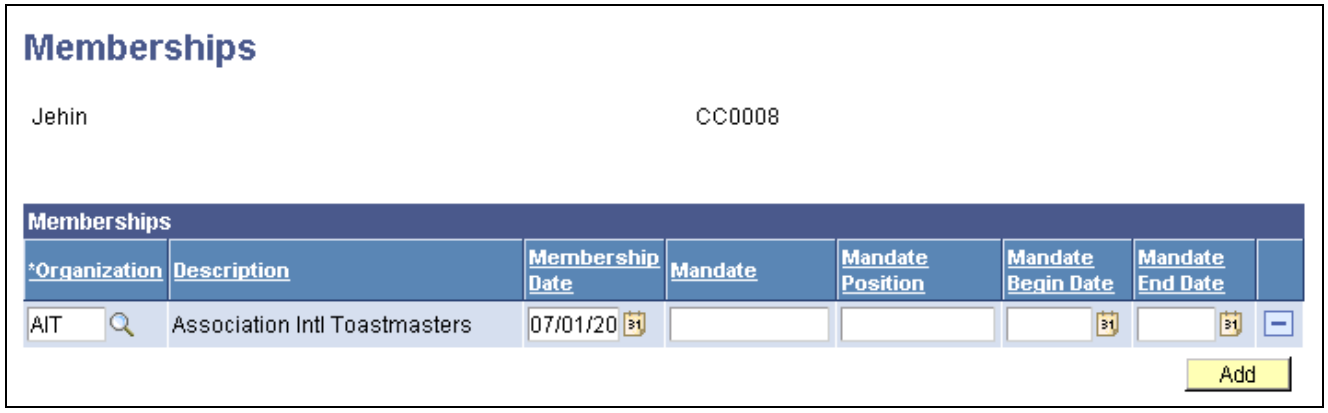
This section discusses how to enter memberships data.

Page Used to Enter Memberships Data

Page Name	Object Name	Navigation	Usage
Memberships	SCC_MEMBERSHIPS	Campus Community, Personal Information, Participation Data, Accomplishments, Memberships	Enter memberships data to identify the organizations of which an individual is a member.

Entering Membership Data

Access the Memberships Page.



Memberships page

Organization and **Description** — Select the code for the organization of which this individual is a member.

Membership Date — Enter the date on which the individual's membership began.

Mandate, Mandate Position, Mandate Begin Date, and **Mandate End Date** — Enter data to describe the organization's mandate or purpose of membership.

Entering Publications Data

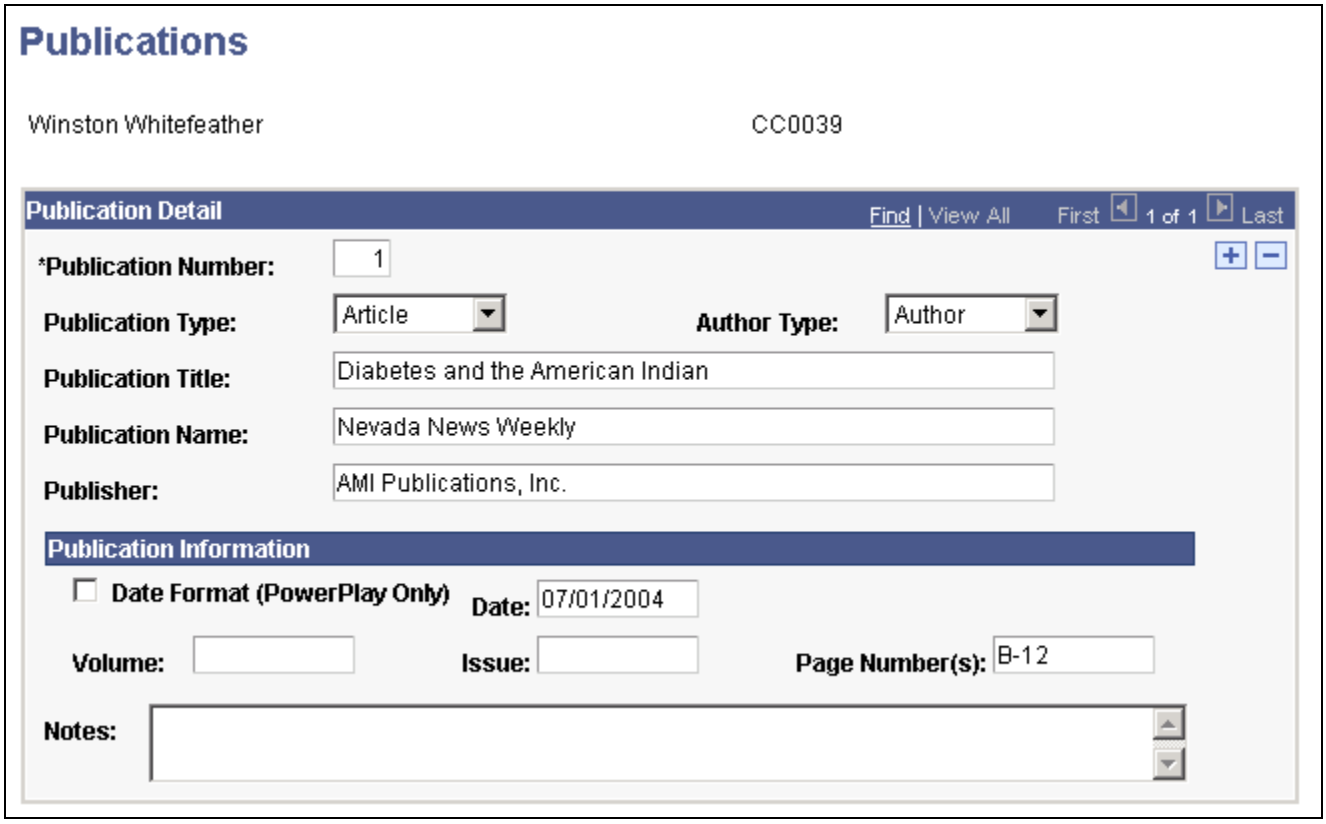
This section discusses how to enter publications data.

Page Used to Enter Publications Data

Page Name	Object Name	Navigation	Usage
Publications	LS_PUBLICATIONS	Campus Community, Personal Information, Participation Data, Accomplishments, Publications	Enter publications data for an individual.

Entering Publications Data

Access the Publications page



Publications page

Publication Detail

Publication Number The number of this publication in the list of publications for this individual.

The system enters the next sequential number for each publication that you add. You can override the number to reorder the list of publications.

Publication Type Specify the type of publication , such as article, book, presentation, record, thesis, or video.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Author Type Specify the type of this individual's authorship participation in the publication, such as author, co-author, or editor.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Publication Title Enter the title of the publication.

Publication Name Enter the name of the magazine, journal, book, or other, in which the publication appeared.

Publisher Enter the name of the publisher of the magazine, journal, book, or other medium in which the publication appeared.

Publication Information

Date Format For PowerPlay Select to indicate whether the value in the Date field must be selected from the calendar feature or entered in a valid date format.

If you do not select this check box, the value in the Date field can be any value or format of up to 10 characters.

Date Enter the date of the publication.

Volume Enter the volume, if any, of the magazine, journal, book, or other medium in which the publication appeared.

Issue Enter the issue, if any, of the magazine, journal, book, or other medium in which the publication appeared.

Page Number(s) Enter the page numbers, if any, of the magazine, journal, book, or other medium in which the publication appeared.

Notes Enter notes or comments to further identify or describe the publication by this individual.

Entering Athletic Participation Data

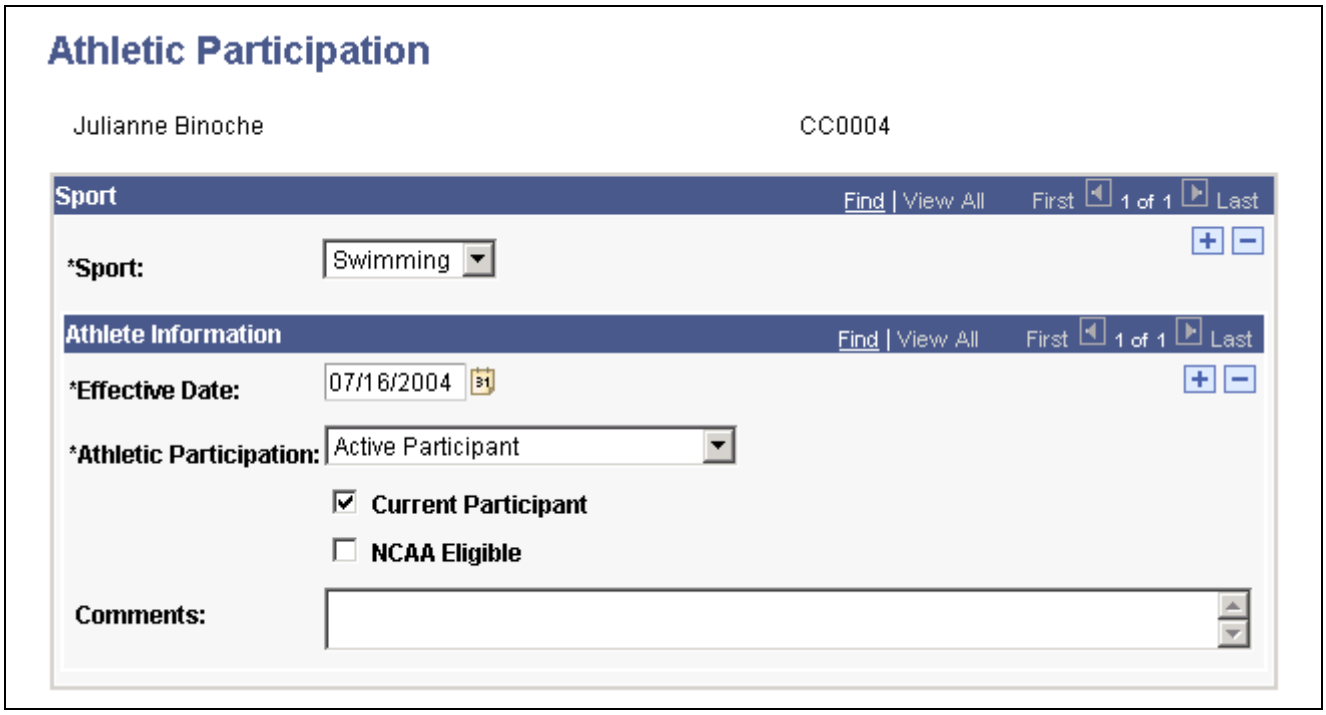
This section discusses how to enter athletic participation data.

Page Used to Enter Athletic Participation Data

Page Name	Object Name	Navigation	Usage
Athletic Participation	ATHLETES	Campus Community, Personal Information, Participation Data, Athletic Participation	Enter athletic participation data to help track an individual's participation at your institution.

Entering Athletic Participation Data

Access the Athletic Participation page.



Athletic Participation page

Sport

Sport Select the sport in which this individual participates.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Athlete Information

Athletic Participation Indicate the level or status of the individual's participation in the specified sport, such as active participant, manager, not recruited, or recruited.

Current Participant Select to indicate that this individual currently participates in this sport.

NCAA Eligible Select to indicate that the individual is eligible to participate on an NCAA (National Collegiate Athletic Association) team for this sport.

Comments Enter comments to further identify or describe the individual's level or status of participation in the specified sport.

Entering Extracurricular Activities Data

You can use the codes in your system to identify extracurricular activities and track participation in them. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events.

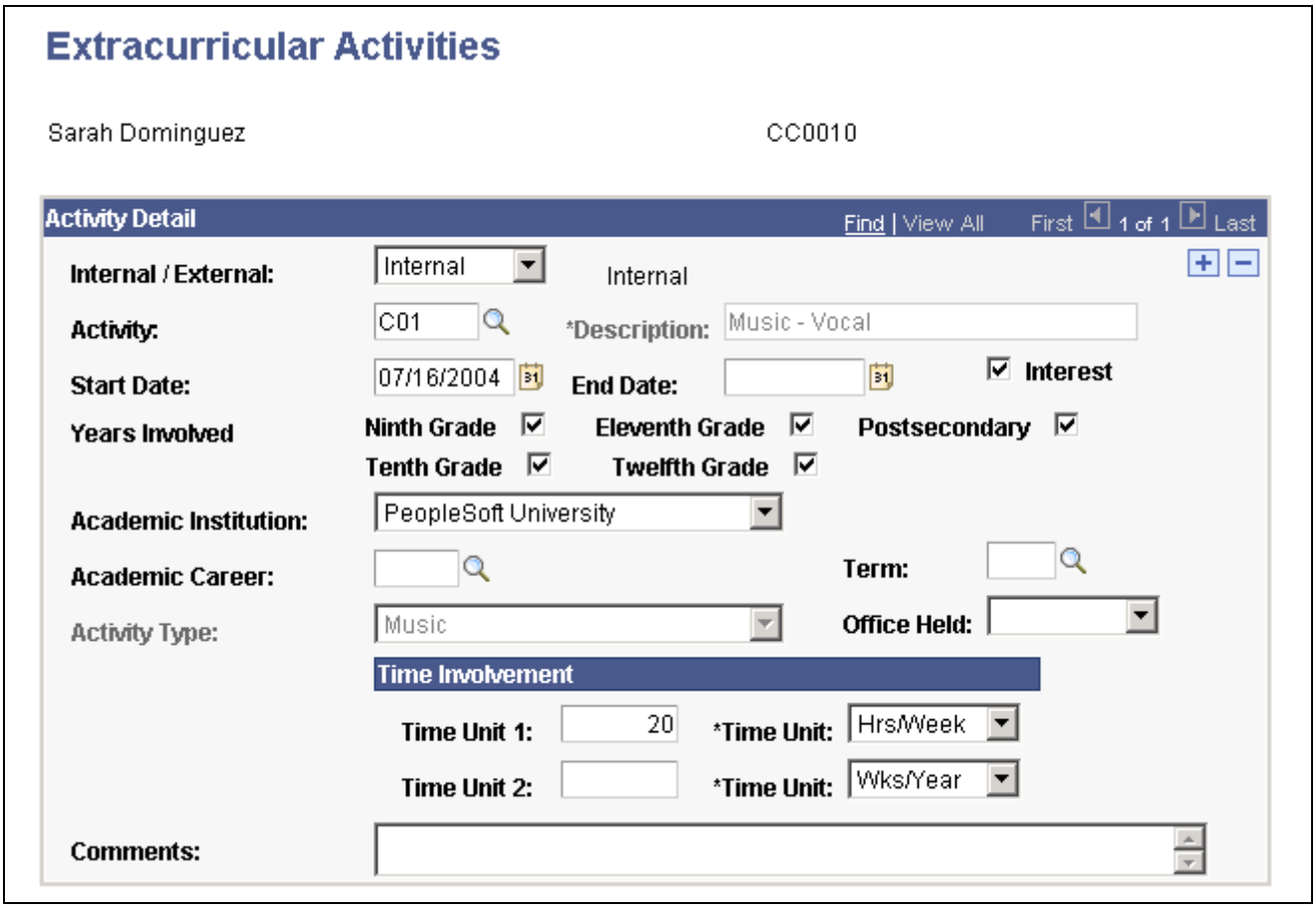
This section discusses how to enter extracurricular activities data.

Page Used to Enter Extracurricular Activities Data

Page Name	Object Name	Navigation	Usage
Extracurricular Activities	LS_EXTRA_ACTVTY	Campus Community, Personal Information, Participation Data, Extracurricular Activities	Enter extracurricular activities data to track internal or external student activities for an individual.

Entering Extracurricular Activities Data

Access the Extracurricular Activities page.



Extracurricular Activities page

Internal/External Specify whether the activity in which the individual participates, is within or outside of your institution.

Activity Select the activity code, from the Extracurricular Activities Table page, which represents the activity in which the individual participates.

Description The system displays the description associated with the specific activity code on the Extracurricular Activities Table page.

Note. You can manually enter an activity description without selecting a code. However, to be sure that the activity will be included in FERPA and other processes that depend on the codes, you should consider setting up the activity on the Extracurricular Activities Table page.

Start Date Enter the date on which the individual's participation in this activity is scheduled to begin. The default start date is the system's current date. You can override this date.

End Date Enter the date on which the individual's participation in this activity is scheduled to end.

Interest Select to indicate that the individual expresses an interest in participating in this activity while at your institution.

Years Involved Select the appropriate check boxes to indicate the years during which the individual participated in this type of activity.

Academic Institution The system displays the academic institution of the student, unless the student has more than one, in which case you must select the relevant institution.

Academic Career The system displays the academic career of the student, unless the student has more than one, in which case you must select the relevant career.

Term Specify the term during which this individual is scheduled to participate in this activity.

Activity Type The system displays the activity type associated with the specified activity code on the Extracurricular Activities Table page.

Office Held Specify the office, if any, that this individual holds in this activity, such as captain, EIC, president, treasurer, or vice president.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Time Unit 1 and **Time Unit 2** Enter the amount of time that the individual devotes to this activity. Enter the number in the first field and select a time period in the second field. Values for the second field are:

Days/Month

Hrs/Week

Wks/Year

The default value is *Hrs/Week*.

If you specify the number of hours per week in theTime Unit 1 field, you should also specify the number of weeks per year that the individual devotes to the activity in the Time Unit 2 field.

Comments Enter comments to further identify or describe the individual's participation in this activity.

CHAPTER 26

Managing FERPA Privacy Control

This chapter provides an overview of managing data privacy to comply with the U.S. Family Educational Rights and Privacy Act (FERPA) requirements or other privacy requirements that your institution might have and discusses how to:

- Apply or release FERPA restrictions.
- Determine releasable information.

Understanding FERPA

Under FERPA regulations, institutions can release directory information about a student, provided that the student has reasonable opportunity to prohibit, in writing, the disclosure of such information.

FERPA regulations define which items qualify as directory information; however, each institution must identify and make known which of those items it plans to publish or share as directory information. PeopleSoft delivers examples of typical directory information in the FERPA_VW control tables. You must configure these examples to reflect your institution's directory information. Even though FERPA is named after a U.S. regulation, the feature is flexible and can be used to define privacy settings for any personal sensitive data.

Note. Not all information defined as potential FERPA directory information is controlled by the delivered FERPA functionality. You may need to expand or modify the delivered records and views if other information about students is subject to FERPA regulations or should be treated as confidential according to your institution's policy. For more information about your institution's or FERPA's definition of directory information, contact your institution's registrar's office. Other resources on FERPA directory information and other regulations include: The Family Policy Compliance Office, U.S. Department of Education, and the American Association of Collegiate Registrars and Admissions Officers (AACRAO).

Under FERPA, students can prohibit the release of directory data about themselves. With PeopleSoft FERPA functionality, students can restrict data, but they can also give you permission to release some or all of that restricted data for inclusion in specific internal publications.

(FERPA privacy shade)

When you apply FERPA control to restrict data for a student, the system attaches a FERPA window shade privacy button to that individual's records in your database.

Click the FERPA privacy button on a page about that individual to quickly determine the information that is legally releasable to others at your institution or to third-party vendors about that individual. You can also navigate directly to the FERPA Display inquiry pages for each type of information (biographical data, addresses, activities, and so on) to determine the same information.

Prerequisites

Before you can apply and manage FERPA control, you must establish FERPA control fields. Before you can enable students to identify publications for which they release FERPA restrictions, you must set up your institution's publications.

See Also

Chapter 8, "Setting Up FERPA Privacy Control," page 95

Applying FERPA Control

When students exercise rights under FERPA, they identify information that they do not want your institution to release about themselves. You must apply FERPA control to identify this information and prohibit the release of restricted information across your institution. Students have the option of permitting your institution to release any of the restricted information to specific internal publications.

You can use the FERPA page or the FERPA Quick Entry page to apply FERPA control from the administrative side or, if your institution has purchased PeopleSoft Enterprise Campus Self Service, you can make students responsible for applying their own FERPA control over the internet from the FERPA self-service page.

This section discusses how to:

- Apply or release FERPA restrictions.
- Use the FERPA Quick Entry page.
- Specify or review publications to which restricted data may be released.

Note. If your institution has licensed and implemented PeopleSoft Enterprise Campus Self Service, students can use the FERPA self-service page to apply their own FERPA restrictions and to identify which restricted information your institution can include in specific internal publications.

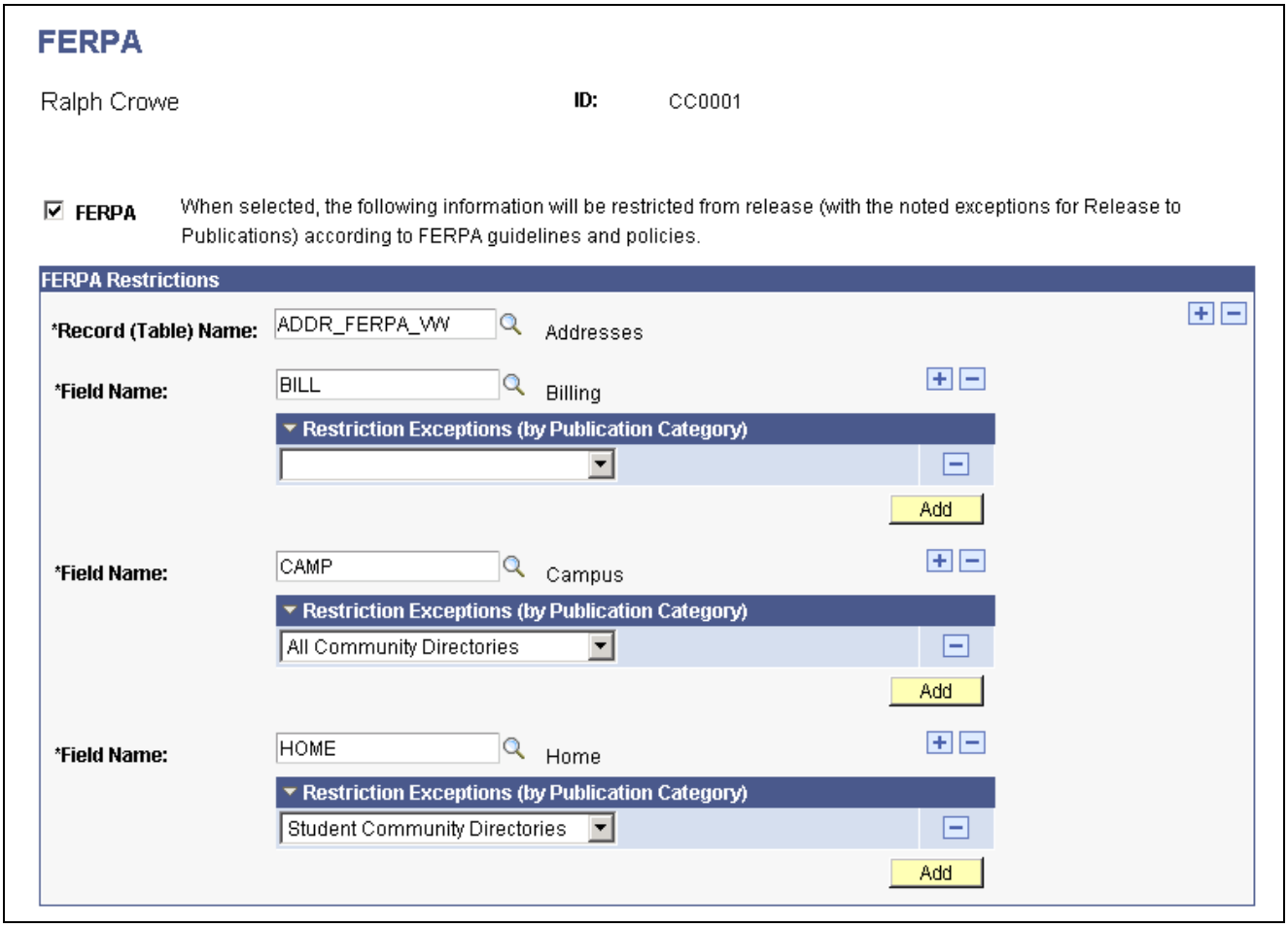
See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Self-Service Campus Personal Information," Understanding Self-Service Addresses, Names, Phones, and Demographic Data.

Pages Used to Apply FERPA Privacy Controls

Page Name	Object Name	Navigation	Usage
FERPA	FERPA	Campus Community, Personal Information, Biographical, Person FERPA, FERPA	Apply or release FERPA restrictions to selected data for an individual.
FERPA Quick Entry	FERPA_ADMIN_QENTRY	Campus Community, Personal Information, Biographical, Person FERPA, FERPA Quick Entry	Apply or release FERPA restrictions to selected data for an individual.
Release To Publication	INST_PUB_CATG_SEC	Click the Release To Publication link that appears on the FERPA Quick Entry page when an item is selected on the FERPA Quick Entry page.	Specify or review publications to which restricted data may be released.

Applying or Releasing FERPA Restrictions

Access the FERPA page (or the FERPA Quick Entry) page.



FERPA page

FERPA Select this check box to indicate that the student has, in accordance with FERPA, instructed your institution not to release the information about them, and to display the FERPA Restrictions area at the bottom of the page, where you can select the record and field to restrict.

FERPA Restrictions

Record (Table) Name Enter the name of the FERPA_VW record, from the FERPA Control Page, that contains the type of information the student is restricting.

Field Name Enter the name of the controlled field on the FERPA_VW record that contains the specific information the student is restricting. The values displayed in the prompt are controlled by the FERPA Control setup page.

Restriction Exceptions (by Publication Category) Select each of the publications, from the Publications Categories page, to which the student gives you permission to release the otherwise restricted information.

All Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution's internal community directories.

Student Community Directory: Indicates that the student gives permission to release the otherwise restricted information for inclusion in your institution's internal student directory only.

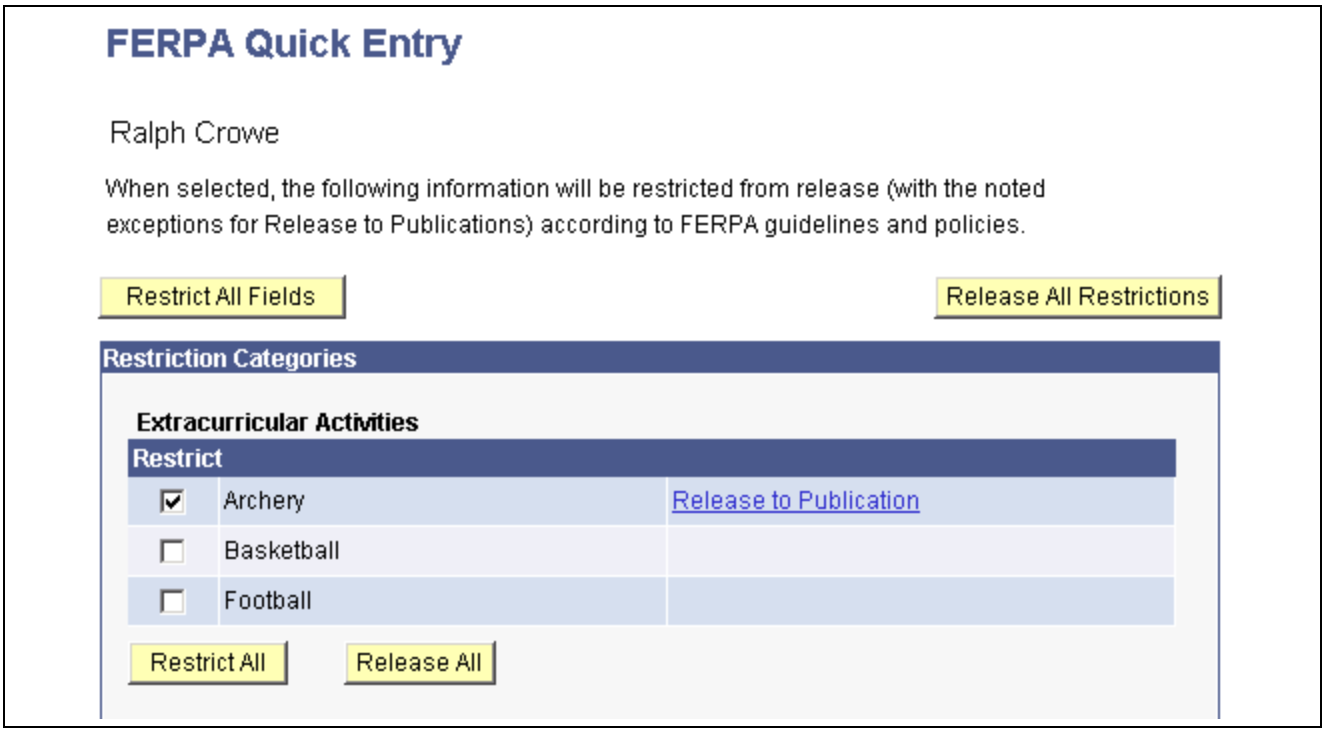
Note. Publication categories are used in PeopleSoft Enterprise Campus Self Service. You can add new categories and add publications to the delivered categories, but do *not* delete the delivered categories.

See Also

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Community Directory Search"

Using the FERPA Quick Entry

Access the FERPA Quick Entry page.



FERPA Quick Entry page (1 of 4)

FERPA Quick Entry page (2 of 4)

FERPA Quick Entry page (3 of 4)

FERPA Quick Entry page (4 of 4)

Restrict All Fields Click this check box to select the Restrict option for all fields in all categories on the entire page.

Release All Restrictions Click this button to clear the Restrict option for all fields in all categories on the entire page.

Restriction Categories

The fields that appear for each category are based on the controlled fields identified for each FERPA_VW record on the FERPA Control page.

Note. Extracurricular Activities field names do not appear because the PeopleSoft system does not deliver sample control fields on the ACTVTS_FERPA_VW record. To set control fields for activities, use the FERPA Control page.

See Chapter 8, "Setting Up FERPA Privacy Control," page 95.

Restrict Select this check box to indicate that the student prohibits the institution from releasing this information.

Release To Publication Select this link to access the Release To Publication page, where you can enter or review publications to which the restricted data may be released.

Restrict All Click this button to select the Restrict option for all fields in the category.

Release All Click this button to clear the Restrict option for all fields in this category.

Releasing FERPA Data to Publications

Access the Release To Publication page.

Release To Publication page

Publication Categories Select each publication, from the Publication Categories page, to which the student gives you permission to release this specific, otherwise restricted information.

All Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution's internal community directories.

Student Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion your institution's internal student directory only.

Note. Publication categories are used in PeopleSoft Enterprise Campus Self Service. You can add categories, and add publications to the delivered categories, but you should *not* delete the delivered categories.

See Also

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Community Directory Search"

Determining Releasable Information

This section provides an overview of how to determine releasable information and discusses how to:

- Determine releasable bio demo data.
- Determine releasable names data.
- Determine releasable addresses data.
- Determine releasable phone numbers data.
- Determine releasable email addresses data.
- Determine releasable activities data.

Understanding the Determination of Releasable Information

You can determine releasable information about an individual two ways:

- You can click the FERPA (privacy shade) button on a page about an individual to display the Releasable FERPA Directory Information page.
- You can navigate directly to the FERPA Display pages from the Inquiry menu to review all releasable information about an individual.

Note. Field names appear on the Releasable FERPA Directory Information page and on any of the Review FERPA Display pages only if that type of data is releasable. If a field is releasable but no data exists for it, the field name appears but with no field value. For example, if the individual's birth location is releasable but data for it is not in the system, the field name Birth Location appears on the page, but the field value box beside it is empty.

Pages Used to Determine Releasable Information

Page Name	Object Name	Navigation	Usage
Releasable FERPA Directory Information	FERPA_DISPLAY1_SP	Click the FERPA (privacy shade) button from most pages for the individual.	Determine releasable data for an individual, including gender, marital status, and photo.
Releasable Names	FERPA_DSP_NAME_SEC	Click the Releasable Name link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable names for an individual.
Releasable Addresses	FERPA_DSP_ADDR_SEC	Click the Releasable Address link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable addresses for an individual.
Releasable Phone Numbers	FERPA_DSP_PHON_SEC	Click the Releasable Phone link, when available, on the Releasable FERPA Directory page.	Determine the releasable phone numbers for an individual.
Releasable Email Addresses	FERPA_DSP_EMAIL_SP	Click the Releasable Email link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable phone numbers for an individual.

Page Name	Object Name	Navigation	Usage
Releasable Activity Information	FERPA_DSP_ACT_SEC	Click the Releasable Activities link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable extracurricular activity information for an individual.
FERPA Bio Demo	FERPA_DISPLAY1	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, Bio Demo • Contributor Relations, Constituent Information, People, FERPA Display, Bio Demo	Determine releasable biographical data about an individual, including gender, marital status, and names.
FERPA Addresses	FERPA_DISPLAY2	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Addresses • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Addresses	Determine releasable address data for an individual.
FERPA Phones	FERPA_DISP_PHONES	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Phones • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Phones	Determine releasable phone data for an individual.
FERPA Email Address	FERPA_DISP_EMAIL	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Email Addrs • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Email Addrs	Determine releasable email data for an individual.

Page Name	Object Name	Navigation	Usage
FERPA Activities	FERPA_DISP_ACTVTS	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Activities • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Activities	Determine releasable extracurricular activity data for an individual.
FERPA Photo	FERPA_DISP_PHOTO	• Campus. Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Photo • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Photo	Determine if a photo of the individual is releasable.

Determining Releasable Biographical Data

Access the Releasable FERPA Directory Information page.

Releasable FERPA Directory Information page

Information displayed on this page is entered on the FERPA page or FERPA Quick Entry page. The Person of Interest or other designation is identified when the individual's record is first created in the database.

Note. When releasable data for the individual exists, the appropriate links (Releasable Name, Releasable Address, Releasable Phone, and so on) are available. If none of the data in a data type is releasable, the link for that data type does not appear.

Releasable Name Click this link to access the Releasable Name page, where you can view releasable names for this individual.

Releasable Address Click this link to access the Releasable Addresses page, where you can view releasable addresses for this individual.

Releasable Phone Click this link to access the Releasable Phone Numbers page, where you can view releasable phone numbers for this individual.

Releasable Email	Click this link to access the Releasable Email Addresses page, where you can view releasable email addresses for this individual.
Releasable Activities	Click this link to access the Releasable Activity Information page, where you can view releasable extracurricular activity information for this individual.

CHAPTER 27

Managing Service Indicators

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

- Assign or remove service indicators.
- Review service indicators.

See Also

Chapter 7, "Setting Up Service Indicators," page 89

Understanding Service Indicators

Use service indicators to provide or limit access to services at your institution for an individual. Service indicators can be holds to prevent an individual from receiving certain services or positive indicators to designate special services to be provided. Service indicators consist of one or more impact values that identify the types of specific services that are restricted or provided.

Examples of negative service indicators include no check cashing privileges, enrollment verification or transcript holds, and denied registration for classes. Positive service indicators might include check-cashing privileges, front-of-line service, use of the gym, and special services for disabled students.

For example, you might define a positive service impact to permit some students to receive their student identification cards a few days earlier than the rest of the student body. You might define another service impact that is negative, that prevents certain students from receiving their student identification cards at all (for example, until the student submits a past-due enrollment deposit).

After you define service impacts, you can group them to define service indicators and create service indicator codes. Next, you identify reasons for applying service indicators and create codes for those reasons. When you create service indicators and reason codes, administrative users with the appropriate security can assign service indicators to individuals. They can also remove an active service indicator from an individual's record when that service or restriction no longer applies. Automated processes can also be used to assign or remove negative service indicators.

When a service indicator is assigned to an individual, the corresponding negative or positive service indicator button appears on most pages about that individual. One button can represent one or several service indicators. Click the buttons on any of those pages to navigate to the appropriate details page on which you can determine how many and which restrictions apply.

Note. Future-dated service indicators prevent service indicator buttons from appearing until their specified effective dates.

(negative service indicator)	Appears on a page when a negative service indicator is assigned to and currently effective for the individual. Click to access the Negative Service Indicators page, on which you can view details about the service restrictions associated with each negative service indicator for the individual.
(positive service indicator)	Appears on a page when a positive service indicator is assigned to and currently effective for the individual. Click to access the Positive Service Indicators page, on which you can view details about the service privileges associated with each positive service indicator for the individual.

You can review active service indicators in several ways. You can click the service indicator buttons to review an individual's service indicators as described. You can also select the service indicators whose details you want to review for an individual or you can view a summary of all the service indicators currently assigned to an individual.

If you have licensed PeopleSoft Campus Self Service, students can also view their own active negative service indicator information on the self-service Holds page.

The system maintains an audit history that indicates who applied which service indictors to which individuals, including add, change, and delete history. Use the Service Indicator Audits page to view a history of the service indicators that a person has assigned to records in your system.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up Service Indicator Security

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Self-Service Campus Personal Information," Using Self-Service Service Indicators Data

Assigning or Removing Service Indicators

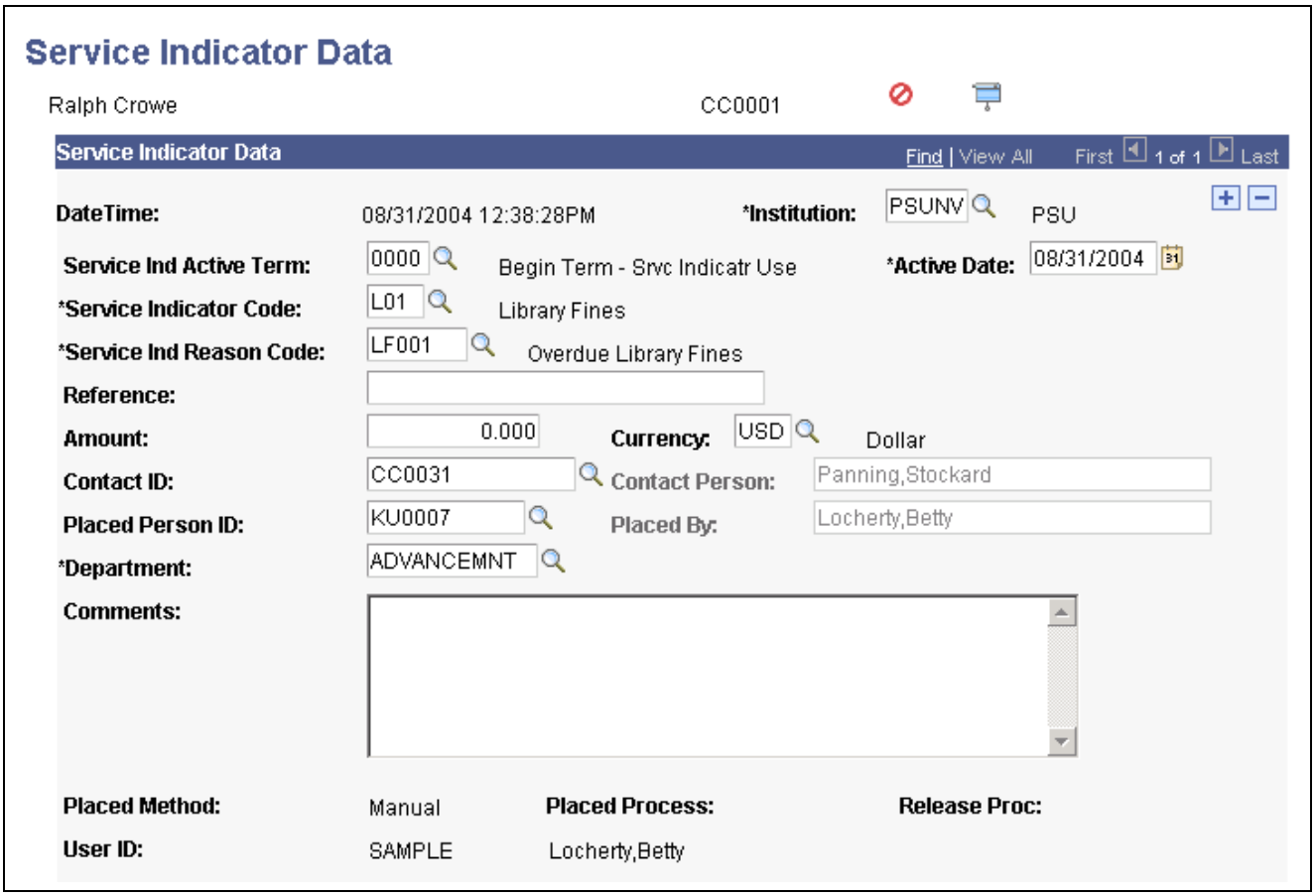
This section discusses how to assign or remove a service indicator.

Page Used to Assign or Remove Service Indicators

Page Name	Object Name	Navigation	Usage
Service Indicator Data	SRVC_IND_DATA1	• Campus Community, Service Indicators, Service Indicator Data • Contributor Relations, Constituent Information, People, Service Indicators, Service Indicator Data	Assign or remove a service indicator.

Assigning or Removing a Service Indicator

Access the Service Indicator Data page.



Service Indicator Data page

Service Indicator Data

DateTime The system displays the current day and time to indicate when the service indicator was assigned.

Institution Enter the code for the institution that is responsible for this service indicator.

Service Ind Active Term (service indicator active term) Enter the single term for which this service indicator is valid.

Note. The Service Indicator Active Term field value is filtered by the Term Category field on the Service Indicator Codes page. If no term category is entered on the Service Indicator Codes page, the system displays the default value of *0000*, which makes the service indicator valid for all terms.

Active Date Enter the date on which the service indicator becomes active for this individual.

Service Indicator Code Enter the code for the service indicator to assign to the individual.

Service Ind Reason Code (service indicator reason code) Enter the reason why you are assigning this service indicator to the individual.

Note. Only the reason codes that are associated with the specific service indicator on the Service Indicator Codes page are available.

Amount Enter the monetary amount, if any, that is required to satisfy the reason for this service indicator.

Currency	Specify the currency in which the monetary amount is expressed.
Contact ID and**Contact Person**	Enter the ID and name of the person to contact with questions about this service indicator.
Placed Person ID (and) **Placed By**	The system displays the current user ID and name to indicate the person who placed the service indicator on the individual's record. You can override this. For example, you might want to enter the ID and name of the person who requested that the service indicator be placed on the record.
Department	Enter the department that is responsible for placing the service indicator (or that requested it be placed) on this individual's record.
Comments	Enter comments to further describe or identify the service indicator reason.
Placed Method	If an automated process assigned this service indicator, *automated* appears. If you assigned the service indicator manually, *manual* appears.
Placed Process	The system displays the name of the automated process that placed this service indicator on the individual's record.
Release Proc (release process)	The system displays the name of the automated process that can release or remove this service indicator from the individual's record.
User ID and **Name**	The system displays the ID of the user who is entering or changing information on this page.

Reviewing Service Indicators

This section discusses how to:

- Review an individual's positive service indicators.
- Review an individual's negative service indicators.
- Review an individual's active service indicators.
- Audit an individual's service indicator history.

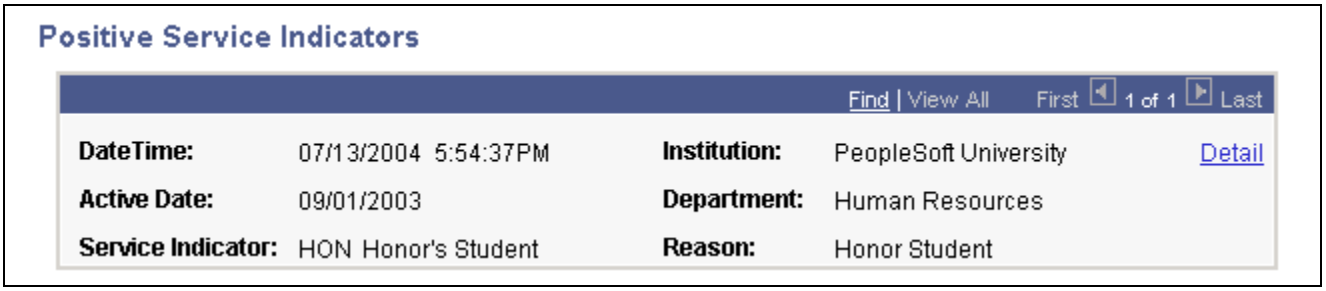
Pages Used to Review Service Indicators

Page Name	Object Name	Navigation	Usage
Positive Service Indicators	SRVC_IND_SP	Click the positive service indicator button on any page about that individual.	Review an individual's positive service indicators for an individual.
Negative Service Indicators	SRVC_IND_SP	Click the negative service indicator button on any page about that individual.	Review an individual's negative service indicators.
Service Indicator Detail	SRVC_IND_SP3	Click the Detail link on the Negative Service Indicators page or the Positive Service Indicators page.	Review the details of an individual's service indicators, including the associated service impacts.

Page Name	Object Name	Navigation	Usage
Service Indicator Detail	SRVC_IND_DETAIL	• Campus Community, Service Indicators, Active Service Indicators, Service Indicator Detail • Click the Details link on the Positive Service Indicators or Negative Service Indicators page for an individual. • Contributor Relations, Constituent Information, People, Service Indicators, Active Service Indicators, Service Indicator Detail	View the details of each active service indicator that is currently assigned to an individual.
Service Indicator Summary	SRVC_IND_SUMRY	• Campus Community, Service Indicators, Active Service Indicators, Service Indicator Summary • Click the Details link on the Positive Service Indicators or Negative Service Indicators page for an individual, and then select the Service Indicator Summary tab. • Contributor Relations, Constituent Information, People, Service Indicators, Active Service Indicators, Service Indicator Detail	View a summary of service indicators that are currently assigned to an individual.
Service Indicator Audits	SRVC_AUDIT_DATA	• Campus Community, Service Indicators, Service Indicator Audits • Contributor Relations, Constituent Information, People, Service Indicators, Service Indicator Audits	View a history of service indicators that are assigned by an individual.

Reviewing an Individual's Positive Service Indicators

Access the Positive Service Indicators page.



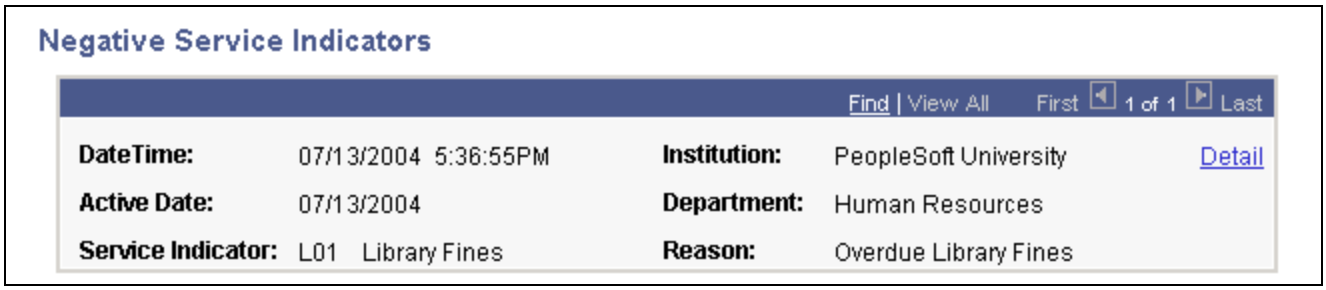
Positive Service Indicators page

Service indicators are assigned to an individual on the Service Indicators page.

Detail Click this link to access the Service Indicator Detail page, on which you can view details about service indicators and their effects.

Reviewing an Individual's Negative Service Indicators

Access the Negative Service Indicators page.



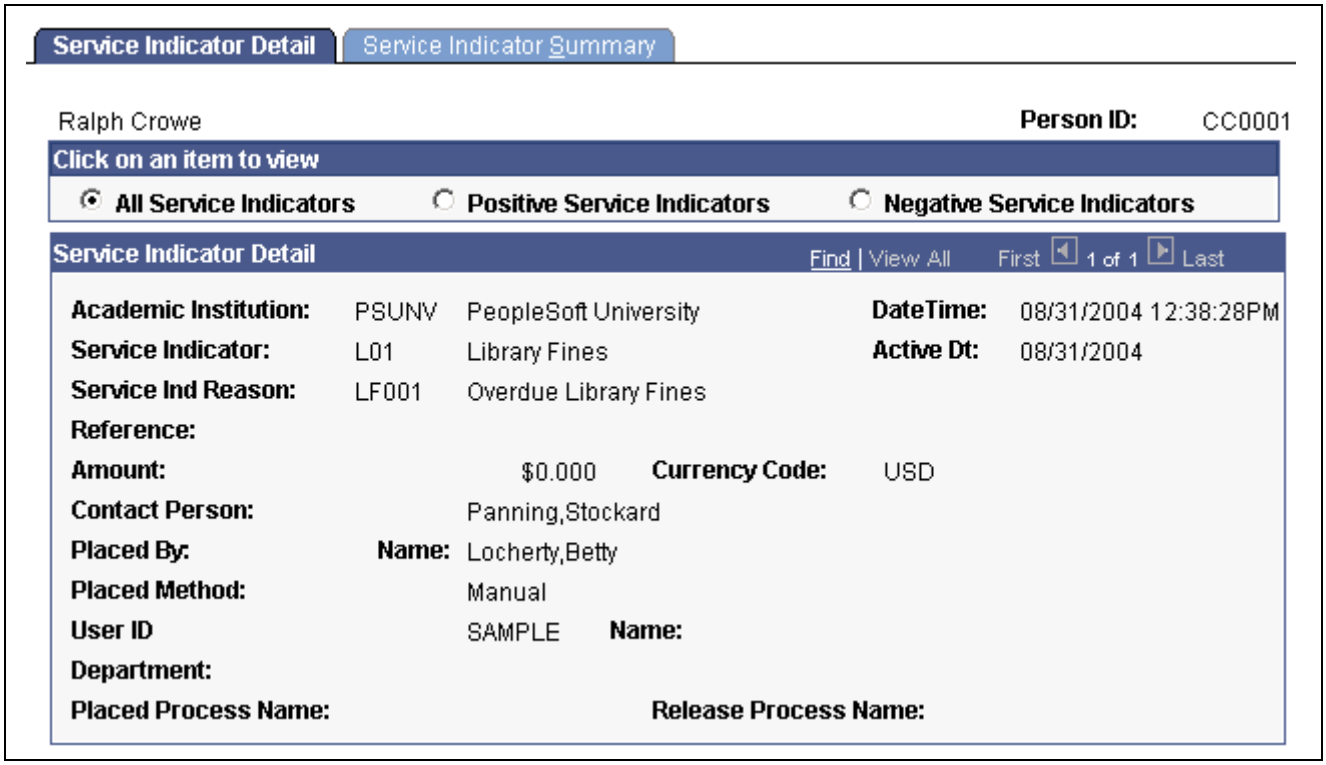
Negative Service Indicators page

Service indicators are assigned to an individual on the Service Indicators page.

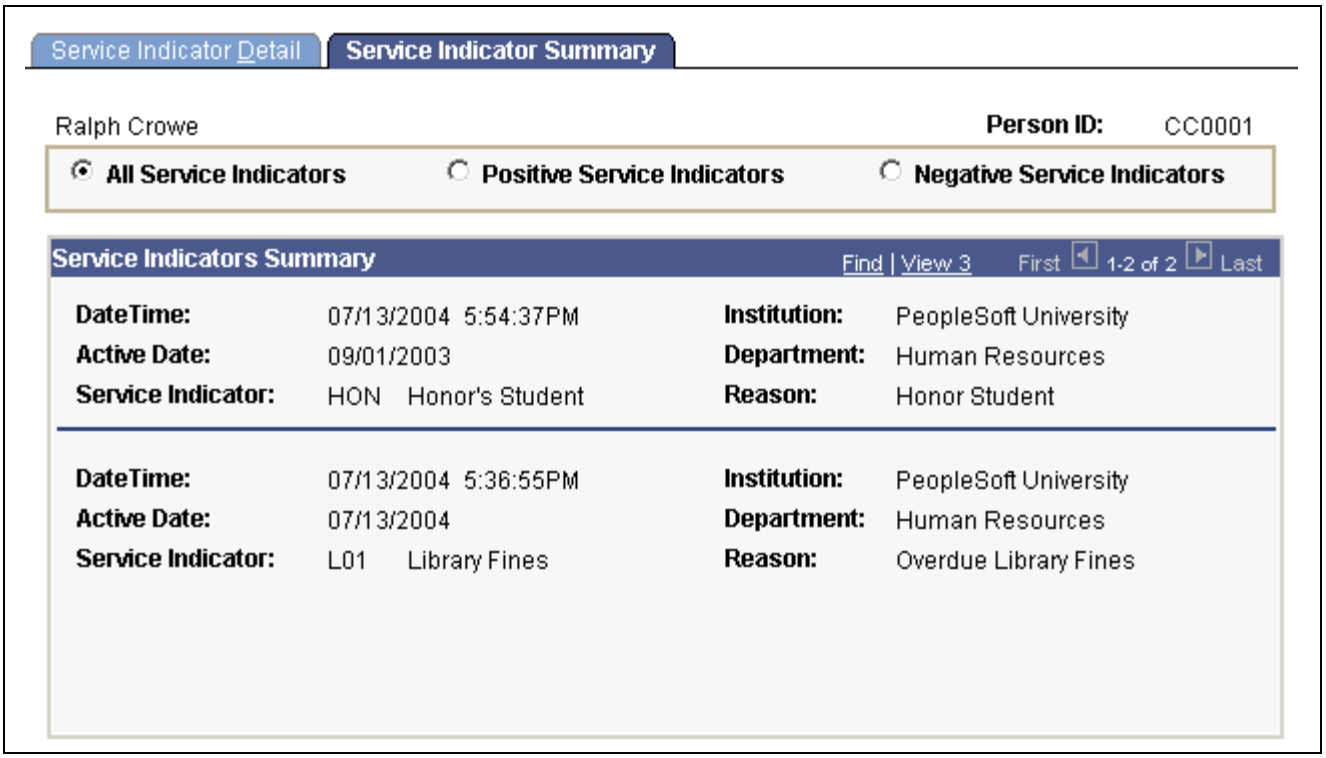
Detail Click this link to access the Service Indicator Detail page, on which you can view details about service indicators and their impacts.

Reviewing an Individual's Active Service Indicators

Access either the Service Indicator Detail page or the Service Indicator Summary page.



Service Indicator Detail page



Service Indicator Summary page

Service indicators are assigned to an individual on the Service Indicators page.

All Service Indicators, Positive Service Indicators, or **Negative Service Indicators** Select the type of service indicators to review.

Auditing an Individual's Service Indicator History

Access the Service Indicator Audits page.

Service Indicator Audits page

Active and nonactive service indicators are included in the audit history. Service indicators are assigned to an individual on the Service Indicators page.

CHAPTER 28

Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing

This chapter provides an overview of PeopleSoft Patriot Act SEVIS Solution (PASS) visa processing and discusses how to:

- Create and update student or exchange visitor and dependent data.
- Track full course load exceptions for student F and M visas.
- Create and update student data for I-20 forms (F and M visas).
- Create and update exchange visitor data for DS-2019 forms (J visas).
- Use dependent search.
- Run the SEVIS Alerts process.
- View SEVIS Alerts process data.
- View event history information.
- Generate an XML file to send to SEVIS.
- Download and view SEVIS results.
- Update the SEVIS master component.
- Extract data for external vendor systems.

See Also

Chapter 6, "Setting Up Patriot Act SEVIS Solution Visa Processing," page 59

Understanding SEVIS Visa Processing

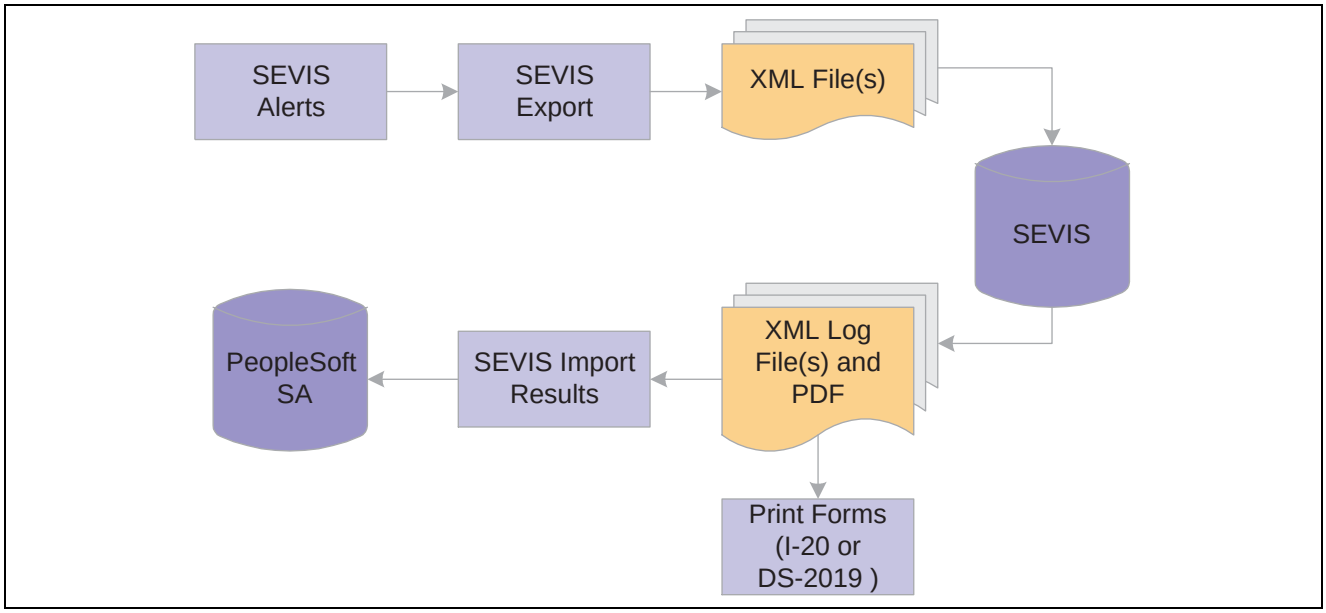
Student and Exchange Visitor Information System (SEVIS) is an internet-based system that electronically monitors and reports on international students and exchange visitors and their dependents. Then U.S. Department of Homeland Security (DHS), maintains SEVIS. It is an integral part of the DHS program to improve data collection and reporting, facilitate compliance with regulations, and automate monitoring of school and exchange programs. PeopleSoft Patriot Act SEVIS Solution (PeopleSoft PASS) is an enhancement to PeopleSoft Enterprise Campus Solutions that collects data, monitors changes, and reports student and exchange visitor changes.

PASS extracts information and sends it to SEVIS to be reported to the DHS. You can audit the information after it is extracted. Once you are satisfied that it is correct, you produce an XML file for transmission to SEVIS. The system verifies that the transmission is received, and it reports any errors. When you send changes to SEVIS, you receive an XML file back that you use to import the results of the processing. You also receive PDF files containing any new I-20 or DS-2019 forms that are requested.

Understanding the Business Process Flow for Visa Processing

In this business process flow, it is assumed that you have completed the SEVIS setup in the PeopleSoft Enterprise Campus Solutions system. This section discusses the PeopleSoft Enterprise Campus Solutions-to-SEVIS batch interface functionality business process for student (F/M) visas and for exchange visitor (J) visas.

This flowchart illustrates the SEVIS visa processing business process:



PeopleSoft business process flow for SEVIS visa processing

Identifying New and Changed Data to Submit to SEVIS

1. Run the SEVIS Alerts process.

   Run the appropriate SEVIS Alerts process (Process SEVIS Alerts - F/M process or Process SEVIS Alerts - J). The process identifies information that should be submitted to SEVIS regarding new students (F/M visas) or exchange visitors (J visas) and data changes for existing students or exchange visitors. The process also verifies SEVIS business rules, required fields, and certain eligibility edits.

2. Use the appropriate SEVIS Alerts pages (Select Alerts to Report - F/M or Select Alerts to Report - J) to evaluate the results of the SEVIS Alerts process.

   a. Review all information with errors and take appropriate follow-up action. Errors indicate transactional data that is missing or that needs to be changed before submission to SEVIS.

   b. Review all information requiring additional data. Certain SEVIS events require you to enter additional data.

   c. Review all data with the Send to SEVIS check box selected. The SEVIS Alerts process selects the Send to SEVIS check box for all students or exchange visitors who do not have errors and who do not need to have additional data entered in the SEVIS Alerts pages.

   d. Clear the Send to SEVIS check box for any information that you do not want to include in the XML data file that you send to SEVIS.

e. Save your changes to the SEVIS Alerts pages (Select Alerts to Report - F/M or Select Alerts to Report - J).

Generating the XML Batch Documents for Uploading to SEVIS

Run the SEVIS Export process for the appropriate visa type (Export SEVIS Events - F/M or Export SEVIS Events - J). This process generates XML documents compliant with the SEVIS XML schema. The SEVIS Export process creates multiple XML documents if the number of records transmitted to SEVIS exceeds 100. This process also populates the SEVIS Master component with an inactive row containing the data sent to SEVIS.

Uploading XML Batch Documents to SEVIS

To upload the generated XML documents to SEVIS, you must use a utility that supports secure sockets layer (SSL) and HTTPS. The XML batch document upload process is completed outside the PeopleSoft Enterprise Campus Solutions system using the utility program of your choice.

See the*Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document and batch interface testing documentation from the DHS for the relevant information regarding digital certificate registration and actual batch file transmission.

Downloading XML Transaction Log and PDF Files from SEVIS

To download the XML transaction log files and any form PDF files (I-20 forms or DS-2019 forms) generated by SEVIS, you must use a utility that supports SSL and HTTPS. The XML transaction log and PDF files are compressed into a single file in zip format.

See the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document and batch interface testing documentation from the DHS for the relevant information regarding retrieval and unzipping of the XML transaction log and PDF files. You print the PDF files outside the PeopleSoft Enterprise Campus Solutions system.

Note. Carefully evaluate the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document to determine the period during which the batch process results remain available. The SEVIS system automatically deletes files that are not downloaded within the specified period.

Importing the XML Transaction Log Results

After the compressed batch result file is successfully downloaded and unzipped, import the XML transaction log result files into the PeopleSoft Enterprise Campus Solutions system using the Import Process. Run the Import Process for all applicable result files. Evaluate the transaction log results using the Import Results pages. Review all transactions with errors and take appropriate follow-up action. This process also updates the SEVIS Master component to reflect the data successfully imported to SEVIS and populates the SEVIS ID Maintenance page with the SEVIS IDs for any new students or exchange students and their dependents.

Note. You must resolve eligibility errors returned by SEVIS before the next run of the PeopleSoft SEVIS Alerts process. Allow enough time between reviewing the SEVIS XML transaction log results and running the process again so that you can modify student or exchange visitor transactional data to correct any errors.

Understanding the SEVIS Master Component

When you run the SEVIS Export process (Export SEVIS Events - F/M or Export SEVIS Events - J), all of the data that you export for submission to SEVIS is stored on pages in the SEVIS Master component. The data varies by event. The SEVIS Alerts process (Process SEVIS Alerts - F/M or Process SEVIS Alerts - J) compares this master data to the ongoing SEVIS data to detect updates to the student or exchange visitor and dependent data that should subsequently be submitted to SEVIS.

Warning! Do *not* manually update data on any of the SEVIS Master component pages unless you have made changes directly in the SEVIS RTI that are not reflected in the PeopleSoft SEVIS Master component. The data on the SEVIS Master component pages should always match the data on the SEVIS RTI.

The system populates the SEVIS Master component when running the SEVIS Export process (Export SEVIS Events - F/M or Export SEVIS Events - J). The data varies by event. The status of each record is set to *Inactive* until the Import process is run.

When the Create Student event (for F and M visas) or the Create Exchange Visitor event (for J visas) is successfully imported to SEVIS and the Import process is run, the SEVIS Master component inactive rows are set to *Active.* If the event has errors, the system deletes the SEVIS Master component inactive rows. View the errors on the Import Results pages and determine how to correct them before running the appropriate SEVIS Alerts process (Process SEVIS Alerts - F/M or Process SEVIS Alerts- J) for that visa type again. The Create Student or Create Exchange Visitor event appears on the SEVIS Alerts page (Select Alerts to Report - F/M or Select Alerts to Report - J) again when the SEVIS Alerts process for that visa type runs.

When the Update events are exported, an inactive row is added to the appropriate record in the SEVIS Master component. If the event is successfully imported to SEVIS, the data sent to SEVIS is updated on the active row in the SEVIS Master component and the inactive rows are deleted when the Import process is run. If the update event has errors, the inactive rows are deleted in the SEVIS Master component during the Import process. View the errors on the Import Results component and determine how to correct them before running the appropriate SEVIS Alerts process (Process SEVIS Alerts - F/M or Process SEVIS Alerts - J) for that visa type again. The update event appears on the appropriate SEVIS Alerts pages (Select Alerts to Report - F/M or Select Alerts to Report - J) again when the SEVIS Alerts process for that visa type runs.

Creating and Updating Student or Exchange Visitor and Dependent Data

This section discusses how to:

- Create and update biographical data.
- Create and update addresses data.
- Create and update visa and permit data.
- Create and update citizenship and passport data.
- Maintain SEVIS ID information.
- Create and update student port of entry information (F and M visas).
- Create and update driver’s license data (F and M visas)
- Create and update employment authorization information (F and M visas).

Pages Used to Create and Update Student or Exchange Visitor and Dependent Data

Page Name	Object Name	Navigation	Usage
Biographical Details	SCC_BIO_DEMO_PERS	Campus Community, SEVIS, Personal Information, Add/Update a Person, Biographical Details	Enter or update biographical data required by SEVIS for an individual.
Birth Detail	SA_BIRTH_DETAIL	Click the Birth Information link on the Biographical Details page.	Enter or update birth information for an individual.
Addresses	ADDRESSES_89	Click the Addresses link on the Biographical Details page.	Enter or update address information required by SEVIS for a student or exchange visitor.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Addresses page.	Enter or update address information required by SEVIS for a student or exchange visitor.
Visa/Permit Data Detail	VISA_PERMIT_DETAIL	Click the Visa/Permit Data link on the Biographical Details page.	Enter visa and permit data for an individual.
Visa/Permit Data	VISA_PERMIT_DATA	Campus Community, SEVIS, Personal Information, Visa/Permit Data or click the Visa/Permit link on the Biographical Details page.	Enter an individual's visa and permit information for SEVIS.
Citizenship Detail	SA_CITIZENSHIP_DTL	Click the Citizenship link on the Biographical Details page.	Enter citizenship and passport data for an individual.
Citizenship/Passport Data	CITIZEN_PASSPORT	Campus Community, SEVIS, Personal Information, Citizenship/Passport Data	Enter or update an individual's citizenship and passport data for SEVIS.
SEVIS ID Maintenance	SEV_ID_MAINT	Campus Community, SEVIS, SEVIS Maintenance, SEVIS ID Maintenance	Enter or update SEVIS ID information for an individual.
Port of Entry Data	SEV_POE_DATA	Campus Community, SEVIS, Personal Information, Visa/Permit Data, Port of Entry Data	Track an individual's port of entry into the United States for F or M student visas.
Driver's License Data	DRIVERS_LIC_SA	Campus Community, SEVIS, Personal Information, Driver's License Data	Enter or update license numbers and driving record information for F or M student visas.

Page Name	Object Name	Navigation	Usage
Employment Authorizations	SEV_EMPL_AUTH	Campus Community, SEVIS, Employment Authorizations	Enter or update employment authorization information for an individual for F or M student visas.
SEVIS Employer Address	SEV_EMPL_ADDR	Click the Employer Address button on the Employee Authorization page.	Enter or update employer address information for F or M student visas.

Creating and Updating Biographical Data

Access the Biographical Details page.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Adding or Updating Biographical Details Data, page 198.

SEVIS requires specific biographical data for each student and dependent. The Export SEVIS Events - F/M or Export SEVIS Events - J process pulls this required data from the Biographical Details page. Be sure to complete the following fields to provide the data required by SEVIS.

Note. PeopleSoft stores up to the ninth digit of the U.S. postal code in SEVIS Master to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in SEVIS Master. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run the export and alerts processes, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the processes ignores everything after the ninth digit.

Person Information

Date of Birth Enter the individual's date of birth.

Birth Information (link) SEVIS requires the name of the individual's birth city (J visa only) and country. Click this link to enter the individual's birth city and country. Enter birth city in the Birth Location field.

Contact Information - Address

The address types reported to SEVIS are based on the types defined in the US and Foreign fields on the SEVIS Setup page. You can view the address data on the Biographical Details page, and edit the data on the Addresses page.

For F and M student visas, SEVIS requires that each student with the creation reason of *Initial* on the I-20 form must have a foreign address.

For exchange visitor J visas, SEVIS requires that each exchange visitor have a U.S. address. If the exchange visitor does not have a U.S. address, the address entered for the Program Sponsor is sent with the Create EV event.

Addresses Click this link to access the Addresses page, where you can edit address data to comply with SEVIS requirements.

For a foreign address, make sure these fields are completed:

- Country

- Address 1

For a U.S. address, make sure these fields are completed:

- Address 1
- City
- State
- Postal

Note. You can also click the Visa/Permit Data and Citizenship links at the bottom of the Biographical Details page to access the respective detail pages, where you can view or update data. When you save the detail page, the system writes the data to the primary data pages (Visa/Permit Data page and Citizenship/Passport Data page) also.

Creating and Updating Visa and Permit Data

Access the Visa/Permit Data page.

See Chapter 24, "Managing Identification Data," Entering Visa and Permit Data, page 276.

Visa/Permit Data

Type The visa type, either *F, M,* or *J,* that you enter on the Visa/Permit Data page must correspond to a visa type defined on the Visa Mapping page for the system to send the individual's information to SEVIS.

Creating and Updating Citizenship and Passport Data

Access the Citizenship/Passport page.

See Chapter 24, "Managing Identification Data," Entering Citizenship and Passport Data, page 275.

Citizenship/Passport

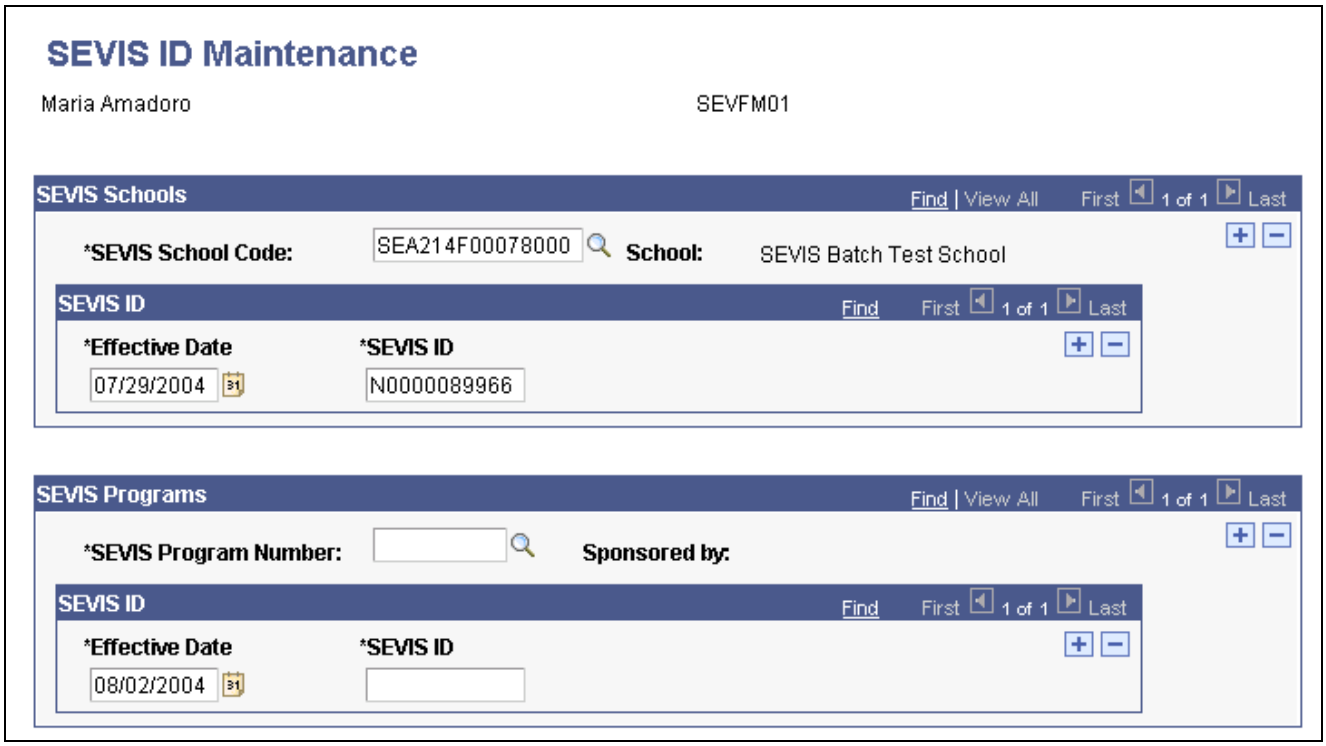
Country Enter the country of citizenship to use on the I-20 form or the DS-2019 form. If you enter more than one non-US country, you must indicate on the form which citizenship country to send to SEVIS.

Passport Information

Passport Number, Issue Date, Expiration Date, and**Country** This data is not required by SEVIS but, when provided, is reported as part of the F and M visas Edit Personal Event.

Maintaining SEVIS ID Information

Access the SEVIS ID Maintenance page.



SEVIS ID Maintenance page

Use this page to store the SEVIS ID provided by the DHS for students or exchange visitors and their dependents. The SEVIS ID is an 11-character unique identifier that SEVIS uses for students, exchange visitors, and their dependents related to a specific school code or program number. The system displays only the SEVIS IDs of the school codes or program numbers for which you have security clearance.

Running the Import process for new students, exchange visitors, and dependents automatically populates the ID field. You may need to manually enter this value if you initially created the student or exchange visitor, or the dependent using the SEVIS RTI.

SEVIS Schools

SEVIS School Code For F and M visas, enter each school code for which a student has an I-20 form or is listed as a dependent on an I-20 form.

SEVIS ID

Effective Date and **SEVIS ID** Enter the effective date and ID for each student or dependent related to that school code.

SEVIS Programs

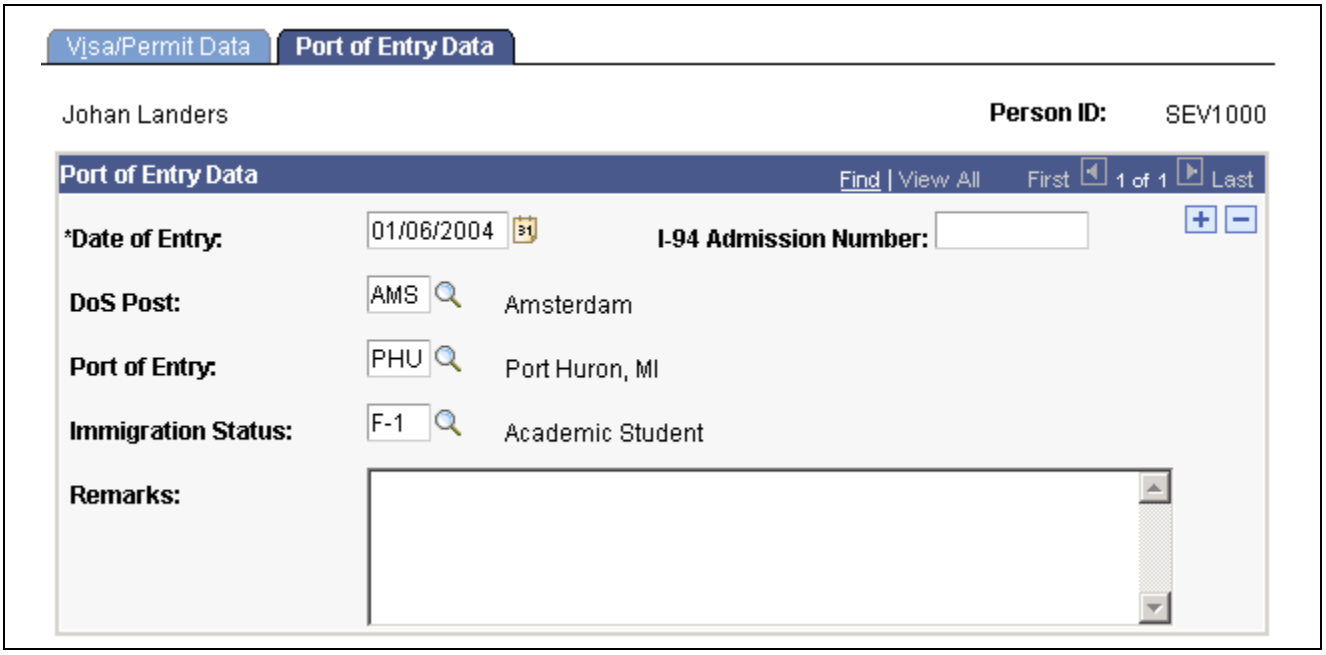
SEVIS Program Number For J visas, enter the program number for which an exchange visitor has a DS-2019 form or is listed as a dependent on a DS-2019 form.

SEVIS ID

Effective Date and **SEVIS ID** Enter the effective date unique ID for each exchange visitor or dependent related to that program number.

Creating and Updating Student Port of Entry Information (F and M Visas)

Access the Port of Entry Data page.



Port of Entry Data page

For F and M visa processing, you can record data about a student's date and location of entry into the U.S. The SEVIS system is the official record of this data. However, you may find it helpful to record this information in your own database system.

Creating and Updating Driver's License Data (F and M Visas)

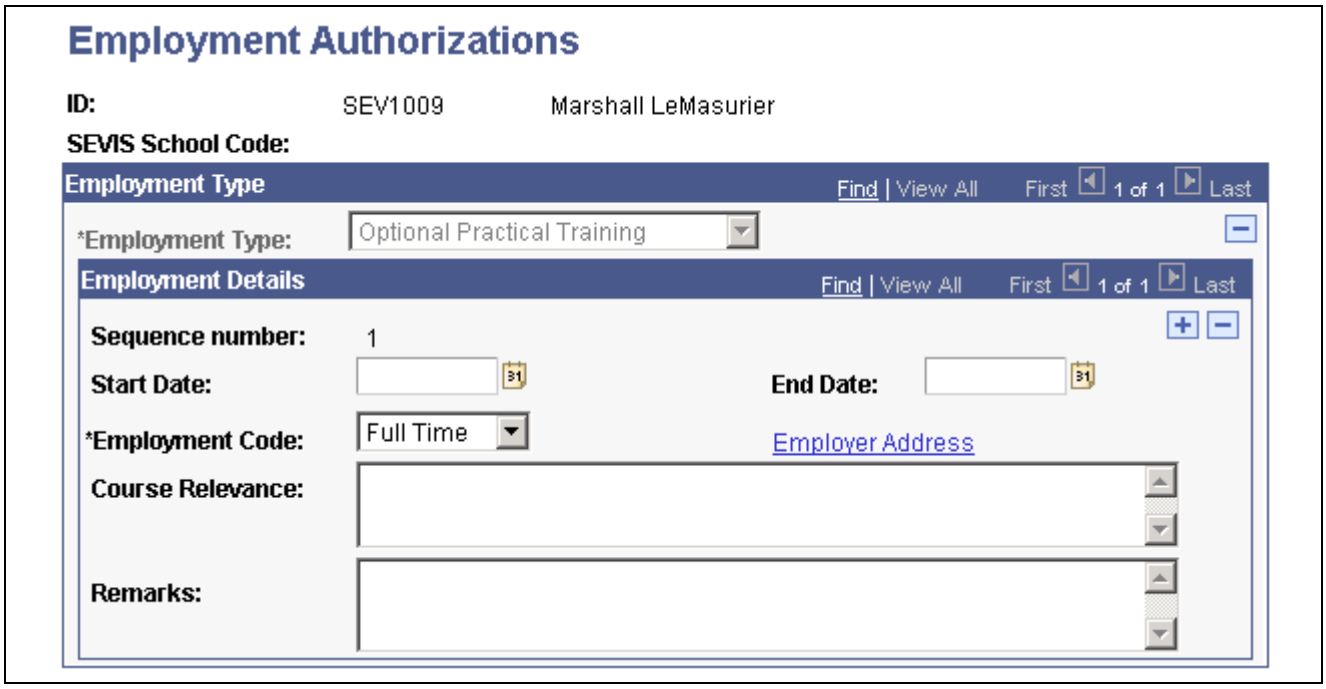
Access the Driver's License Information page.

See Chapter 24, "Managing Identification Data," Entering Driver's License Data, page 278.

Driver's License # and **State** SEVIS does not require driver's license data; however, the driver's license number and issuing state, when provided, is reported as part of the F and M visas Create Student and Edit Personal events.

Creating and Updating Employment Authorization Information (F and M Visas)

Access the Employment Authorizations page.



Employment Authorizations page

Employment Type

Employment Type For F and M visas, select the employment type relevant to the authorization or endorsement for this student.

Options are:

- *Curricular Practical Training* (CPT)
- *Optional Practical Training* (OPT)
- *Off-Campus* (to enter recommendation information for the student to obtain off-campus employment authorization)

M-1 students are only authorized for OPT. The system does not enable you to enter CPT or off-campus employment for an M-1 student.

F-1 students are eligible for all employment authorizations.

Note. The fields in the Employment Details group box remain the same for CPT and OPT. The system displays different fields when you enter the *Off-Campus* employment type.

Employment Details (CPT and OPT employment types)

Sequence Number Displays the number that the system uses to track multiple rows.

Start Date Enter the date when the employment is expected to begin.

End Date Enter the date when the employment is expected to end.

The employment type *Curricular Practical Training* requires that the end date not exceed the end date for the student on the I-20 form

Employment Code Select either *Part-time* or *Full-time.*

Employer Address Click to access the SEVIS Employer Address page, where you can enter employer name and address information.

If the employer is defined in the External Organization table, you can enter that employer on the SEVIS Employer Address page to populate the Employer Name, Address 1, Address 2, City, State, and Postal Code fields.

Note. PeopleSoft stores up to the ninth digit of the U.S. postal code in SEVIS Master to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in SEVIS Master. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run the export and alerts processes, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the processes ignores everything after the ninth digit.

You can also enter employer name and address information on the SEVIS Employer Address page manually without using an external organization ID.

Note. Employer information is required for CPT authorizations, but it is optional for OPT endorsements.

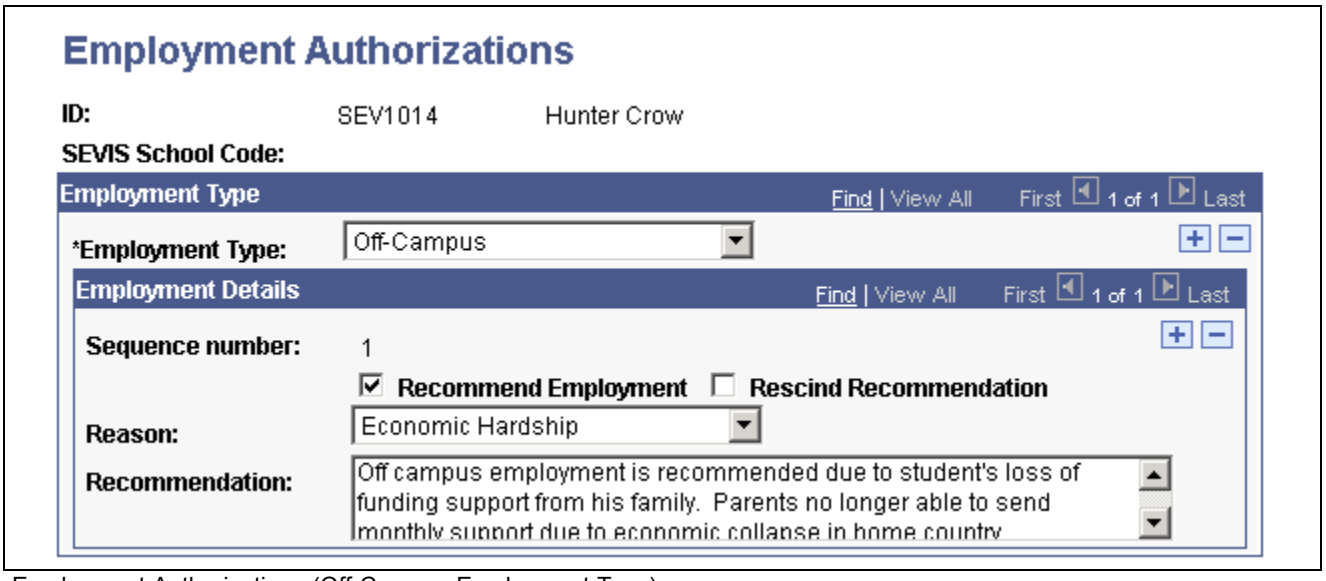
Course Relevance Enter remarks identifying the relevance of the employment to the student's course of study.

Remarks are required here for both CPT and OPT employment types.

Remarks Remarks here are optional, but are submitted to SEVIS when provided.

Employment Details (Off-Campus Employment Type)

When you enter the employment type of *Off Campus,* the fields in the Employment Details group box change.



Employment Authorizations (Off-Campus Employment Type) page

Sequence Number Displays the number that the system uses to track multiple rows.

Recommend Employment Select to indicate that the student is recommended for off-campus employment authorization. The employment of *Off-Campus* for the first time, or when you insert a new row.

Rescind Recommendation Select to indicate that the school is rescinding the recommendation for off-campus employment authorization.

Reason The available options are *Economic Hardship, International Organization,* and *Special Student Relief.*

The DHS defines the reasons in the Student Off-Campus Employment Codes section of the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface*document.

Recommendation Enter general remarks regarding the student's off-campus employment.

This field is required for off-campus employment.

Tracking Full Course Load Exceptions for F and M Visas

This section discusses how to:

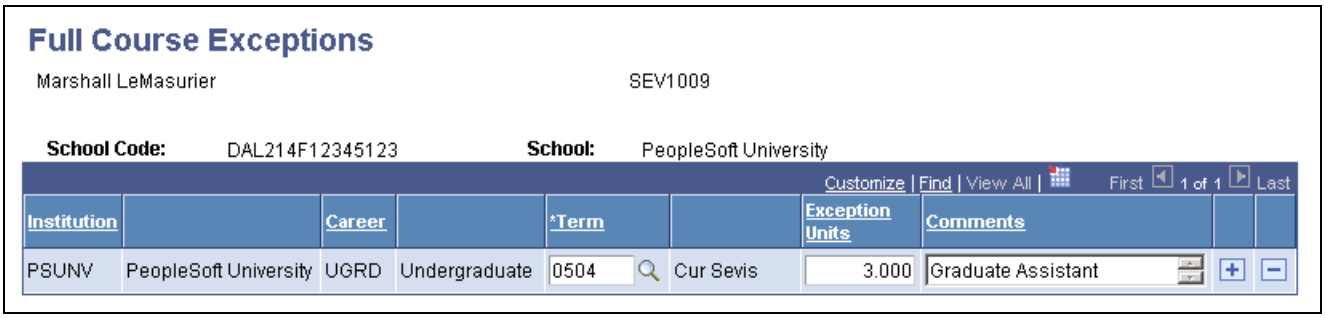
- Track full course load exception rules.
- Track external full course load exceptions.
- Assign full course load exceptions in batch.

Pages Used to Track Full Course Load Exceptions for F and M Visas

Page Name	Object Name	Navigation	Usage
Full Course Exceptions	SEV_FULCRS_EXCP	Campus Community, F/M Full Course Exceptions, Full Course Exceptions	Enter or update exceptions to the full course load for an individual F or M visa holder.
External Full Course Exception	SEV_FULCRS_EXCP2	Campus Community, F/M Full Course Exceptions, External Full Course Exception	Enter or update exceptions to the full course load for an individual F or M visa holder when using the External System Extract process.
Full Course Exception Load	RUNCTL_CCSEVFCE	Campus Community, F/M Full Course Exceptions, Full Course Exception Load	Process exceptions to the full course load for a group of F or M visa individuals by student group or job code.

Tracking Full Course Load Exception Rules

Access the Full Course Exceptions page.



Full Course Exceptions page

For F and M student visa processing, you can specify exception units for students who are not enrolled for a full course of study as defined by the academic level and load rules. You can then track students who have your institution's permission to enroll in less than a full course of study. You are not required to submit to SEVIS the Drop Below Full-time Reason code for those students. For example, a graduate assistant who, by institutional agreement and definition, enrolls for fewer units than typical graduate-level students, might not drop below full-time.

The Process SEVIS Alerts - F/M process evaluates data entered for any students who are not enrolled full-time, but whose data is entered for the combination of institution, career, and term that the process uses.

The grid displays the eligible institutions and careers in which the student is eligible to enroll. Enter multiple rows with the term and exception units for students who are granted exceptions that span multiple terms.

You can also use the Full Course Load Exception process to populate this page for large groups of students.

The system displays the student name, ID, school code, school, institution, and career.

Term Select the term value for which you are granting the student an exception.

The only terms that appear are those in which the student has been term-activated and in which the student is eligible to enroll.

Exception Units Enter the exception units considered full-time that the student is granted.

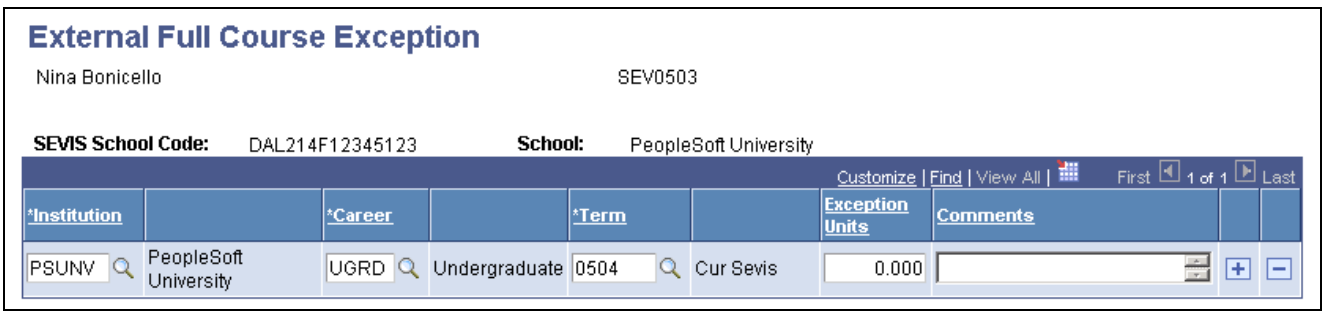
The SEVIS process evaluates the exception units entered for the institution, career, and term combination as part of the Auth Drop Below FC event alert processing.

You can enter *0.000* for the exception units.

Comments Add comments if appropriate.

Tracking External Full Course Load Exceptions

Access the External Full Course Exception page.



External Full Course Exception page

In conjunction with the External System Extract, you can specify exception units for F or M visa students who are not enrolled for a full course of study as defined by the academic level and load rules. You can then track students who have your institution's permission to enroll in less than a full course of study. The exception entered here determines the full-time status that is populated in the External System Extract process.

The grid displays the eligible institutions and careers in which the student is eligible to enroll. Enter multiple rows with the term and exception units for students granted exceptions that spans multiple terms.

You can also use the Full Course Load Exception process to populate this page for large groups of students.

Institution Select the institution for which the student is term-activated.

Career Select the career for which the student is term-activated.

Term Select the term value for which you are granting the student an exception. The only terms that appear are those in which the student is term-activated and in which the student is eligible to enroll.

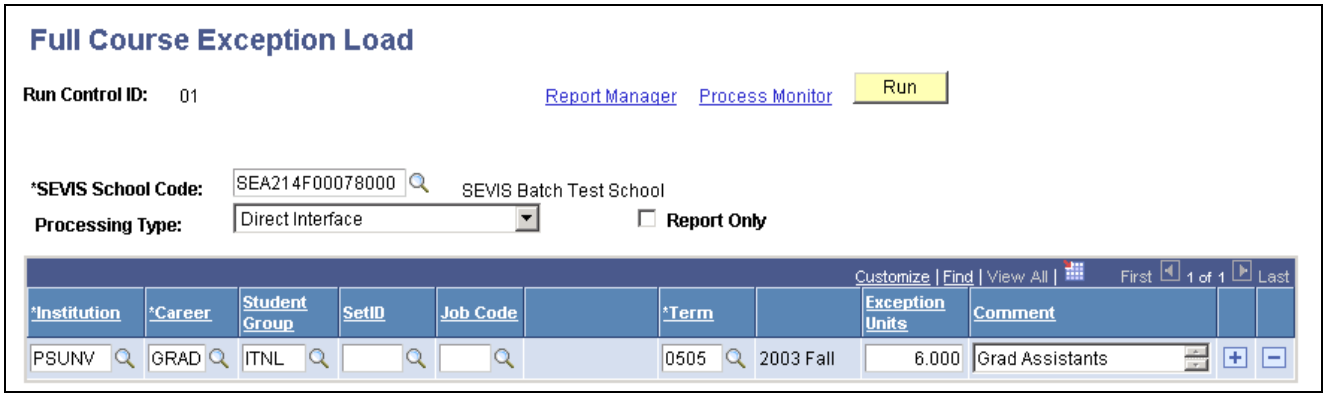
Exception Units Enter the exception units considered full-time that the student is granted. The External System Extract process uses this value to determine the full course status populated in the extract XML file.

You can enter *0.000* for the exception units.

Comments Add comments if appropriate.

Assigning Full Course Load Exceptions in Batch

Access the Full Course Exception Load page.



Full Course Exception Load page

For F and M visas processing, the Full Course Exception Load page enables you to assign a full course exception for a group of students in either a specific student group or with a specific job code rather than adding an exception one student at a time. You can use this process to populate the Full Course Exceptions page or the External Full Course Exception page, depending on the processing type that you select. You can add multiple rows if you have more than one student group or job code from which you want to select students.

SEVIS School Code For the direct interface, select the school code from which to select the students.

For the External Extract process, select the school code that you want to use for each student granted the full course exception.

Processing Type The options for processing type are *Direct Interface* and *External Extract Process.* Select the appropriate option based on the process that your institution uses to report data to SEVIS.

The Direct Interface option selects students with an F-1 or M-1 visa status who have an I-20 record for the selected school code who are term-activated for combination of institution, career, and term indicated and who belong to either the student group or job code indicated.

The External Extract Process option selects students with an F-1 or M-1 status who are term-activated for the combination of institution, career, and term indicated and who belong to either the student group or job code indicated.

Report Only Select to run the process to obtain a listing of the students selected without inserting the data into the student's full course exception record. This enables you to check the student population selected before the data is populated.

Clearing the Report Only field allows the data to populate on the Full Course Exceptions page for the students selected.

Student Group Select the appropriate student group.

SetID Select the setID for the job code.

Job Code Select the appropriate job code.

Term Enter the term to appear on the Full Course Exceptions page or External Full Course Exception page.

Exception Units Enter the exception units to appear on the Full Course Exceptions page or the External Full Course Exception page.

Comment Enter a comment to appear on the Full Course Exceptions page or External Full Course Exception page.

When you run the External System Export process, the XML indicates the full-time status of the student by using the full course exception entered. For example, suppose that a student is enrolled for nine hours and the level and load rules designated this a three-quarters time. A full course exception of nine hours is entered for the student, so the full-time status for the student is set to *Y* on the XML output, as shown in this code sample:

```
<EducationalInfo>
  <FullTime>Y</FullTime>
- <AcademicData>
    <Institution>PSUNV</Institution>
    <InstitutionDescr>PeopleSoft University</InstitutionDescr>
    <Career>UGRD</Career>
    <CareerDescr>Undergraduate</CareerDescr>
    <SEVISSchoolCodeId>DAL214F12345123</SEVISSchoolCodeId>
    <AdmitTerm>0487</AdmitTerm>
    <AdmitTermDescr>2003 Spring</AdmitTermDescr>
    <EnrollTerm>0487</EnrollTerm>
    <EnrollTermDescr>2003 Spring</EnrollTermDescr>
    <PrimaryMajorCIPCode>42.0101</PrimaryMajorCIPCode>
    <PrimaryMajor>PSYCH</PrimaryMajor>
    <PrimaryMajorDescr>Psychology</PrimaryMajorDescr>
    <AcademicProgram>LAU</AcademicProgram>
```

```
  <AcademicProgramDescr>Liberal Arts Undergraduate</AcademicProgramDescr>
  <ProgramAction>ACTV</ProgramAction>
  <ProgramActionDescr>Activate</ProgramActionDescr>
  <ProgramStatus>AC</ProgramStatus>
  <ProgramStatusDescr>Active in Program</ProgramStatusDescr>
  <AcademicLoad>H</AcademicLoad>
  <AcademicLoadDescr>Enrolled Half-time</AcademicLoadDescr>
  <CourseUnits>9.000</CourseUnits>
  <FullCourseOverride>Y</FullCourseOverride>
  <FullCourseExceptionUnits>9.000</FullCourseExceptionUnits>
  <CurrentSessionEndDate>2003-05-15</CurrentSessionEndDate>
  <NextSessionStartDate>2003-08-27</NextSessionStartDate>
  <ExpectedGradTerm>0505</ExpectedGradTerm>
  <ExpectedGradTermDescr>2003 Fall</ExpectedGradTermDescr>
  <PrgStartDate>2003-01-20</PrgStartDate>
</AcademicData>
```

Creating and Updating Student Data for I-20 Forms (F and M Visas)

The I-20 Form pages included in the PeopleSoft system display relevant I-20 form data in a sequence similar to the actual I-20 form document produced by SEVIS. The SEVIS system produces the actual I-20 form documents in PDF format using data provided by your institution.

The PeopleSoft I-20 Form pages are keyed by ID (emplID) and school code. Access to the form is controlled through SEVIS school code security.

Note. The PeopleSoft system requires that any student for whom you are entering I-20 form data must have an appropriate F-1 or M-1 visa type defined on the Visa/Permit Data page.

The PeopleSoft system enables you to enter I-20 information in two online formats: a multi-tabbed format and a continuous page format. The fields are the same for both formats. The continuous page format is illustrated in this document.

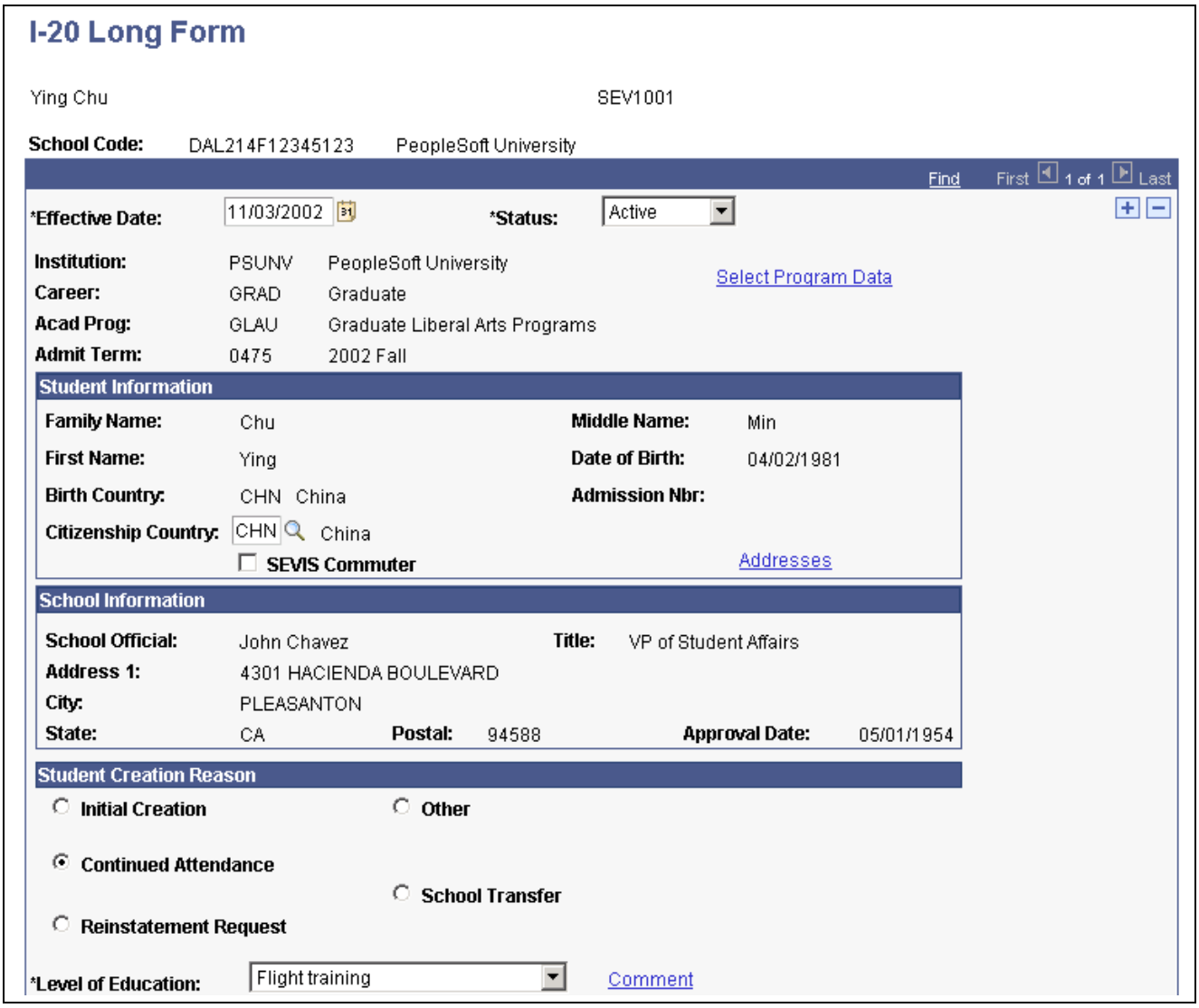
This section discusses how to create and update I-20 form data.

Pages Used to Create and Update Student Data for I-20 Forms (F and M Visas)

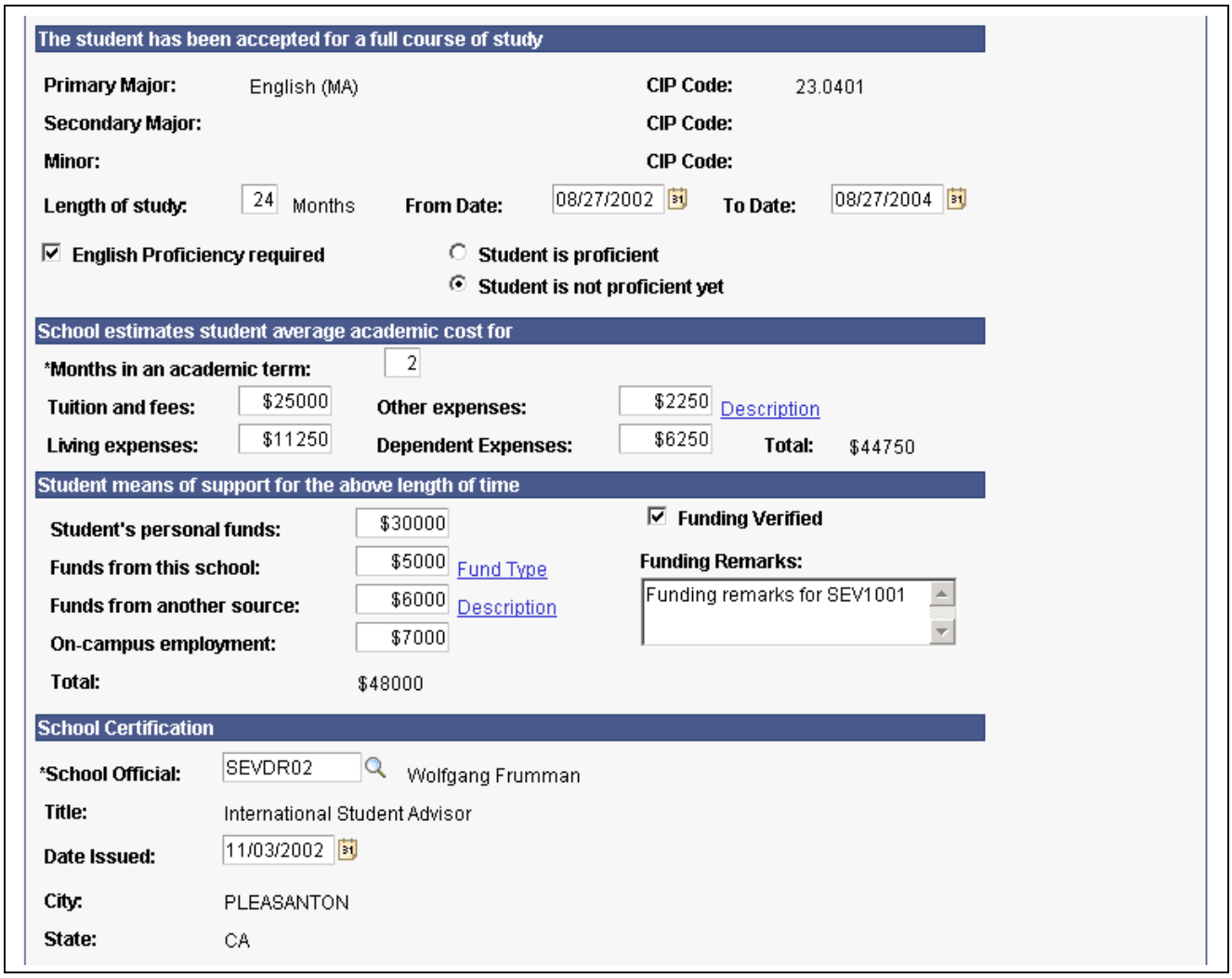
Page Name	Object Name	Navigation	Usage
I-20 Long Form	I20_FORM	Campus Community, SEVIS, I-20 Forms, I-20 Long Form	Create or update I-20 information.
Program Selection	SEV_I20_SEL_SEC	Click the Select Program Data link on the I-20 Form page.	Select an institution, career, and academic program combination.

Entering I-20 Form Data

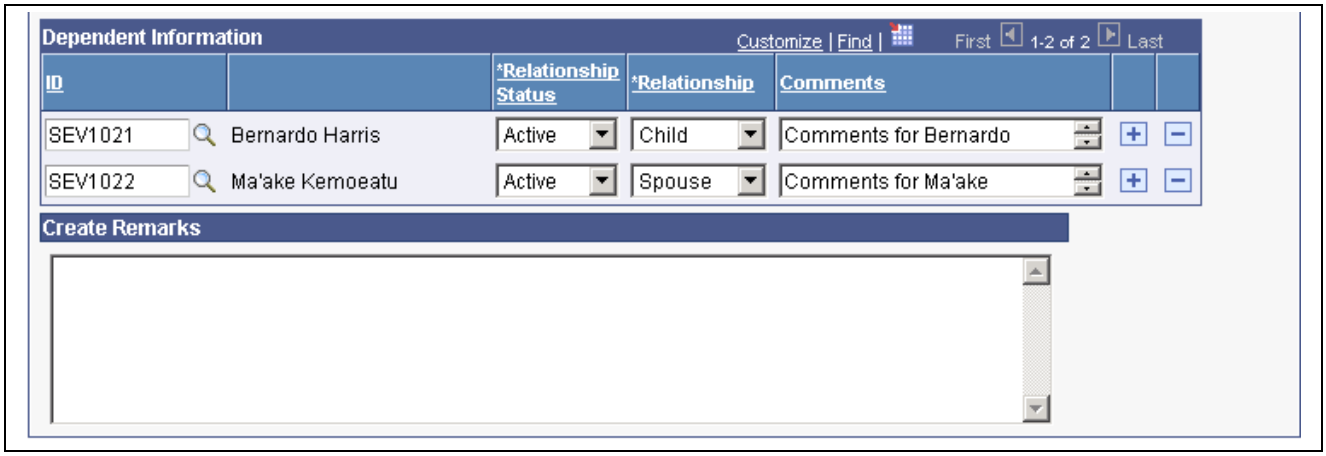
Access the I-20 Long Form page.



I-20 Long Form page (1 of 3)



I-20 Long Form page (2 of 3)



I-20 Long Form page (3 of 3)

Status Select *Active* or *Inactive.*

Only active I-20 form rows are included in the Process SEVIS Alerts - F/M process.

Institution, Career, Acad Program (academic program), and **Admit Term**

The system displays the:

institution entered for the student,

career entered for the institution,

academic program entered for the career, and

admit term entered for the student in the specified program.

Select Program Data

Click to access the Program Selection page, where you can determine if more than one combination of institution, career, academic program, and admit term exists for the student.

If more than one exists, select the check box on the Program Selection page for the line that contains the appropriate information to print on the I-20 form.

The valid institutions for the school code and the valid careers for the institution are based on the setup of the SEVIS School Code table.

SEVIS Commuter

Select if the student is a commuter student.

The commuter student indicator is valid only for students whose country of citizenship is Canada or Mexico. Commuter students are not required to provide US address data.

Student Information

Family Name, First Name, and **Middle Name**

Displays the student's last, first, and middle names according to the name type entered on the SEVIS Setup page.

Note. You must access the Biographical Details page in the Add/Update a Person component and select the Names link to make any name changes.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Entering Biographical Details, page 201.

Date of Birth

Displays the birth date that is entered on the Biographical Details page in the Add/Update a Person component.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Entering Biographical Details, page 201.

Birth Country

Displays the country of birth that is entered on the Biographical Details page in the Add/Update a Person component.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Entering Biographical Details, page 201.

Admission Number

Displays the I-94 admission number that is entered on the Port of Entry Data page.

Citizenship Country

Select the citizenship country to report to SEVIS.

If the student has only one non-US citizenship country, the system displays it by default.

This field is required.

Addresses Click to view the foreign and US addresses based on the address types entered on the SEVIS Setup page.

School Information

The system displays information here from the School Information section of the SEVIS School Code table.

Student Creation Reason

You can select only one reason. Options are:

- *Initial Creation*
- *Continued Attendance*
- *Reinstatement Request*
- *Other* (If you select this creation reason, a text box appears where you must also enter an explanation.)
- *School Transfer* (If you select this creation reason, a text box appears where you must also enter the name of the school from which that student has transferred.)

Note. As of December, 2003, *Initial Creation* is the only reason that can be submitted to SEVIS via batch processing.

Level of Education Enter the level of education for the visa type classification entered for this student on the Visa/Permit Data page.

If you use the I-20 template and the student's academic data on the template matches the information here, the system displays the level of education from the template by default.

This field is required.

Note. A student must have a visa type on the Visa/Permit Data page for the system to send the student's information to SEVIS. If no level of education values are available on this page, a visa type has not been entered for the student on the Visa/Permit Data page.

Values for F-1 visa classification are:

- *Primary*
- *Secondary*
- *Associate*
- *Bachelor's*
- *Master's*
- *Doctorate*
- *Language Training*
- *High School*
- *Other*

Values for M-1 visa classifications are:

- *High School*

- *Flight Training*
- *Other Vocation School*

Comment Click to enter remarks related to the student's level of education.

If the Level of Education field value is *Other,* you must enter comments to describe the other level of education. Otherwise, comments optional.

Comments are sent to SEVIS when provided.

The student has been accepted for a full course of study

Primary Major and **CIP Code** Primary major information comes from the student records academic plan with the minimum student career number and minimum sequence number where the plan type is one of the selected major plan types on the SEVIS Setup page.

If no data exists for the student records academic plan, the information comes from the admissions application academic plan with the minimum sequence number where the plan type is on the selected major plan types on the SEVIS Setup page.

The CIP code is the code related to the academic plan as assigned on the Academic Plan Taxonomy table.

The CIP code is reported to SEVIS.

Secondary Major and **CIP Code** Secondary major information comes from the student records academic plan with the second most minimum sequence number where the plan type is one of the selected major plan types on the SEVIS Setup page.

If no data exists for the academic plan, the information comes from the admissions application academic plan with the second most minimum sequence number where the plan type is one of the selected major plan types on the SEVIS Setup page.

The CIP code is the code related to the academic plan as assigned on the Academic Plan Taxonomy table.

The CIP code is reported to SEVIS.

Minor and **CIP Code** The minor is determined on the SEVIS Setup page.

The system compares information from either the student or application academic plan or academic subplan where the plan types are equal to that on the SEVIS Setup page. The minor selected from academic subplan is the minimum sequence number with the indicated plan type related to the primary major. The minor selected from the academic plan is the minimum sequence number with the indicated plan type equal to that on the SEVIS Setup page.

The CIP code is the code related to the academic plan or academic subplan as assigned on the Academic Plan Taxonomy or Academic Sub-Plan Taxonomy page.

The CIP Code is reported to SEVIS.

Length of Study Enter the number of months normally required for completing the program that the student undertakes.

This value may also display by default from the I-20 template.

From Date

By default, the system displays the start date of the student's admit term from the Student Program/Plan page or the Application Program Data page, as the date when the student's program begins.

You can modify this.

If the student creation reason is *Initial,* the from date must be greater than or equal to today's date.

If the Student Creation Reason is *Continue,* the from date must be previous to today's date.

To Date

Displays the date when the student's program is to be completed.

By default, the system adds the value from the Length of Study field to the from date and displays it here.

You can modify this.

English Proficiency required

Select if the school requires English proficiency for this student.

If selected, you must indicate whether or not the student is proficient by selecting the appropriate values. Options are *Student is proficient* or *Student is not proficient yet.*

If this check box is not selected, you must provide an explanation in the text box of why English proficiency is not required at the school.

School estimates student average academic cost for

Months in an academic term

Enter the number of months that the student is to attend courses during an academic term.

This value may also appear by default from the I-20 template.

Tuition and fees

Enter the total amount of tuition expenses the student must pay.

This value may also appear by default from the I-20 template.

Tuition and fees must be entered before selecting the Funding Verified check box.

Other expenses

Enter other expenses that the student must pay.

If you enter a value, you must click *Description,* and provide an explanation of the other expenses.

This value may also appear by default from the I-20 template.

Description

Click to access the page where you provide an explanation of the other expenses.

Living expenses

Enter the total amount of living expenses that the student must pay.

This value may also appear by default from the I-20 template.

Living Expenses must be entered before selecting the Funding Verified check box.

Dependent Expenses

Enter the total amount of dependent expenses that the student must pay.

This value may also appear by default from the I-20 template.

Enter a value here only if the student is accompanied by dependents.

Student means of support for the above length of time

Student's personal funds Enter the total amount of personal funds available to the student for use in paying for expenses.

Funds from this school Enter the total amount of funds being provided by the school.

If you enter a value here, you must also click *Fund Type,* and enter an explanation of the funds provided by the school.

Fund Type Click to access the page where you enter an explanation of the type of funds provided by the school.

Funds from another source Enter the total amount of funds provided from another source.

If you enter a value here, you must also click *Description*, and enter an explanation describing the source of the other funding.

Description Click to access the page where you enter a description of the source of the other funding.

On-campus employment Enter the total amount of funds available to the student through on-campus employment.

Funding Verified Select this check box when the student's funding is verified and the student information is ready to send to SEVIS.

You must select this check box for the student information to be processed for sending to SEVIS. Failure to select it results in the student's information not being selected for submission to SEVIS.

An error message appears, if:

- The total means of support provided by the student is not equal to or greater than the total expenses.
- No visa type is entered for the student.
- Tuition and fees or living expenses are 0.
- A dependent is entered, but no dependent expenses are entered.
- Dependent expenses are entered, but no dependent is entered.

Funding Remarks Enter optional, general remarks associated with the funding information.

School Certification

School Official Enter the designated school official (DSO) responsible for the student's record.

This value may also appear by default from the I-20 template.

This prompt displays only the DSOs assigned to the school code on the SEVIS School Code table.

Title The system displays the title for the DSO from the SEVIS School Code table.

Date Issued Enter the date when the I-20 form was issued or entered.

The default date is the system date. You can modify it.

The date is informational only and is not sent to SEVIS. The DHS provides the issue date on the I-20 PDF returned from SEVIS.

City, State Displays the city and state for the DSO from the School Information section of the SEVIS School Code table.

Dependent Information

Enter dependent information.

Warning! Do *not* delete dependent rows unless you make an error in adding the dependent's ID. If you delete the dependent ID, the dependent events are not reported to SEVIS. Change the status of the dependent to *Inactive* instead of deleting the row. If you try to delete the dependent, you receive a warning regarding the ramifications.

ID Enter the ID of each person accompanying the student as a dependent. (Dependents must be added to the database on the Biographical Details page of the Add/Update a Person component.)

Refer to the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document for required data for each dependent.

Relationship Status Enter the status of the dependent.

If the status is *Active*, the dependent is reported along with the student during the Create Student event. The Reactivate Dependent event also uses this value.

If the status is changed to *Inactive*, the Terminate Dependent event is triggered.

This is a required field with a default value of *Active*.

Relationship Enter the dependent's relationship to the student. Values include *Child* and *Spouse*.

Regulations permit only one spouse to accompany the student during study in the U.S. If you enter more than one dependent as a spouse, you receive an error.

This is a required field.

Termination Reason This field appears only when theRelationship Status field is set to *Inactive*.

If the relationship status is *Inactive*, you must provide the reason that the dependent is terminated.

The reasons listed are the values provided by the DHS and sent as part of the Terminate Dependent event.

Comments Enter any additional remarks regarding the dependent.

Remarks entered here are reported to SEVIS with the Create Student, Add Dependent, Edit Dependent Personal, and Terminate Dependent events.

Comments are optional.

Create Remarks

You can optionally enter remarks to send to SEVIS with the Create Student event.

Creating and Updating Exchange Visitor Data for DS-2019 Forms (J Visas)

The DS-2019 form pages included in the PeopleSoft system display relevant DS-2019 form data in a sequence similar to the actual DS-2019 form document produced by SEVIS. The SEVIS system produces the actual DS-2019 form documents in PDF format using data provided by your institution.

The DS-2019 form is keyed by ID and program number. Access to the form is controlled through SEVIS Program Sponsor Security.

Note. The PeopleSoft system requires that any exchange visitor, for whom you are entering DS-2019 form data, must have an appropriate J1 visa type defined in the Visa/Permit Data page.

PeopleSoft enables you to enter DS-2019 information in two online formats, a multi-tabbed format and a continuous page format. The fields are the same for both formats. The continuous page format is illustrated in this document.

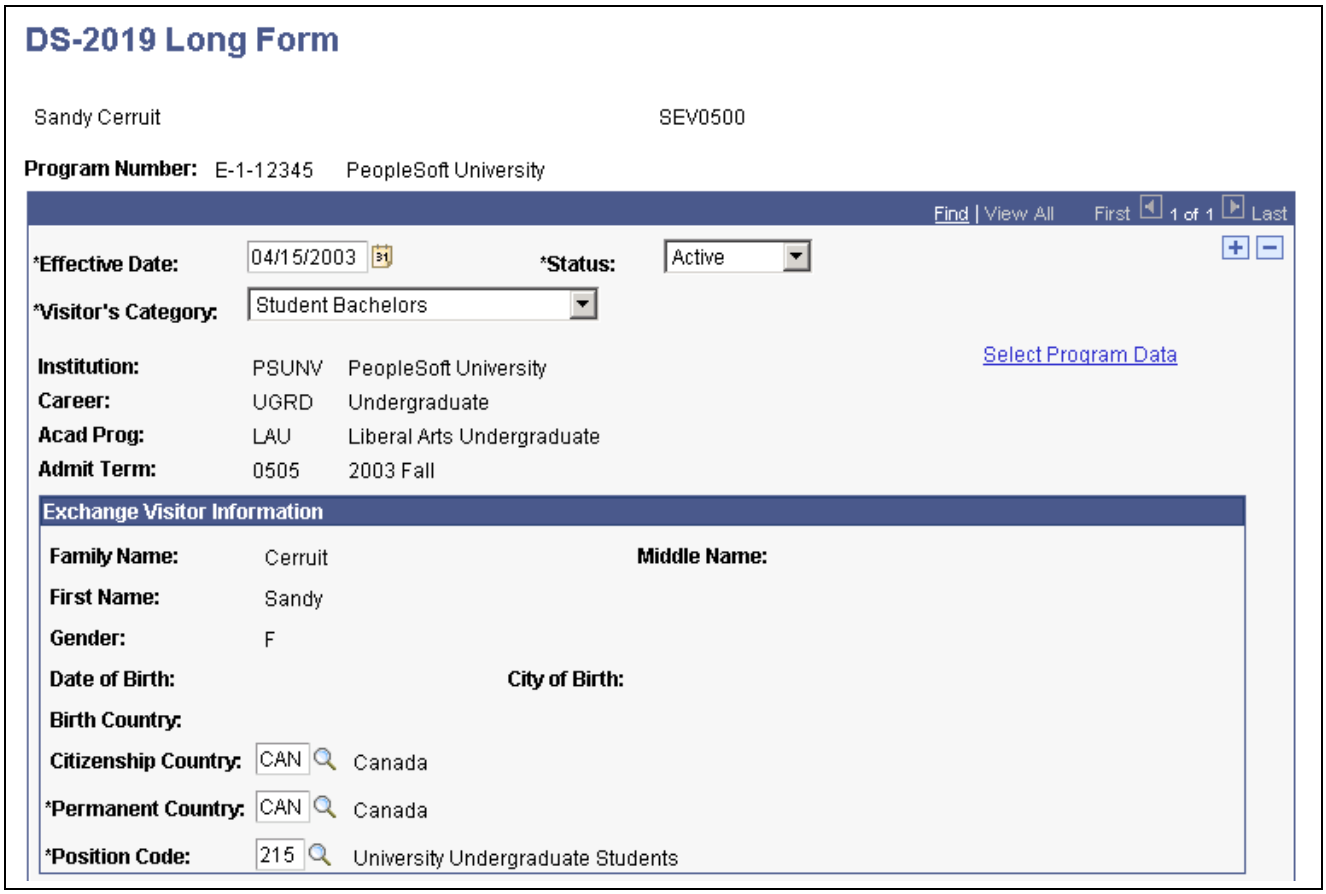
This section discusses how to create and update DS-2019 form data.

Pages Used to Create and Update Exchange Visitor Data for DS-2019 Forms (J Visas)

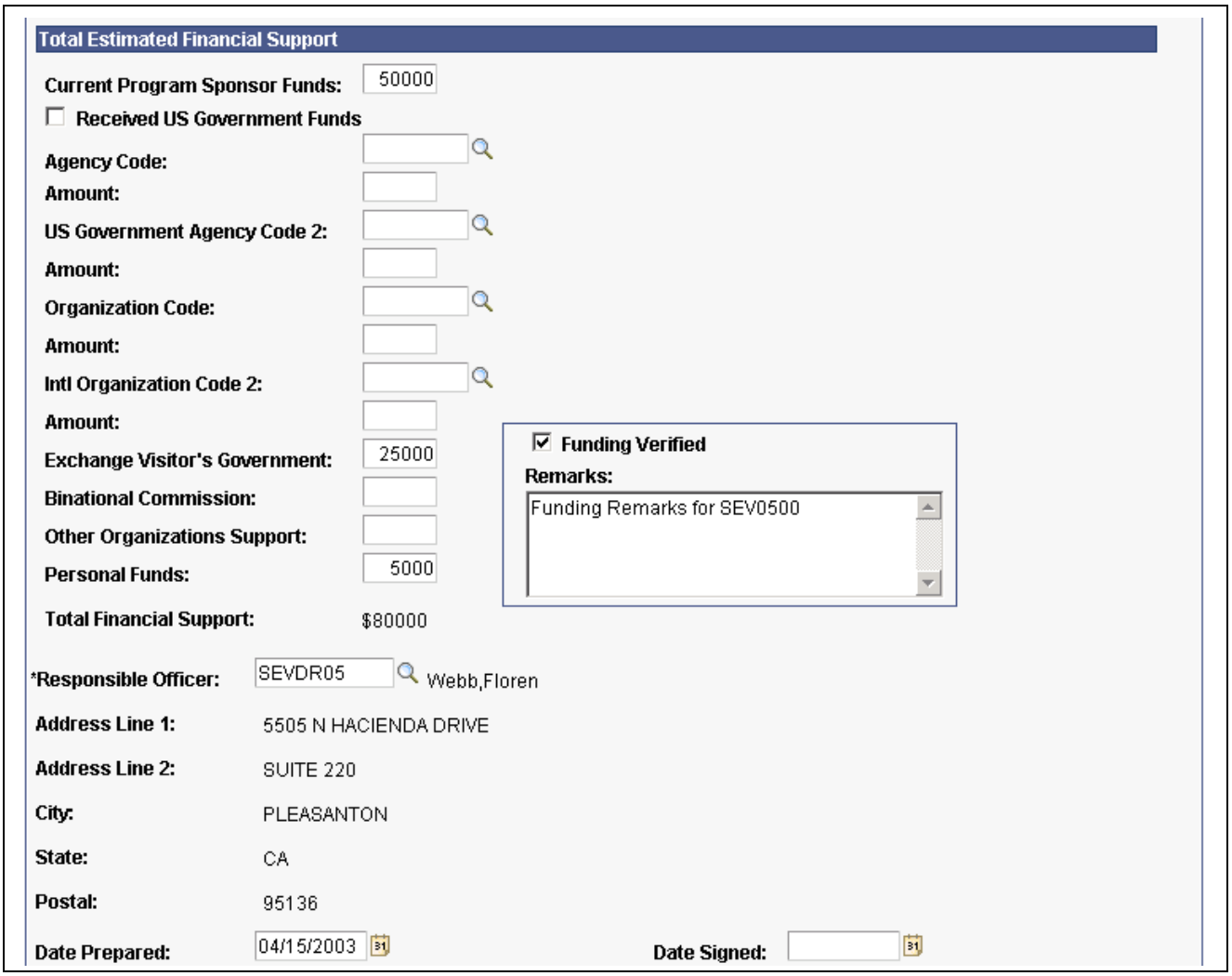
Page Name	Object Name	Navigation	Usage
DS-2019 Long Form	DS2019_FORM	Campus Community, SEVIS, DS-2019 Forms, DS-2019 Long Form	Create or update DS-2019 information for exchange visitor J visas.
Program Selection	SEV_DS_SEL_SEC	Click the Select Program Data link on the DS-2019 Form page.	Select the program to submit for a student category exchange visitor.

Entering DS-2019 Form Data

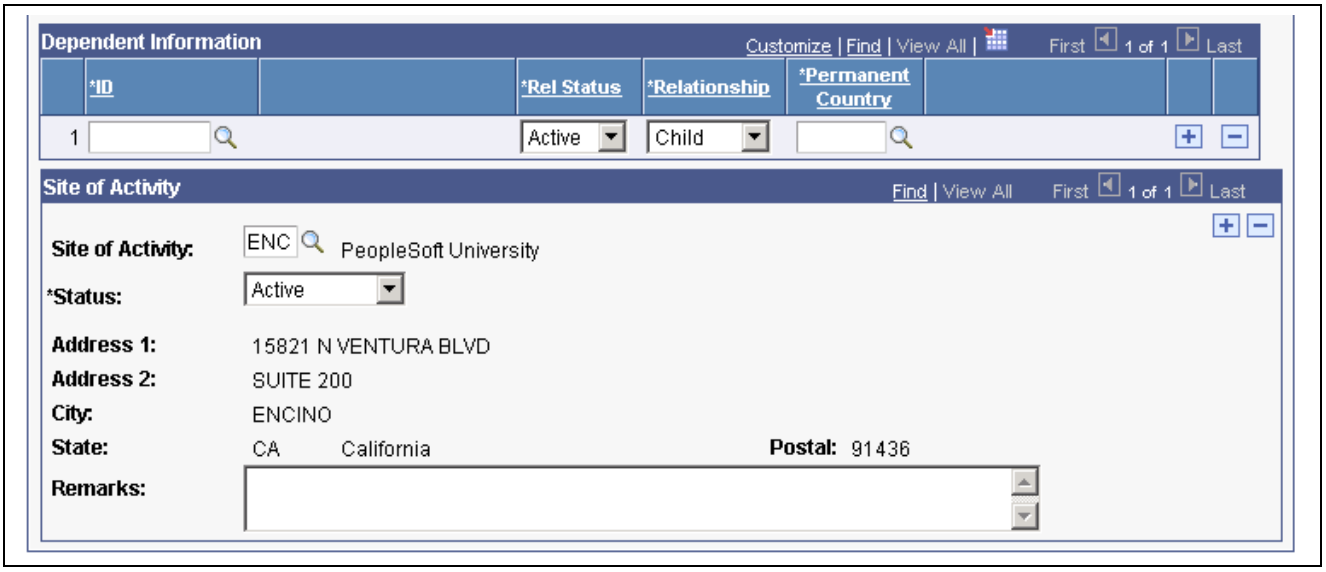
Access the DS-2019 Long Form page.



DS-2019 Long Form page (1 of 3)



DS-2019 Long Form page (2 of 3)



DS-2019 Long Form page (3 of 3)

Status Select *Active* or *Inactive.*

Only active DS-2019 form rows are included in the SEVIS Alerts - J process.

Visitors Category Select the appropriate category for the exchange visitor. The available values are: *Student Secondary, Student Associate, Student Bachelors, Student Masters, Student Doctorate, Student Non-Degree, Trainee (Speciality), Trainee (Non-speciality), Teacher, Professor, International Visitor, Alien Physician, Government Visitor, Research Scholar, Short-term Scholar, Specialist, Camp Counselor, Summer Work/Travel,* and *Aupair.*

This field is required.

Institution, Career, Acad Program (academic program), and **Admit Term** If you select any of the student categories in theVisitors Category field, the system displays the following:

- the institution entered for the student,
- the career entered for the institution,
- the academic program entered for the career, and
- the admit term entered for the student in the specified program.

Select Program Data Click to access the Program Selection page, where you can determine if more than one combination of institution, career, academic program, and admit term exists for the student.

If more than one exists, select the check box on the Program Selection page for the line that contains the appropriate information to print on the DS-2019 form.

The valid institutions for the program number and the valid careers for the institution are based on the setup of the SEVIS Program Sponsor table.

Exchange Visitor Information

Family Name, First Name, and **First Name** Displays the exchange visitor's last, first, and middle names according to the name type entered on the SEVIS Setup page.

Note. You must access the Biographical Details page of the Add/Update a Person Component and click the Names link to make any name changes.

See Chapter 21, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Entering Biographical Details, page 201.

Gender Displays the gender that is entered on the Biographical Details page.

Date of Birth Displays the birth date that is entered on the Biographical Details page.

City of Birth Displays the birth location that is entered on the Biographical Details page.

Birth Country Displays the country of birth that is entered on the Biographical Details page.

Citizenship Country Select the citizenship country to report to SEVIS.

If the exchange visitor has only one non-US citizenship country, the system displays it by default.

This field is required.

Permanent Country Select the country of permanent residence to report to SEVIS.

This field is required.

Position Code

Select the position to report to SEVIS that describes the exchange visitor in his or her home country.

This field is required.

US Address

Address 1, Address 2, City, State

Displays the exchange visitor's address based on the address type entered on the SEVIS Setup page for the U.S. address.

If this address is blank, the system reports the Program Sponsor Address in the Create EV event as the U.S. address for the exchange visitor.

Creation Reason

You can select only one reason, either *New* or *Continuing.*

If you select *New,* the *Start Date for Gen Standing PO* and *End Date* fields appear where you must enter the exchange program start and end dates.

If you select *Continuing*, the *Initial Start Date, Form Number, Start Date* and *End Date* fields appear where you must enter the exchange program's original start date and the number of the assigned IAP-66 or DS-2019 form in addition to the exchange program start and end dates.

Note. As of December, 2003, *New* is the only creation reason that can be submitted to SEVIS by way of batch processing.

Start Date and **End Date**

These fields appear when you select the creation reason of *New.* You must complete both fields for this creation reason.

Enter the date that the exchange visitor's program begins and the date that the program is to be completed.

A visitor cannot enter the U.S. more than 30 days prior to program start date. Exchange Program start date must be equal to or later than the current date. The system delivers an error if the start date is not equal to or later than the current date.

Also, the program duration cannot exceed the maximum duration of stay and cannot be less than the minimum duration of stay.

Initial Start Date and **Form Number**

These fields appear when you select the creation reason of *Continuing.* You must complete both fields for this creation reason.

Enter the original date when the exchange visitor's program began and the number of the IAP-66 or DS-2019 form assigned to the exchange visitor. This information is required.

The initial start date must pre-date the current date. The system delivers an error if the start date is not prior to the current date.

The format for the form number is X-1-12345-1234567. The system delivers an error if the format is not correct.

Subj/Field Code (subject/field code)

Enter the CIP code that represents the exchange visitor's subject or field of study.

The field is available or unavailable based on the student exchange visitor's academic plan information. For a student category exchange visitor, this information comes from the student records academic plan with the minimum

sequence number where the plan type is equal to the plan types defined for primary major on the SEVIS Setup page.

If no data exists on the student records academic plan, the information comes from student admissions academic plan. The CIP code is the code related to the Academic Plan as assigned on the Academic Plan Taxonomy table.

If the exchange visitor is a non-student program category (Professor or Research Scholar, for example), the field is available and you must select the appropriate subject/field code.

This field is required.

Comments Enter remarks to further describe the subject or field of study.

This field is required.

Total Estimated Financial Support

Current Program Sponsor Funds Enter the U.S. dollar amount of financial support provided by the program sponsor.

Received U.S. Government Funds Select to report to SEVIS that the exchange visitor has received funding from the U.S. Government.

Agency Code, U.S. Government Agency Code 2 and Amount Enter the U.S. Government organization that is providing funds to the exchange visitor, and the U.S. dollar amount of the funding they provide.

For each agency that you enter, you must also enter the amount of funding.

Organization Code, Intl Organization Code 2 and Amount Enter the international organization that is providing funds to the exchange visitor, and the U.S. dollar amount of the funding they provide.

For each organization that you enter, you must also enter the amount of funding.

Exchange Visitor's Government Enter the U.S. dollar amount of funding provided by the government of the exchange visitor's country.

Binational Commission Enter the U.S. dollar amount of funding provided by the bi-national commission of the exchange visitor's country.

Other Organizations Support Enter the total U.S. dollar amount of funding provided by all other organizations.

Personal Funds Enter the total amount of personal funds available to the exchange visitor for expenses.

Funding Verified Select this check box when the exchange visitor's funding is verified and the exchange visitor information is ready to send to SEVIS.

You must select this check box for the exchange visitor information to be processed for sending to SEVIS. Failure to select it results in the exchange visitor's information not being selected for submission to SEVIS.

An error message appears if:

- No visa type is entered for the exchange visitor.
- The visa type is not mapped to 03 on the Visa Mapping page.

Remarks Enter optional, general remarks associated with the funding information.

Responsible Officer Enter the RO/ARO responsible for the exchange visitor's record. This prompt displays only the RO/AROs assigned to the Program Sponsor on the SEVIS Program Sponsor table.

This field is required.

Address Line 1, Address Line 2, City, State, Postal Displays the address data entered in the Program Sponsor Information section of the SEVIS Program Sponsor table for the selected responsible officer.

Date Prepared Enter the date when the DS-2019 form was issued or entered.

The default date is the system date. You can modify it.

This date is informational only and is not sent to SEVIS. The DHS provides the date prepared on the DS-2019 PDF returned from SEVIS.

Date Signed Enter the date that the DS-2019 form was signed.

This date is informational only and it is not sent to SEVIS.

Dependent Information

Enter dependent information.

Warning! Do *not* delete dependent rows unless you make an error in adding the dependent's ID. If you delete the dependent ID, the dependent events are not reported to SEVIS. Change the status of the dependent to *Inactive* instead of deleting the row. If you try to delete the dependent, you receive a warning regarding the ramifications.

ID Enter the ID of each person accompanying the exchange visitor as a dependent. (Dependents must be added from the Biographical Details page in the Add/Update a Person component before you can enter them as a dependent.)

Refer to the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document for required data for each dependent.

Rel Status (relationship status) Enter the status of the dependent.

If the status is *Active,* the dependent is reported along with the exchange visitor on the Create EV event.

If you change the status to *Inactive,* the Details link appears. Click it to access the Dependent Details page where must also you enter the reason for the *Inactive* status − either an end of status reason or termination reason.

Relationship Enter the dependent's relationship to the exchange visitor. Values include: *Child* and *Spouse*.

Regulations permit only one spouse to accompany the exchange visitor during study in the U.S. If you enter more than one dependent as a spouse, you receive an error.

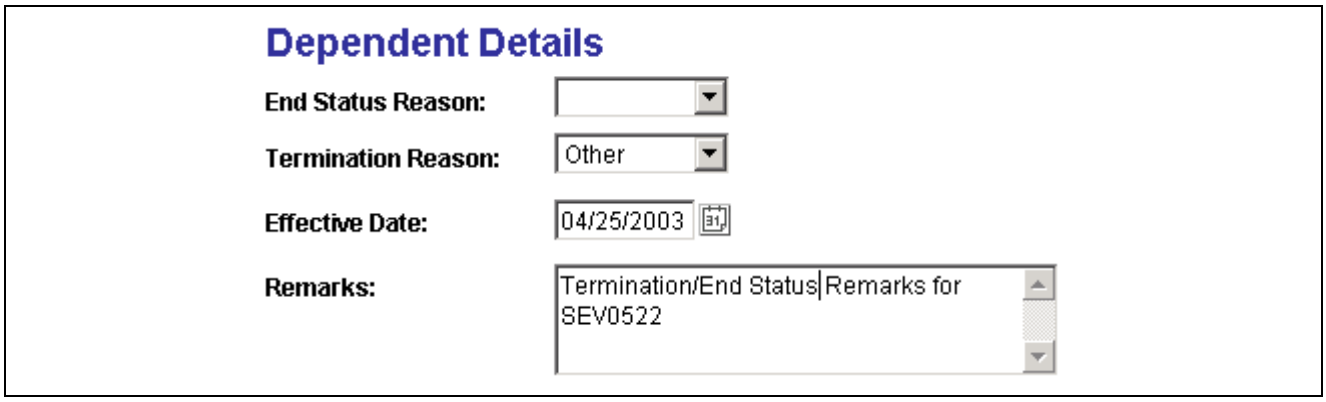
This is a required field.

Permanent Country Select the country to report to SEVIS as dependent's country of permanent residence.

This is a required field.

Dependent Details page

Access the Dependent Details page.



Dependent Details page

If you change a dependent's status to *Inactive*, you must provide either an end status reason or a termination reason. You can submit only one reason to SEVIS. The system displays an error if you attempt to enter both an end status reason and a termination reason.

End Status Reason Select the appropriate end status reason to submit to SEVIS. The valid values are: *Death, Divorce, Other,* and *Over 21*.

Termination Reason Select the appropriate termination reason to submit to SEVIS. The valid values are: *Conviction of a Crime, Unauthorized Employment,* and *Other.*

Effective Date Appears only if you enter a termination reason. Enter the termination date for the dependent.

The field is required for a termination reason.

Remarks Appears if you enter an end status reason or termination reason of *Other.* Provide an explanation for the reason entered.

This field is required an end status reason or termination reason of *Other.*

Site of Activity

Enter site of activity information.

Warning! Do *not* delete site of activity rows unless you make an error in adding the site of activity. If you delete the site of activity, the site of activity events are not reported to SEVIS. Change the status of the site of activity to *Inactive* instead of deleting the row. If you try to delete the site of activity, the system displays a warning regarding the ramifications.

Site of Activity Enter the site of activity to report to SEVIS.

The default value is the site that is set up on the SEVIS Program Sponsor table. You can add multiple sites of activity when creating an exchange visitor.

Status Enter the status of the site of activity. The default value is *Active.*

If you change the status to *Active,* the system reports an Add Site of Activity event to SEVIS.

If you change the status to *Inactive,* the system reports a Delete Site of Activity event to SEVIS.

Address 1, Address 2, City, State, Postal Displays address data for the site from the Site of Activity table.

Remarks Enter remarks to further describe the site of activity.

The system sends these remarks to SEVIS with the Add Site of Activity and Delete Site of Activity events.

Using Dependent Search

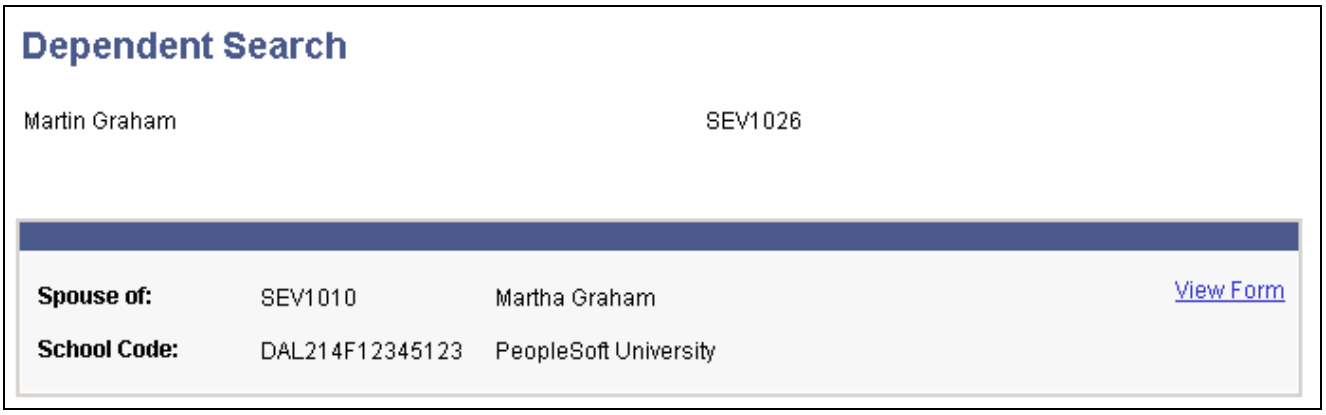
Using Dependent Search, you can search on a dependent's name to determine who the individual's primary document holder is and how the dependent and primary document holder are related. The system looks at I-20 and DS-2019 forms data to return the results of the search.

Page Used for Dependent Search

Page Name	Object Name	Navigation	Usage
Dependent Search	SEV_DEP_SRCH	Campus Community, SEVIS, Search Tools, Dependent Search	Find the primary document holder for a dependent.

Using Dependent Search

Access the Dependent Search page.



Dependent Search page

School Code or **Program Number** The page appears with either the School Code field for F and M visas or the Program Number field for J visas displayed, depending on whether the system finds I-20 form data (F or M visa) or DS-2019 form data (J visa) containing the dependent's ID.

For F and M visas, the system displays the SEVIS school code from the primary document holder's I-20 form.

For J visas, the system displays the program number of the primary document holder's DS-2019 form.

Spouse of or **Child of**

Displays the ID of the dependent's primary document holder, either *Spouse of* or *Child of*.

The field label changes to reflect the dependent's relationship to the primary document holder. For example, suppose Martin Graham, the dependent on whom you search, is the son of the primary document holder. The field label would be *Child of*.

View Form

Click to access the form (I-20 or DS-2019) where the system found the dependent's ID. The form appears on a new page in update/display mode.

If you do not have security to the school code or program number listed, this feature does not appear and you are not able to view the forms.

Running the SEVIS Alerts Process

The alerts process identifies data changes that are reportable to SEVIS, logs those changes, and copies all relevant data into the Select Alerts to Report component for review before you submit the data to SEVIS. You can set the process to run at scheduled intervals. Each time the SEVIS Alerts process runs, the SEVIS alerts data is moved to SEVIS events history and the SEVIS Alerts process records are refreshed with data from the new run of the SEVIS Alerts process.

Before you run this process again, it is recommended that you allow for the processing time required for SEVIS to return batch results. Refer to the process flow to better understand and determine when to run this process.

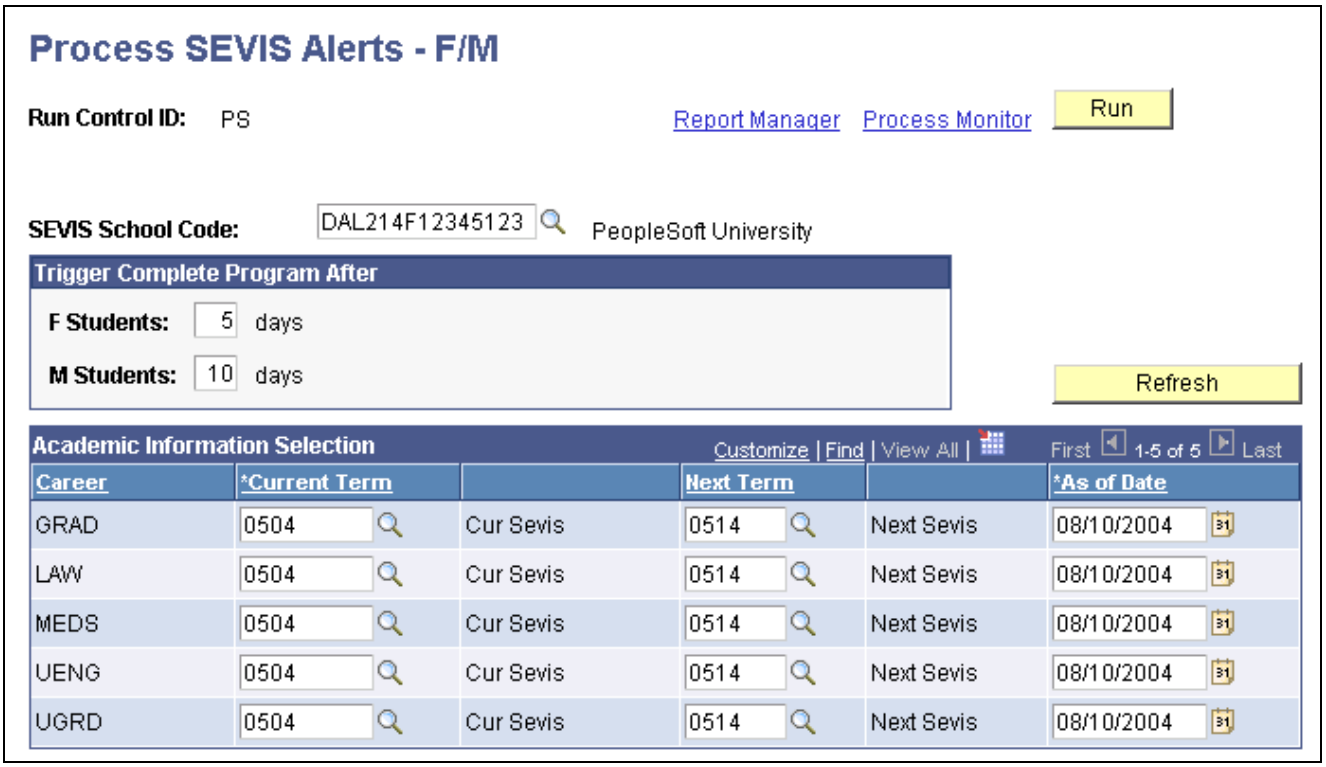
This section discusses how to run the SEVIS Alerts process.

Page Used to Run the SEVIS Alerts Process

Page Name	Object Name	Navigation	Usage
Process SEVIS Alerts - F/M, , Process SEVIS Alerts - J	RUNCTL_CCSEVCMP	• Campus Community, SEVIS, F/M Alerts, Process SEVIS Alerts - F/M, SEVIS Alerts • Campus Community, SEVIS, J Alerts, Process SEVIS Alerts - J, SEVIS Alerts	Determines the events sent to the SEVIS Alerts table and extracts the data to be sent to SEVIS for respective visas (F/M or J).

Running the SEVIS Alerts Process for F and M Visas

Access the Process SEVIS Alerts - F/M page.



Process SEVIS Alerts - F/M page

The SEVIS F/M Compare process detects changes to your international student population that should be reported to SEVIS. A unique batch ID is generated each time that the process runs. The naming scheme for this batch ID is YYYYMMDD-NNNNN, where YYYYMMDD represents the date on which the process runs and NNNNN represents the unique counter number. For example, the batch ID 20041219-00001 indicates that the process was run on December 19, 2004 and 00001 is the unique counter number. This batch ID and the SEVIS school code are keys to the records that you review on the Select Alerts to Report -F/M page.

Note. All reportable institutions and careers for the SEVIS school code must appear on this page or the data will not be reported to SEVIS. Refer to Setting up the SEVIS School Code Institution table for more information.

SEVIS School Code The system displays the SEVIS School Code and associated values for F and M visas.

Refresh Click to refresh the page with data retrieved for the specified school code .

For F and M visas data, the system populates the fields from the SEVIS School Code table and the SEVIS School Code Institution table.

Trigger Complete Program After

F students Enter the number of days after either the I-20 end date or the OPT end date has passed for a complete program event to appear on the Alerts page for an F-1 student.

The number can be between 0 and 60. If you enter 0, a complete program event never appears on the Alerts page based on the I-20 end date or OPT end date.

M students Enter the number of days after either the I-20 end date or the OPT end date has passed for a complete program event to appear on the Alerts page for an M-1 student.

The number can be between 0 and 30. If you enter 0, a complete program event never appears on the Alerts page based on the I-20 end date or OPT end date.

Academic Information Selection

Career The system displays the career when you click Refresh. You cannot edit values for the career on this page. You must make valid changes for the SEVIS school code on the SEVIS School Code Table page.

The Institution field appears only if more than one institution is mapped to the SEVIS school code.

Current Term Enter the current term for each institution and career listed.

The current term appears by default if the system date is between the term begin and end dates, and only one term is defined for the institution and career within those dates.

The current term value is used to determine the current session end date that is reported to SEVIS, and it is also used for the Registration, Auth Drop Below FC, and Resume Full Course events.

Next Term Enter the term that follows the current term for each institution and career listed.

The prompt displays all terms for which the start date is greater than the system date.

This term is used to determine the next session start date that is reported to SEVIS.

As of Date Enter the date for each institution and career listed.

The Registration, Auth Drop Below, and Resume Full Course events are triggered based on this date.

DHS regulations require that you report the Registration event within 30 days of the current term start date. You receive an error if the date that you enter does not meet the criteria.

You should update this field each time the *Current Term* and *Next Term* fields are refreshed.

When you have entered the data, click *Run* to run the process.

Note. A warning message appears if the process has been run in the past 12 hours. If any of the process's work was in progress when the SEVIS Alerts process was run again within that time period, you might lose the results of that work.

This table lists, by event, what must happen for an event to appear in the Alerts Header page for a student.

Event	Trigger Logic
Create Student	Student has an immigration status in Port of Entry Data that equals the SEVIS visa type 01 (F-1) or 02 (M-1). *OR* If the Immigration Status field is blank, the student has a visa type on Visa Permit Data that equals SEVIS visa type 01 (F-1) or 02 (M-1) where the country is USA *AND* Most recent effective-dated I-20 form has a status equal to *Active* *AND* Most recent effective-dated I-20 form, Funding Verified field equals *Y* *AND* No rows exist in SEVIS Master component for the ID and school code on the I-20 form.
Selection Criteria for All Update Events Listed Below	Student has an immigration status in Port of Entry Data that equals the SEVIS visa type 01 (F-1) or 02 (M-1). *OR* If the Immigration Status field is blank, the student has a visa type on Visa Permit Data that equals SEVIS visa type 01 (F-1) or 02 (M-1) *AND* Most recent effective-dated I-20 form has a status equal to *Active* *AND* Most recent effective-dated I-20 form, Funding Verified field equals *Y* *AND* No termination reason exists in the SEVIS Master component *OR* the Completed flag is not equal to *Y* in the SEVIS Master component.

Event	Trigger Logic
Edit Personal	There is a difference between any of the fields on SEVIS Master listed below versus the same fields on their originating records: Name type to compare against is based on the name type entered as the passport name on SEVIS Setup page. That name type is used to compare the name parts in SEVIS Master component to the name type on the Bio/Demo page. • Last Name • First Name • Middle Name • Name Suffix On the Bio/Demo page: • Birthdate • Gender • Birth Country • Citizenship Country • National ID • Taxpayer ID On the Driver's License Data page: • Drivers License Number • Drivers License State On the Visa Permit Data/Port of Entry page: • Port of Entry Admission Number • On the I-20 form: • Commuter Flag The address type for the U.S. address is based on SEVIS Setup Address Mapping page. That address type is used to compare the U.S. address in SEVIS master component to the address type on the Addresses page: • Address1 • Address2 • City • State • Postal

Event	Trigger Logic
Edit Personal (continued)	The address type for the foreign address is based on SEVIS Setup Address Mapping. That address type is used to compare the foreign address in the SEVIS master component to the address type on the Addresses page. • Address1 • Address2 • City • State • Postal • Country
Extend Program	The From Date field on the SEVIS Master component matches the From Date field on the most recent effective-dated I-20 form and To Date field on the most recent effective-dated I-20 form is greater than the To Date on the SEVIS Master component.
Defer Attendance	The From Date field on the most recent effective-dated I-20 form is greater then the From Date field on the SEVIS Master component.
Edit Student Financial	There is a difference between the data in SEVIS Master component versus the following data on the most recent effective-dated row on the I-20 form: • Months in an Academic Term • Tuition and Fees • Living Expenses • Dependent Expenses • Other Expenses • Student's Personal Funds • Funds from this School • Funds from Another Source • On Campus Employment

Event	Trigger Logic
Edit Program Info	The student's visa type is 01 (F-1). There is a difference between primary major CIP, secondary major CIP, or minor CIP in SEVIS Master component and the following data on either the Student Plan/Subplan page or the Application Program Data page. How primary major, secondary major, and minor are determined: • Check student plan or subplan first. • If no data exists there, then get the data from the application plan or subplan. Primary major, Secondary major and Minor are determined from the SEVIS Setup Page. Primary major is from the active academic plan with the minimum student career number and minimum sequence number where the plan type is equal to any of the listed Major Academic Plan Types on SEVIS Setup. Secondary major comes from the active academic plan with the second most minimum sequence number where the plan type is equal to any of the listed major academic plan types on SEVIS Setup. Minor uses either the academic plan or academic subplan where the plan types are equal to those entered on the SEVIS Setup page. The minor selected from academic subplan is the minimum sequence number with the plan type indicated related to the primary major. The minor selected from academic plan is the minimum sequence number where the plan type is equal to any of the listed minor plan types on SEVIS Setup.

Event	Trigger Logic
Complete Program	First Scenario: Student has a Program Action of *Complete,* the *Term End Date* for the Completion Term on Student Degree is less than or equal to today, and if there is OPT Employment, the End Date is less than or equal to today. Second Scenario: The appropriate F Students or M Students field is populated on the Process SEVIS Alerts F/M Page. The Term End Date on the I-20 plus the appropriate number of days entered on the Process SEVIS Alerts F/M Page is less than or equal to today's date, and if there is OPT Employment, the End Date is less than or equal to the I–20 End Date. Third Scenario: The appropriate F Students or M Students field is populated on the Process SEVIS Alerts F/M Page. There is OPT Employment. The OPT End Date is greater than the I–20 End Date and the OPT End Date plus the number of days entered on the Process SEVIS Alerts F/M Page is less than or equal to today. **Note.** Scenario numbers two and three will trigger only if the appropriate F Students or *M Students* field is populated on the Process SEVIS Alerts F/M Page.
Student Registration	The as of date on the SEVIS Alerts - F/M page is less than or equal to the date when the process is run. *AND* The current term on the SEVIS Alerts - F/M page is not equal to the term in the SEVIS Master component. *AND* There exists an active I-20 form with an admit term that has a begin date that is less than or equal to the current date. *AND* The student is currently enrolled in any institution, career, or term from the SEVIS Alerts - F/M page that is greater than or equal to the I-20 admit term. *OR* The student has a full course exception of zero units for the current term on the SEVIS Alerts - F/M Alerts page for the institution an career on the I-20 form.

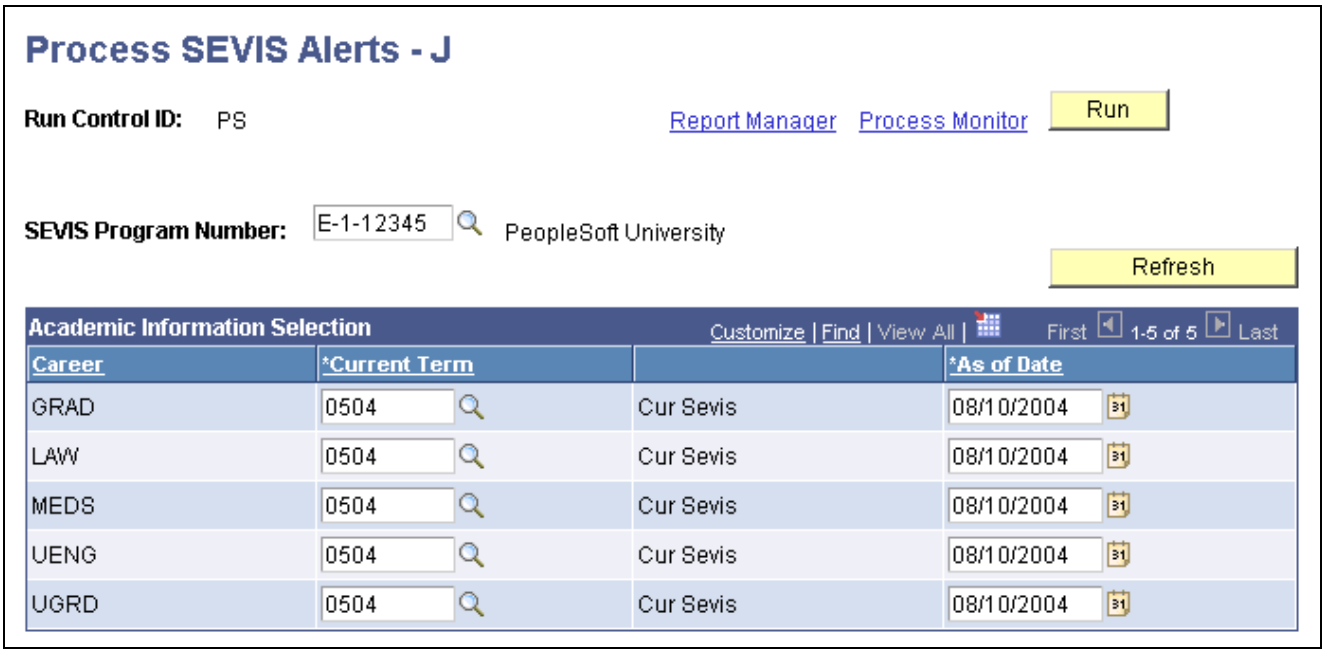
Event	Trigger Logic
Auth Drop Below FC	The as of date on the Process SEVIS Alerts − F/M page is less than or equal to the date when the process is run. The Term field is populated and the Full Course field is set to *Y* on the Registration page of the SEVIS Master component. The system determines less than full-time for a student as follows: • The total number of currently enrolled units for all institutions, careers, and current terms on the Process SEVIS Alerts F/M page is less than the minimum full time level/load rules units for the academic program on the most recent effective-dated I-20 form. • If the student's load is not full-time or no units are on record, check full course exceptions for the student where the current term equals a term indicated on the Full Course Exceptions page. Compare the total current enrolled units to the exception units. If currently enrolled units are less than exception units, the system triggers the Authorized Drop Below FC event. **Note.** You can also manually trigger this event.
Resume Full Course	The As of Date on the Process SEVIS Alerts - F/M page is less than or equal to the date that the process is run. The Term and Auth Drop fields are populated and the Full Course field is set to *No* on the Registration page of the SEVIS Master component. Full-time status is determined by: The total number of currently enrolled units for the current term on the Process SEVIS Alerts - F/M page is greater than or equal to either the full time level/load rules units for the academic program from the most recent effective-dated I-20 form *OR* the currently enrolled units is greater than or equal to exception units on Full Course Exceptions for the current term on the Process SEVIS Alerts — F/M page.
Off Campus Employ	Employment type equals Off-Campus where recommend employment equals *Y* is entered on the Employment Authorizations page and does not exist in SEVIS Master component. *OR* Rescind recommendation equals *Y* is entered on the Employment Authorizations page for Off-Campus employment and employment type equals Off-Campus where recommend employment equals *Y* and rescind recommendation is not equal to *Y* exists in the SEVIS Master component.

Event	Trigger Logic
New CPT Employ	Employment type equals *Curricular Practical Training* entered on the Employment Authorizations page and does not exist in the SEVIS Master component. Each new Curricular Practical Training sequence number added to the Employment Authorizations page that does not exist in the SEVIS Master component results in the event being triggered.
OPT Request	Employment type equals *Optional Practical Training* entered on the Employment Authorizations page and does not exist in the SEVIS Master component. Each new Optional Practical Training sequence number added to the Employment Authorizations page that does not exist in the SEVIS Master component results in the event being triggered.
Disciplinary Action	This event is manually entered on the Process SEVIS Alerts - F/M page. There is no logic to trigger the event.
Terminate Student	A Program Action equal *DISC, DISM, WADM, SPND, LEAV* or *ADRV* is entered on the Student Program page for the institution, career, and program in the SEVIS Master component, and none of the program actions exist in the SEVIS Master component, and the student has no OPT employment or the end date of the OPT Employment is less than or equal to the effective date of the program action. *OR* A program action equals *WADM, WAPP* or *ADRV* is entered on the Application Program Data page for the institution, career, and program in the SEVIS Master component, and none of the program actions exist in the SEVIS Master component, and the student has no OPT employment or the end date of the OPT Employment is less than or equal to the effective date of the program action. *OR* Event is manually entered on the Process SEVIS Alerts - F/M page.

Event	Trigger Logic
Edit Dependent Personal	For each dependent listed in the SEVIS Master component, there is a difference between the data in the SEVIS Master component and the following data: • Last Name • First Name • Middle Name • Name Suffix • Birthdate • Gender • Birth Country • Citizenship Country • Relationship on I-20 Dependents page
Add Dependent	A dependent ID on the I-20 Form - Dependents page where the relationship status equals Active and the dependent ID does not exist in the SEVIS Master component.
Terminate Dependent	The relationship status in the SEVIS Master component equals Active and the relationship status on the I-20 Form - Dependents page equals Inactive. This is reviewed for each dependent ID in the SEVIS Master component.
Reactivate Dependent	The relationship status in the SEVIS Master component equals Inactive and the relationship status on the I-20 Form - Dependents page equals Active. This is reviewed for each dependent ID in the SEVIS Master component.

Running the SEVIS Alerts Process for J Visas

Access the Process SEVIS Alerts - J page.



Process SEVIS Alerts - J page

The SEVIS J Compare process detects changes to your international exchange visitor population that should be reported to SEVIS. A unique batch ID is generated each time the process runs. The naming scheme for this batch ID is YYYYMMDD-NNNNN, where YYYYMMDD represents the date on which the process runs and NNNNN represents the unique counter number. For example, the batch ID 20041219-00001 indicates that the process was run on December 19, 2004 and 00001 is the unique counter number. This batch ID and the SEVIS program number are keys to the records that you review on the Alerts Header page for J visas.

Warning! All reportable institutions and careers for the SEVIS program number must appear on this page or the data will not be reported to SEVIS. Refer to Setting up the SEVIS Program Sponsors for more information.

SEVIS Program Number Enter the SEVIS program number for the process you want to run.

Refresh Click to refresh the page with data retrieved for the specified program number.

The system populates the fields from the SEVIS Program Sponsor table.

Academic Information Selection

Career The system displays the career when you click Refresh. You cannot edit the career on this page. You must make valid changes for the SEVIS program number on the SEVIS Program Sponsor Table page.

The Institution field appears only if more than one institution is mapped to the SEVIS program number.

Current Term Enter the current term for each institution and career listed.

The current term appears by default if the system date is between the term begin and end dates, and only one term is defined for the institution and career within those dates.

The current term value is used to used for the Validate Participant event for student category exchange visitors

As of Date Enter the date for each institution and career listed.

The Validate Participant event is triggered for student category exchange visitors based on this date.

You should update this field each time the *Current Term* and *Next Term* fields are refreshed.

When you have entered the data, click *Run* to run the process.

Note. A warning message appears if the process has been run in the past 12 hours. If any of the process's work was in progress when the SEVIS Alerts − J process was run again within that time period, you might lose the results of that work.

The table below lists, by event, what must happen in order for an event to appear on the Alerts Headers page for an exchange visitor. Unless otherwise noted, all update events in the table are for active status exchange visitors.

Events	Trigger Logic
Create Exchange Visitor	The Exchange Visitor has a Visa Type on Visa Permit Data = SEVIS Visa Type 03 (J-1) where the Country = *USA* *AND* Most recent effective-dated DS-2019 form has a status = *Active* *AND* Most recent effective-dated DS-2019 form, Funding Verified field = *Y* *AND* No rows exist in SEVIS Master component for the ID and Program Sponsor on the DS-2019 form

Events	Trigger Logic
Validate Program Participation (For Initial Status Exchange Visitors)	The exchange visitor has a Program Category = 1a, 1b, 1c, 1d, 1e or 1f. *AND* The Validated Participant Field is equal to N on the Bio/Demo page of the SEVIS Master component. *AND* The as of date on the SEVIS Alerts - J page is less than or equal to the date when the process is run. *AND* There exists an active DS-2019 form with an admit term that has a begin date that is less than or equal to the current date. *AND* The student is currently enrolled in any institution, career or term from the SEVIS Alerts - J page that is greater than or equal to the DS-2019 admit term. **Note.** You manually enter this event on the Alerts - J page if the exchange visitor is a non-student program category.
Amend Program (For Initial Status Exchange Visitors)	The Start Date or End Date on the SEVIS Master component is different than the Start Date or End Date on the most recent effective-dated DS-2019 form.

Events	Trigger Logic
Edit EV Bio	There is a difference between any of the fields on SEVIS Master component listed below versus the same fields on their originating records: Name Type to compare against is based on the Name Type entered as the Passport Name on SEVIS Setup. (That Name Type is used to compare the Name parts in SEVIS Master component to the Name Type on the Names page). • Last Name • First Name • Middle Name • Name Suffix On the Bio/Demo page: • Birthdate • Gender • Birth Country • Birth Location The Address Type for the U.S. Address is based on SEVIS Setup Address Mapping. That Address type is used to compare the U.S. Address in SEVIS Master component to the Address Type on the Addresses page: • Address1 • Address2 • City • State • Postal Most recent effective-dated row on the DS-2019 for: • Permanent Residence Country • Position Code • Citizenship Country

Events	Trigger Logic
Financial Update	There is a difference between the data on SEVIS Master component versus the following data on the most recent effective-dated row on the DS-2019 form: • Received U.S. Gov Funds • Current Program Sponsor • GovtOrg1 • GovtOrg1Amount • GovtOrg2 • GovtOrg2Amount • InternatOrg1 • InternatOrg1Amount • InternatOrg2 • InternatOrg2Amount • EV Govt • Binational Commission • Other Org • Personal Funds
EV Extension	The end date on SEVIS Master component is less than the end date on the most recent effective-dated DS-2019 form.
Update Subject Field	If the Program Category on most recent dated DS-2019 row = 1a, 1b, 1c, 1d, 1e or 1f. There is a difference between the Subject Field Code on the SEVIS Master component and the minimum student career number and minimum sequence number for the active academic plan on Student Plan where the Plan Type equals any of the plan types defined on SEVIS Setup for the Institution and Career of the student exchange visitor. If the Program Category <> 1a, 1b, 1c, 1d, 1e or 1f. There is a difference between the Subject Field Code on SEVIS Master component and the Subject Field Code on the most recent effective-dated DS-2019 form.
End Program	If the Program Category on the most recent effective-dated DS-2019 row = 1a, 1b, 1c, 1d, 1e or 1f. A program action of *Complete Program (COMP)* is entered on Student Program for the institution, career, and student career number on the SEVIS Master component, and the program action on the SEVIS Master component is not equal to COMP. **Note.** You can also enter this event manually on the Select Alerts to Report - J component for all categories of EVs.

Events	Trigger Logic
Add Site of Activity	A Site of Activity with a status of *Active* exists on the most recent effective-dated DS-2019 form that does not exist on SEVIS Master component.
Delete Site of Activity	A Site of Activity with a status of *Inactive* exists on the most recent effective-dated DS-2019 form and the same Site of Activity has a status of *Active* on SEVIS Master component.
Add Dependents	A Dependent ID exists on the most recent effective-dated DS-2019 form, Dependents page where the Relationship Status = *Active* and the Dependent ID does not exist on SEVIS Master component.
Dependent End Status	The Relationship Status on the most recent effective-dated DS-2019 Form, Dependents page = *Inactive* and an End Status Reason is populated. On SEVIS Master, The Relationship Status for the Dependent ID on SEVIS Master component = *Active*. This is reviewed for each Dependent ID on the SEVIS Master.
Terminate Dependent	The Relationship Status on the most recent effective-dated DS-2019 Form, Dependents page = *Inactive* and a Termination Reason is populated. On the SEVIS Master component, The Relationship Status for the Dependent ID on the SEVIS Master component = *Active*. This is reviewed for each Dependent ID on the SEVIS Master.
Edit Dependent Personal	For each dependent listed on the SEVIS Master component, there is a difference between the data on SEVIS Master versus the following data: • Last Name • First Name • Middle Name • Name Suffix • Birthdate • Birth Location • Gender • Birth Country • Citizenship Country • Relationship on DS-2019 Dependents page • Permanent Residence Country on DS-2019 Dependents page.
Correct Infraction	Manual event only to be entered on Select Alerts to Report - J.

Events	Trigger Logic
Terminate EV	Manual event only to be entered on Select Alerts to Report - J.
EV Matriculation	Manual event only to be entered on Select Alerts to Report - J.

Viewing SEVIS Alerts Process Data

Review the events triggered for each student or exchange visitor after running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process. Only the rows with *Send to SEVIS* selected are extracted. Any data entered in the *Additional Data* field is lost if it is not extracted before running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process. Therefore, you should complete the review of events and run the extract process to create the XML file to send to SEVIS before running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process again for that visa type. Refer to the process flows at the beginning of this document to better understand when to run this process.

If an event has no errors and requires no additional data, the *New Form* and *Send to SEVIS* field values appear as *Yes* by default so that you do not have to manually select these fields. You can click *Clear All to set Send to SEVIS* to *No* so that you can individually determine which events to submit to SEVIS. Clicking *Check All* sets *Send to SEVIS* to *Yes* for all events where there are no errors or additional data to be entered.

By using the SEVIS school code and batch ID for F and M visas, or the SEVIS program number and batch ID for J visas, you are also able to review errors, enter additional data, and indicate if the event should be submitted to SEVIS. You can also indicate if a new I-20 or new DS-2019 form, respectively, is needed for the individual. The SEVIS school code and batch ID information are keyed to the data on the Select Alerts to Report - F/M component for F and M visas and the SEVIS program number and batch ID information are keyed to the data on the Select Alerts to Report - J component for J visas. The batch ID is a unique number generated by the alerts process. Access to the Select Alerts to Report — F/M component or Select Alerts to Report — J component is controlled through school code security or program sponsor security.

This section discusses how to:

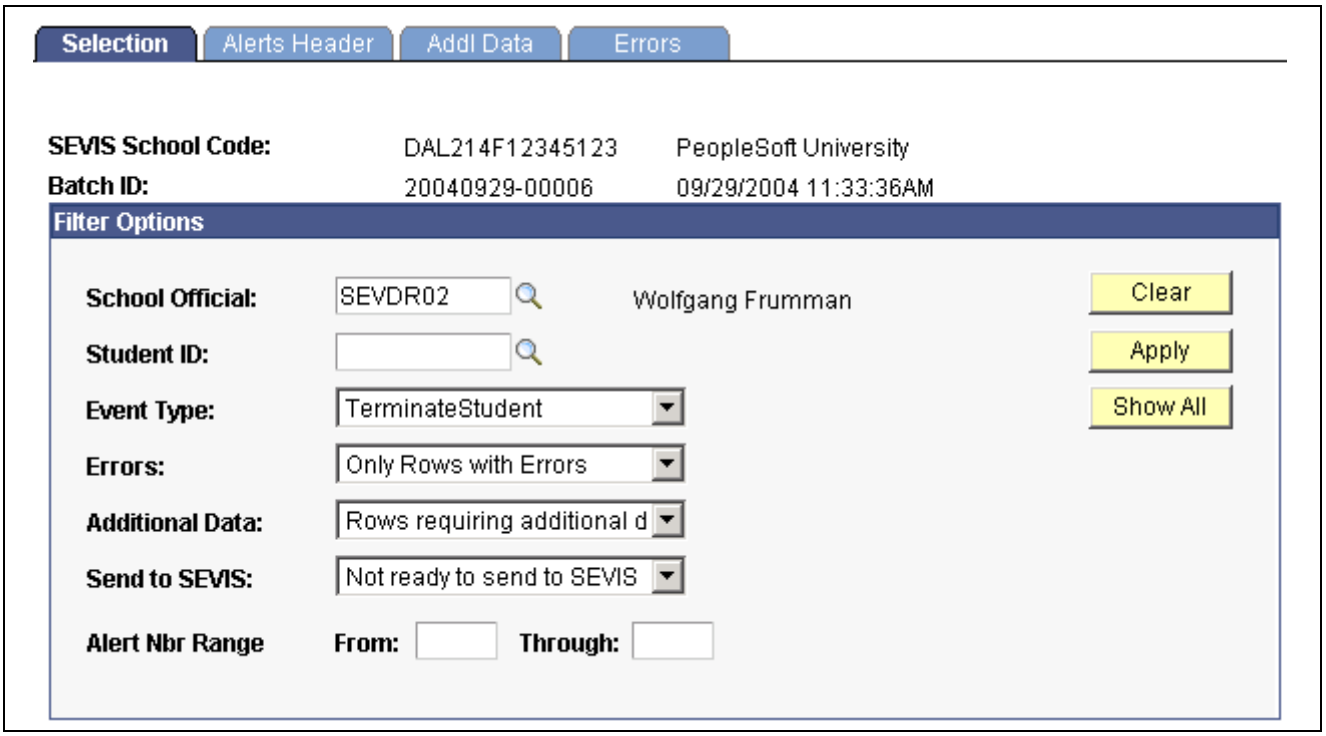
- Select data to review.
- Review alerts data.
- Enter additional data for an event.
- View event errors data.

Pages Used to View SEVIS Alerts Process Data

Page Name	Object Name	Navigation	Usage
Selection	SEV_REV_U_FILTER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Selection • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Selection	Select data to review.
Alerts Header	SEV_ALERT_HEADER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Alerts Header • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Alerts Header	Review data on alerts page.
Addl Data (additional data)	SEV_REV_FMUPD	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Addl Data • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Addl Data	Enter any additional data required for this event.
Errors	SEV_REV_U_ERRORS	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Errors • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Errors	View event errors.
Message Explanation	SEV_REV_ERR_EXPL	Click More on the Errors page.	Review the error message information.

Selecting Data to Review

Access the Selection page.



Selection page

If you have a large number of events to view, you can filter the data based on the options listed here.

SEVIS School Code or **SEVIS Program Number** — The page displays either the SEVIS School Code and associated fields, or the SEVIS Program Number and associated fields, depending on the menu navigation that you select.

Filter Options

Clear — Click to clear the data in the *Filter Options* fields.

Apply — Click to filter the alerts results based on the data entered in *Filter Options* fields.

Show All — Click to show all of the events on the Alerts Header page if you have previously filtered the data. (You do not need to select this option unless you have previously entered data in the *Filter Options* fields but now want to see all the events.)

School Official or **Responsible Officer** — For the F and M visas school official, enter the DSO assigned to the students who appear on the Alerts Header page. The prompt displays all DSOs defined on the SEVIS School Code Table page for the SEVIS school code listed.

For J visas responsible officer, enter the RO/ARO assigned to the exchange visitors who appear on the Alerts Header page.

Student ID or **Exchange Visitor** — For the F and M visas student ID, enter the student's ID (emplID) whose events you want to review. The prompt displays all IDs that have events.

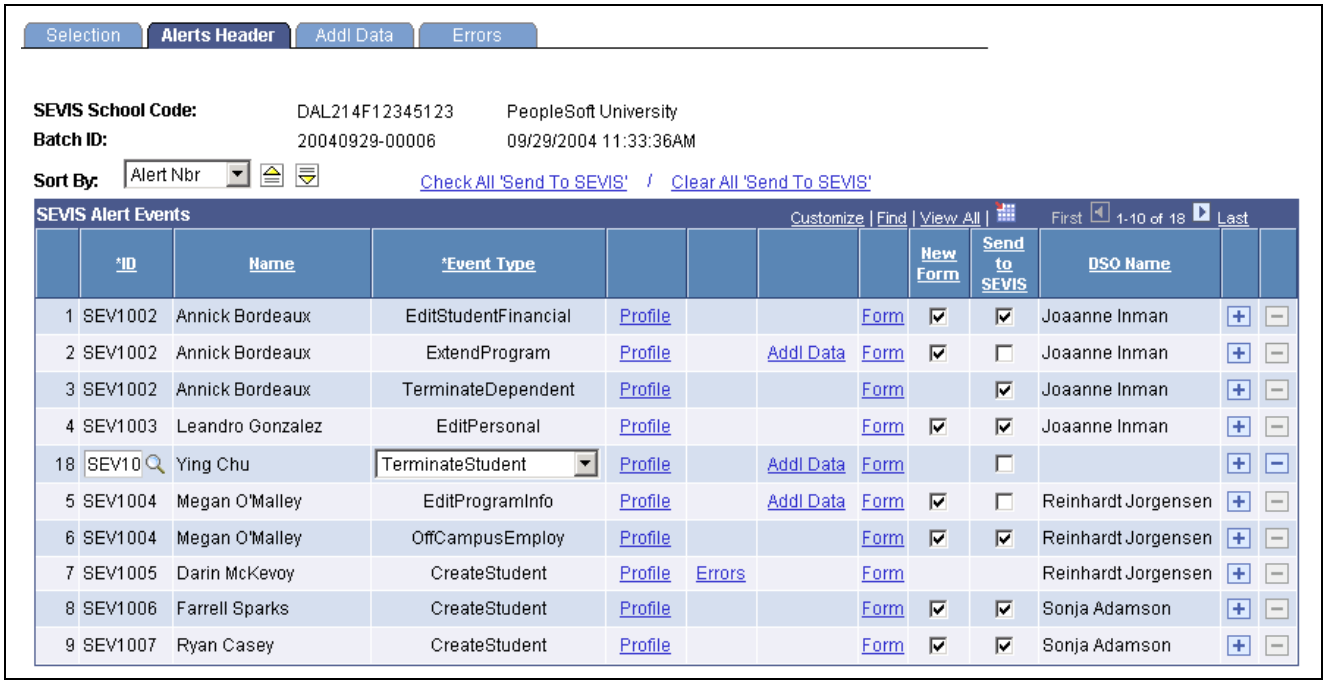
For the J visas exchange visitor, enter the exchange visitor's ID (emplID) whose events you want to review.

Event Type — Select a specific event to review.

Errors	Select to review events that have errors or events that have no errors.
Additional Data	Select to review events requiring additional data or events that require no further editing.
Send to SEVIS	Select to review events where the *Send to SEVIS* field is *Yes*, or to review events where the *Send to SEVIS* field is *No*.
Alert Nbr Range (alert number range)**From** and **Through**	A unique alert number is assigned for each event row for each Batch ID. To review events within a range, enter the first and last alert number in the range.

Reviewing Alerts Data

Access the Alerts Header page.



Alerts Header page

This page lists the events triggered by running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process. You indicate whether to submit the event to SEVIS and whether you want to receive a new I-20 or DS-2019 form. Only the events with *Send to SEVIS* selected are submitted to SEVIS during the Export SEVIS Events - F/M or Export SEVIS Events - J process. All of the events without errors are moved to the View SEVIS Events History pages each time the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process is run.

You can also add a row to manually enter an event. You can add a manual event only for a student with a SEVIS ID for the school code on the page or for an exchange visitor with a SEVIS ID for the program number on the page.

You can manually enter the following events for F/M visas: *AuthDropBelowFC, DisciplinaryAction,* and *TerminateStudent.*

You can manually enter the following events for J visas: *EVMatriculation, EndProgram, CorrectInfraction, TerminateEV,* and *ValidateParticipant.*

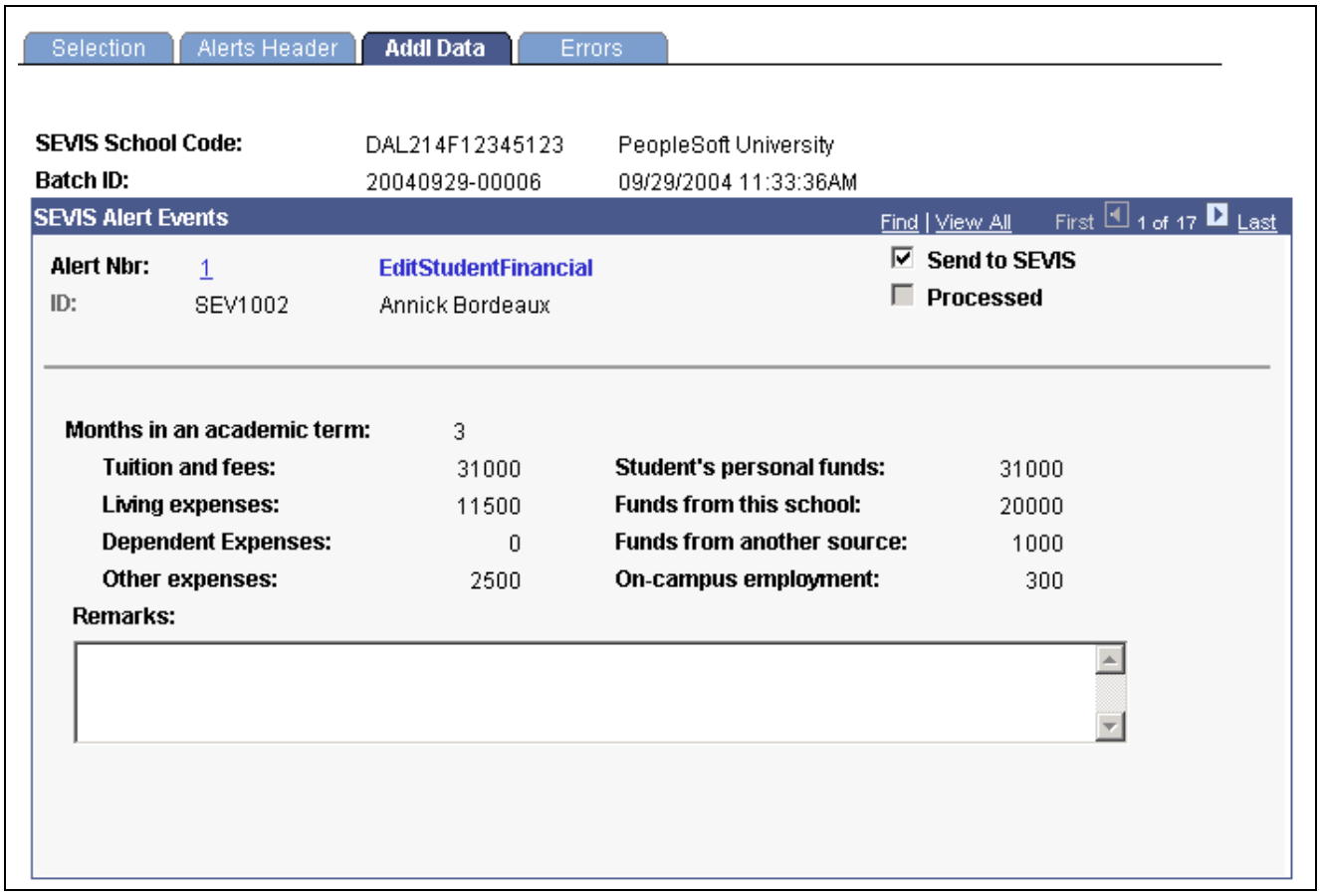
SEVIS School Code or **SEVIS Program Number**	The page displays either the SEVIS School Code and associated fields, or the SEVIS Program Number and associated fields, depending on the menu navigation that you select.
Check All 'Send To SEVIS'	Click to set all the Send to SEVIS check boxes to *Yes*. Only events that have no errors and need no additional data are selected.
Clear All 'Send To SEVIS'	Click to set all of the Send to SEVIS check boxes to *No*.

SEVIS Alert Events

Profile	Click to open a new window displaying the Add/Update a Person component in update/display mode.
Errors	Click to view the Errors page.
Addl Data	Click to view the Additional Data page.
Form	Click to open the I-20 or DS-2019 form in update/display mode.
New Form	Select to request a new I-20 for DS-2019 form.
Send to SEVIS	Select if the event data is ready to export to SEVIS through the Export SEVIS Events - F/M or Export SEVIS Events - J process.

Entering Additional Data for an Event

Access the Addl Data page.



Addl Data (additional data) page

The page appears with the SEVIS School Code and associated F and M visas information, or the SEVIS Program Number and associated J visas information depending on the menu navigation you that selected. Data on this page changes based on the event.

If the Additional Data link appears for an event on the Alerts Header page, click it navigate to this page where you can enter additional data to submit to SEVIS.

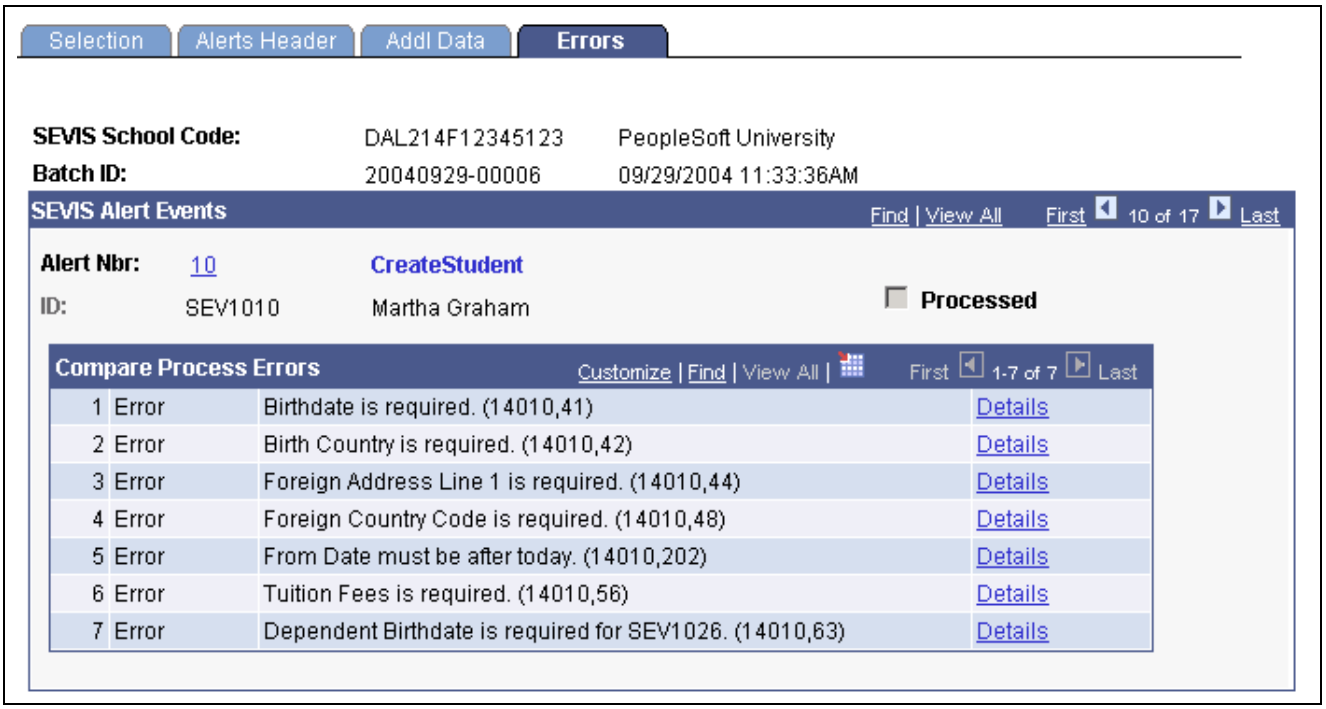
The F and M visas events containing additional data are: *Edit Program Info, Disciplinary Action, Terminate Student, Auth Drop Below FC, Complete Program, Extend Program, Defer Attendance,* and *Resume Full Course.* The *Disciplinary Action, Terminate Student* and *Auth Drop Below FC* events have additional data that is required before the Send to SEVIS check box can be selected.

The J visas events containing additional data are: *Edit EV Bio, Update Subject/Field, Amend Program, EV Extension, EV Matriculation, Correct Infraction, Terminate EV, End Program, Edit Dependent Personal, Terminate Dependent, Dependent End Status,* and *Add Dependent.* The *EV Matriculation, Terminate EV, Correct Infraction,* and *End Program* events have additional data that is required before the Send to SEVIS check box can be selected

Once you have entered the additional data and are ready to submit the event to SEVIS, select the Send to SEVIS check box on this page or on the Alerts Header page, and save.

Viewing Event Errors Data

Access the Errors page.



Errors page

The page appears with the SEVIS School Code and associated F and M visas information, or the SEVIS Program Number and associated J visas information depending on the menu navigation that you selected.

If the Error link appears for an event on the Alerts Header page, you can click it to navigate to this page where errors for the event are listed. You must correct the data error before the event can be submitted to SEVIS. Most of the errors indicate that required data is missing for the student/exchange visitor or dependent. If the missing data is for a dependent, the ID of the dependent is listed in the error. Refer to the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document for a listing of required fields by event.

Select the *More* link to view additional detail regarding an error.

Viewing Event History Information

The system provides a listing by ID of each event from the Select Alerts to Report - F/M and Select Alerts to Report - J components that did not contain errors. This provides a historical tracking of the events triggered by the Process SEVIS Alerts - FM and Process SEVIS Alerts - J SEVIS Alerts process and the events submitted to SEVIS. You can view the data sent to SEVIS and the results of the processing by SEVIS.

This section discusses how to:

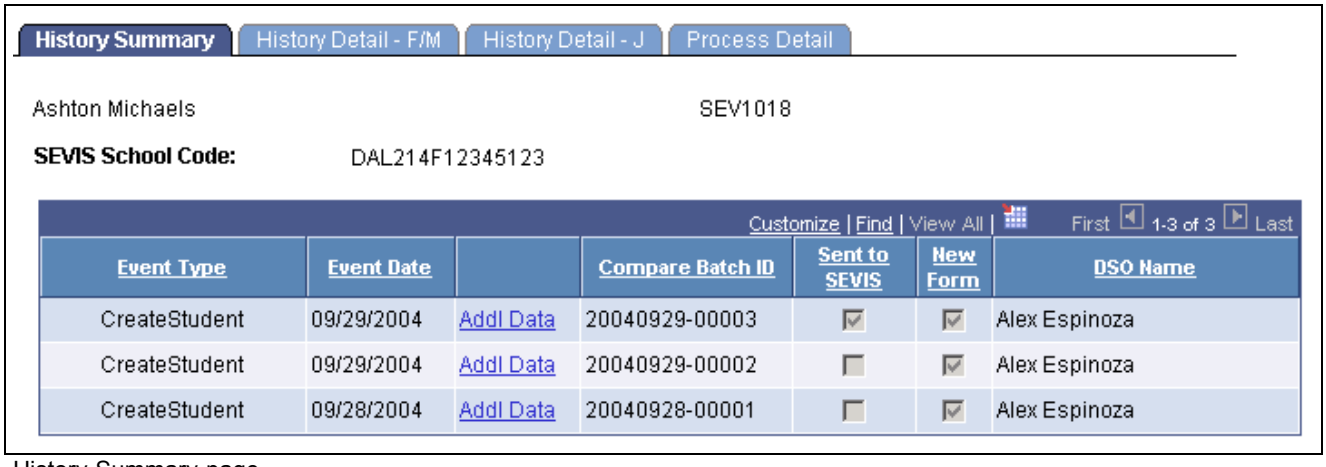
- View the event history summary.
- View event history detail information.
- View event process details.

Pages Used to View Event History Information

Page Name	Object Name	Navigation	Usage
History Summary	SEV_HIST_SUMMARY	Campus Community, SEVIS, View SEVIS Events History, History Summary	View a listing of events without errors that have triggered for a student or exchange visitor.
History Detail - F/M, History Detail - J	SEV_HIST_DETAIL	• Campus Community, SEVIS, View SEVIS Events History, History Detail - F/M • Campus Community, SEVIS, View SEVIS Events History, History Detail - J	View the data for each event for F and M visa holders or for J visa holders.
Details	SEV_HST_I_CRE_SEC	Click the Details link on the History Detail - F/M or the History Detail - J page.	View additional data from the event.
SEVIS Alerts Addresses	SEV_REV_U_ADD_SEC	Click the Addr Info link on the History Detail - F/M or the History Detail - J page.	View address data related to the event.
Process Detail	SEV_HIST_DWN_RSLT	Campus Community, SEVIS, View SEVIS Events History, Process Detail	View the results of the processing by SEVIS.

Viewing the Event History Summary

Access the History Summary page.



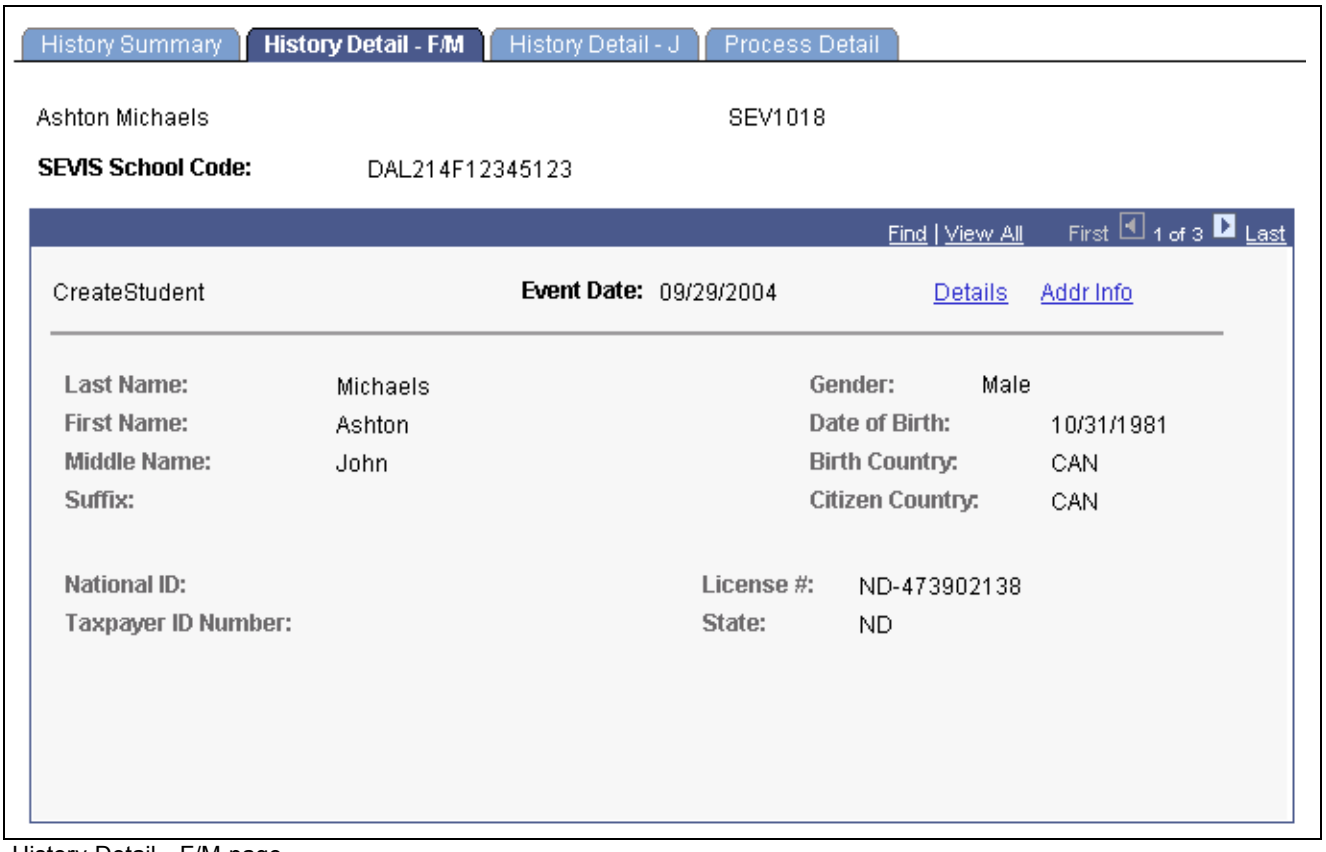
History Summary page

All events on the Select Alerts to Report - F/M or Select Alerts to Report - J Header page that do not have errors are listed here. The history summary data is populated each time the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process is run. The date that the event is triggered, the batch ID, and the DSO assigned to the student on the I-20 form for F and M visas or the RO/ARO assigned to the exchange visitor on the DS-2019 for J visas, appear along with the additional information listed here.

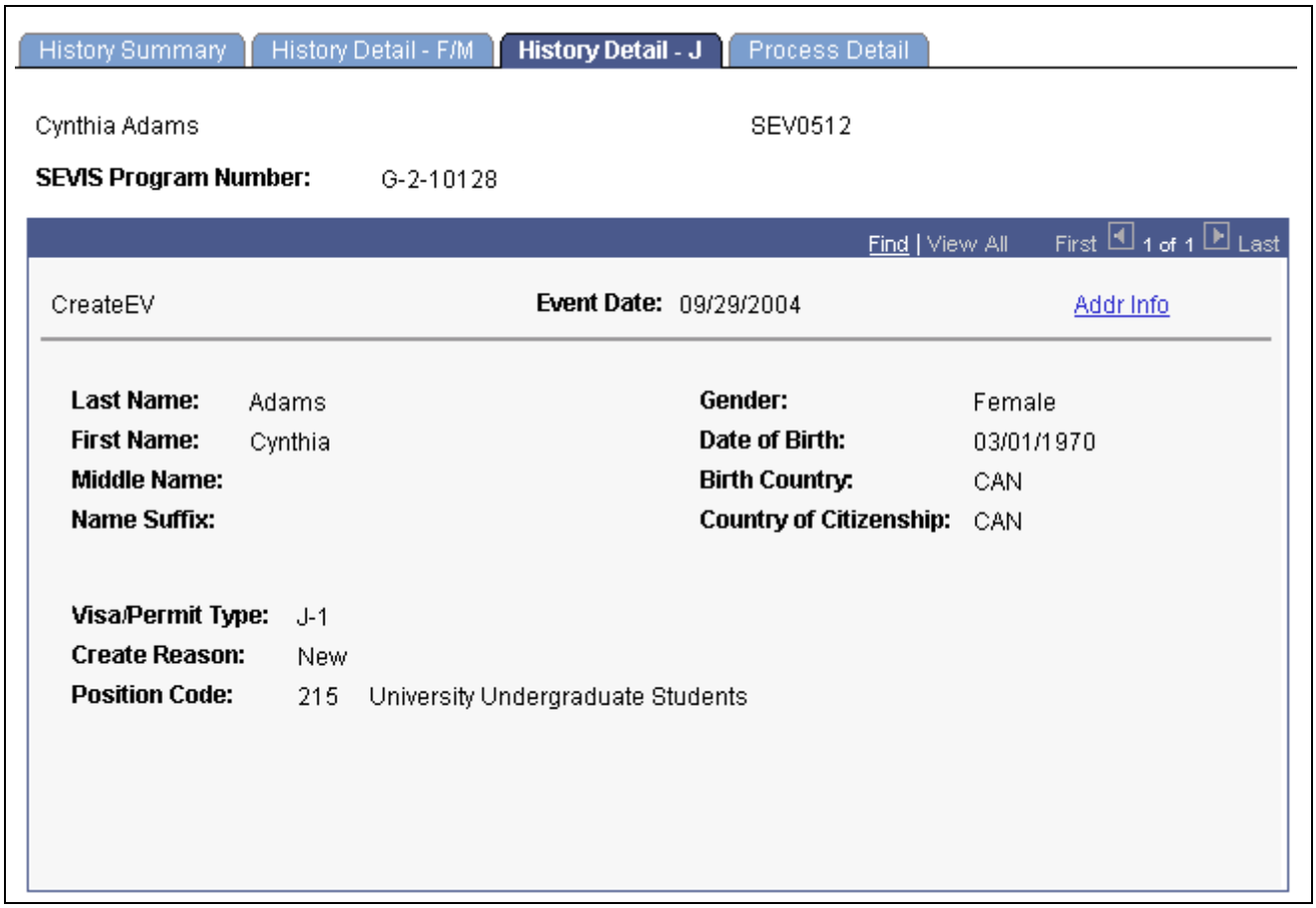
SEVIS School Code or **SEVIS Program Number**	The system displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas, depending on the visa type for which the process was most recently run.
Addl Data (additional data)	Click this link to access the History Detail page where you can view the data extracted for the event. From the History Summary page for F and M visas, the link takes you to the History Detail - F/M page. From the History Summary page for J visas, the link takes you to History Detail - J page.
Sent to SEVIS	The system selects this check box if the event is extracted and submitted to SEVIS, which is triggered by the selection of the*Send to SEVIS* check box for the event on the Alerts Header page. This field is display only.
File Error	Click this link to view the error information received from SEVIS generated during processing the event. This link appears only if an error is received from SEVIS.
New Form	The system selects this check box if a new form was requested for the event on the Alerts Header page. This field is display only.

Viewing Event History Detail Information

If you ran the Process SEVIS Alerts - F/M process, access the History Detail - F/M page. If you ran the Process SEVIS Alerts - J process, access the History Detail - J page.



History Detail - F/M page



History Detail - J page

Data on the detail pages varies depending on the visa type and the event. Refer to the DHS *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface* document for a listing of data elements sent for each event.

Details

Click this link to view additional data extracted for the event.

This link appears for F and M visas create student event only.

Addr Info (address information)

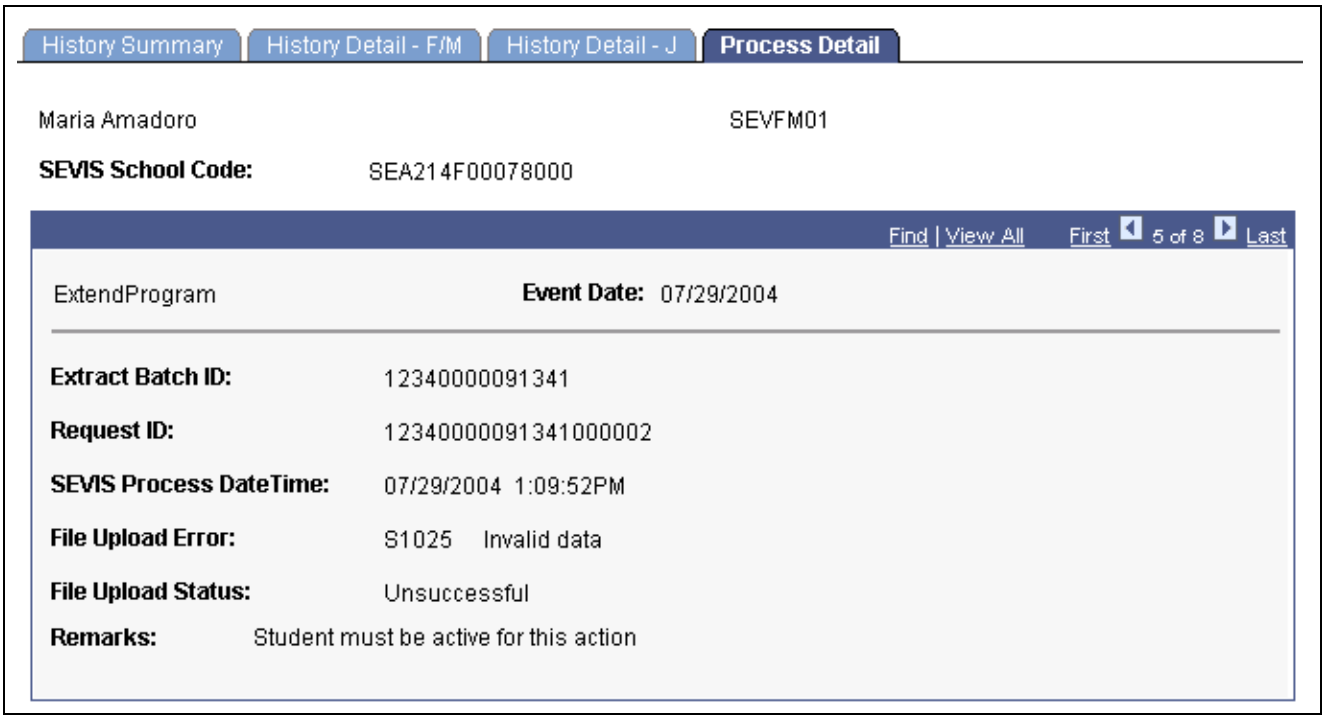
Click this link to view the foreign (F or M visa only) and U.S. address data extracted for the event.

For F and M visas, this link appears only for the Create Student, Edit Personal, and Student Registration events.

For J visas, this link appears only for the Create EV, Edit Personal, and Student Registration events.

Viewing Event Process Details

Access the Process Detail page.



Process Detail page

If the Sent to SEVIS check box on the History Summary page is selected and the SEVIS import results are processed for the event, you can view the results of the import on the Process Detail page. The data elements displayed here appear from the Student-Dependent Transaction log or the Exchange Visitor-Dependent Transaction log, which is returned and processed by the Import process.

SEVIS School Code or **SEVIS Program Number**
The system displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas, depending on the visa type for which the process was most recently run.

Extract Batch ID
Displays the ID number provided in the upload extract file.

This is a unique number for each extract created by the SEVIS Export process (Export SEVIS Events - F/M process or Export SEVIS Events - J process).

Request ID
Displays the identifier used by your school to define the specific record in the upload extract file.

This is a unique number for each event created by the SEVIS Export process (Export SEVIS Events - F/M process or Export SEVIS Events - J process).

SEVIS Process Date Time
Displays the date and time that the record was processed by SEVIS.

File Upload Error
If the event does not load successfully to SEVIS, this field shows the error code returned during the processing of the individual record.

File Upload Status
If the event loads successfully to SEVIS, this field value is *Successful*.

If the event does not load successfully to SEVIS, this field value is *Unsuccessful*.

In the latter case, you must correct the error and resubmit it to SEVIS. When you run the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process for that visa type, the system triggers the event again and sends it to Select Alerts to Report - F/M or Select Alerts to Report - J for review.

Note. It is important that you correct the data before the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process for that visa type is run again or you will send the event again to SEVIS with the error.

Remarks If the event does not load successfully to SEVIS, this field provides a text description of the error code returned during the processing of the individual record.

Generating an XML File to Send to SEVIS

You must run an XML extract process to create the data files in the format that SEVIS requires.

This section discusses how to generate an XML file to send to SEVIS.

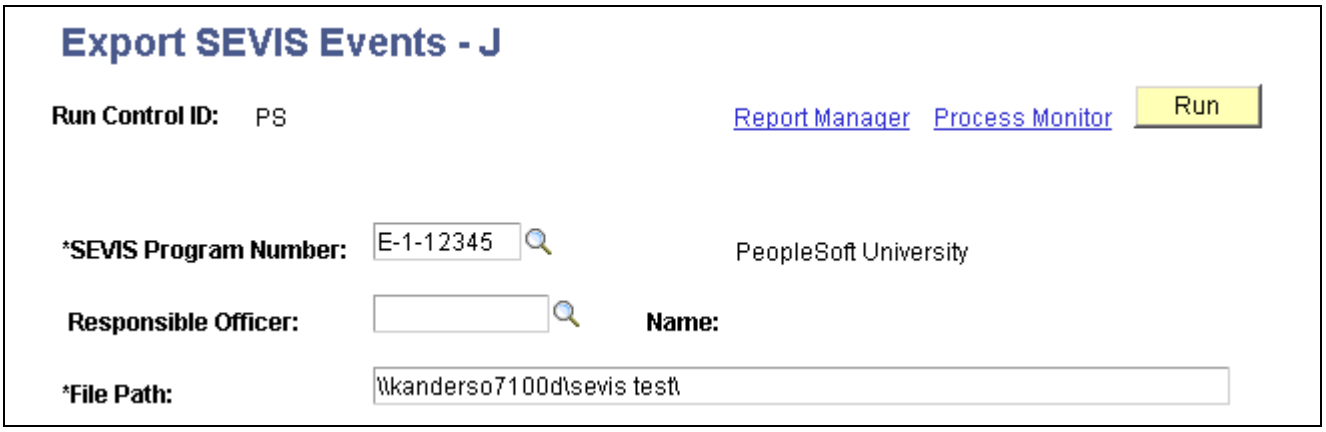
Pages Used to Generate an XML File to Send to SEVIS

Page Name	Object Name	Navigation	Usage
Export SEVIS Events - F/M	RUNCTL_SEV_EXTRACT	Campus Community, SEVIS, F/M Alerts, Export SEVIS Events - F/M	Generate the XML file of F and M visas data for transmission to SEVIS.
Export SEVIS Events - J	RUNCTL_SEV_EXT_J	Campus Community, SEVIS, J Alerts, Export SEVIS Events - J	Generate the XML file of J visas data for transmission to SEVIS.

Generating the XML File

Access the Export SEVIS Events - F/M page for F/M visas processing, or access the Export SEVIS Events - J page for J visas processing.

Export SEVIS Events - F/M page



Export SEVIS Events - J page

The SEVIS Extract Process (either Export SEVIS Events - F/M or Export SEVIS Events - J) extracts data into an XML document that is compliant with the SEVIS Create Update Student or Create Update Exchange Visitor schema. It contains relevant data for all students and exchange visitors on the Alerts Header page for which the Send to SEVIS check box is selected.

The extracted XML document is created using a 30-character file name with the SEVIS extract batch ID and the SEVIS school code for F/M visas or the SEVIS program number for J visas. For example, 00000000005DAL21400078230.xml where the 00000000005 is the SEVIS extract batch ID and DAL21400078230 is the SEVIS school code.

Note. The SEVIS system currently accepts XML documents with names no longer than 30 characters, including the .xml file extension. The XML file produced by the export process does not display the first three characters of the extract batch ID.

The SEVIS extract batch ID value is recorded on the Installation Defaults - CC page. The extract process controls and sequentially numbers the extract batch ID value with each new run.

PeopleSoft delivers the SEVIS extract batch ID value set to 00000000000000 and the field is set to display-only on the Installation Defaults - CC page.

Warning! Exercise extreme care if you update the SEVIS extract batch ID value. The batch ID value is an important key to SEVIS batch XML documents. PeopleSoft Enterprise Campus Solutions controls the SEVIS extract batch ID value. The SEVIS system requires sequential numbering of batch IDs for processing. Your XML document transmissions to SEVIS must follow a sequential batch ID number progression. The SEVIS system does not process files that arrive out of order.

SEVIS School Code or **SEVIS Program Number**

For F and M visas, enter the SEVIS school code of the data to be exported.

For J visas, enter the SEVIS program number of the data to be exported.

DSO EmplID (designated school official employee ID) or **Responsible Officer**

For F and M visas, enter the ID of the assigned DSO for the data to export.

For J visas, enter the ID of the assigned responsible officer (RO) or assistant responsible officer (ARO) of the data to export.

This field is optional for either visa type, and is used to limit the export file to only those individuals whose current form (I-20 or DS-2019) is associated with the specified responsible ID (DSO or RO/ARO). Depending on business processes, if your institution has multiple responsible IDs, you might find it useful to limit the XML data files to a specific ID. This can assist with

the organization and review of transaction log results and forms received from SEVIS.

File Path Enter the path to the destination where you want the system to place the export file created.

Downloading and Viewing SEVIS Results

Before you can view results from SEVIS, you must complete the upload of the XML documents to SEVIS, the download of the XML transaction log, and the download of PDF files from SEVIS (I-20 PDF files for F and M visas or DS-2019 PDF files for J visas) using the utility program of your choice that supports SSL and HTTPS. Many utility programs (freeware, shareware, and licensed) support SSL and HTTPS data transmissions.

Consult the *Interface Control Document for the Student and Exchange Visitor Information System Batch Interface*document and batch interface testing documentation provided by the DHS for digital certificate and batch file transmission instructions.

After you send the XML file to SEVIS, you receive an acknowledgment from SEVIS to verify that the information was received. You also receive the processed results of the data file and PDF format files for printing the forms.

This section discusses how to:

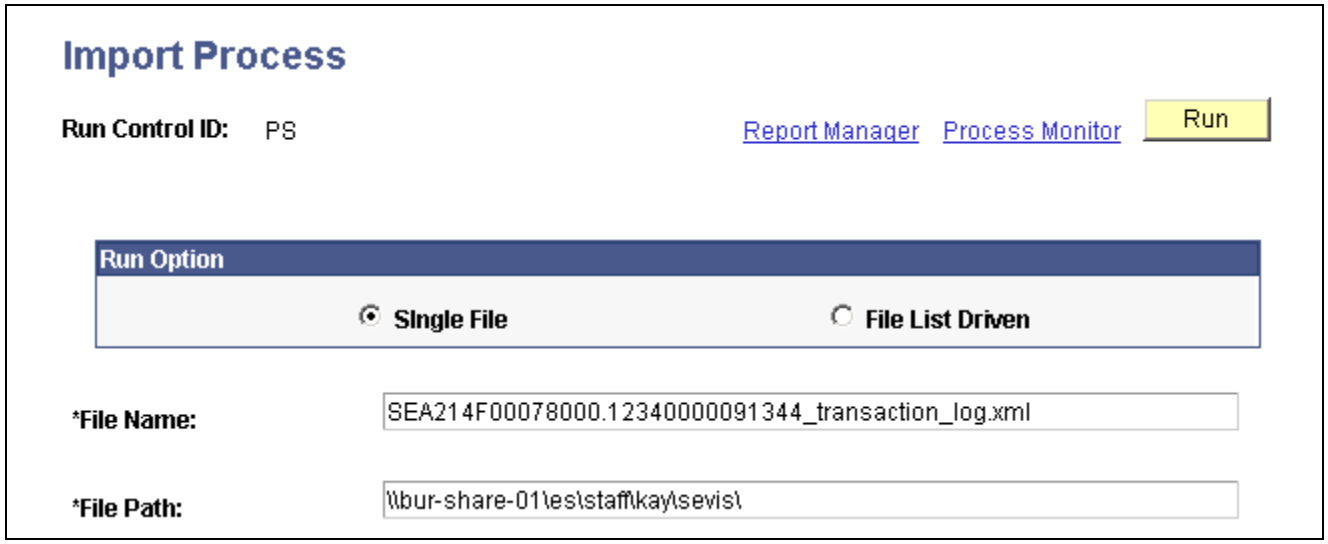
- Download SEVIS import results.
- View results of the XML upload to SEVIS.
- View results of the SEVIS download.
- View individual student or exchange visitor record results.
- View individual dependent record results.

Pages Used to Download and View SEVIS Results

Page Name	Object Name	Navigation	Usage
Import Process	RUNCTL_SEV_DOWNLD	Campus Community, SEVIS, SEVIS Import, Import Process	Enter SEVIS Download process parameters to import the acknowledgement file and results file from SEVIS.
File Upload Result	SEV_UPLOAD_RSLT	Campus Community, SEVIS, SEVIS Import, Import Results, File Upload Results	Review the acknowledgement file.
Download Results	SEV_DOWNLD_RSLT	Campus Community, SEVIS, SEVIS Import, Import Results, Download Results	Review the transaction log results file.
Student/EV (student/exchange visitor)	SEV_DOWNLD_RSLT2	Campus Community, SEVIS, SEVIS Import, Import Results, Student/EV	Review the individual transaction record results for a student (F and M visa) or exchange visitor (J visa).
Dependents	SEV_DOWNLD_RSLT3	Campus Community, SEVIS, SEVIS Import, Import Results, Dependents	Review the individual transaction record results for a dependent.

Downloading SEVIS Import Results

Access the Import Process page.



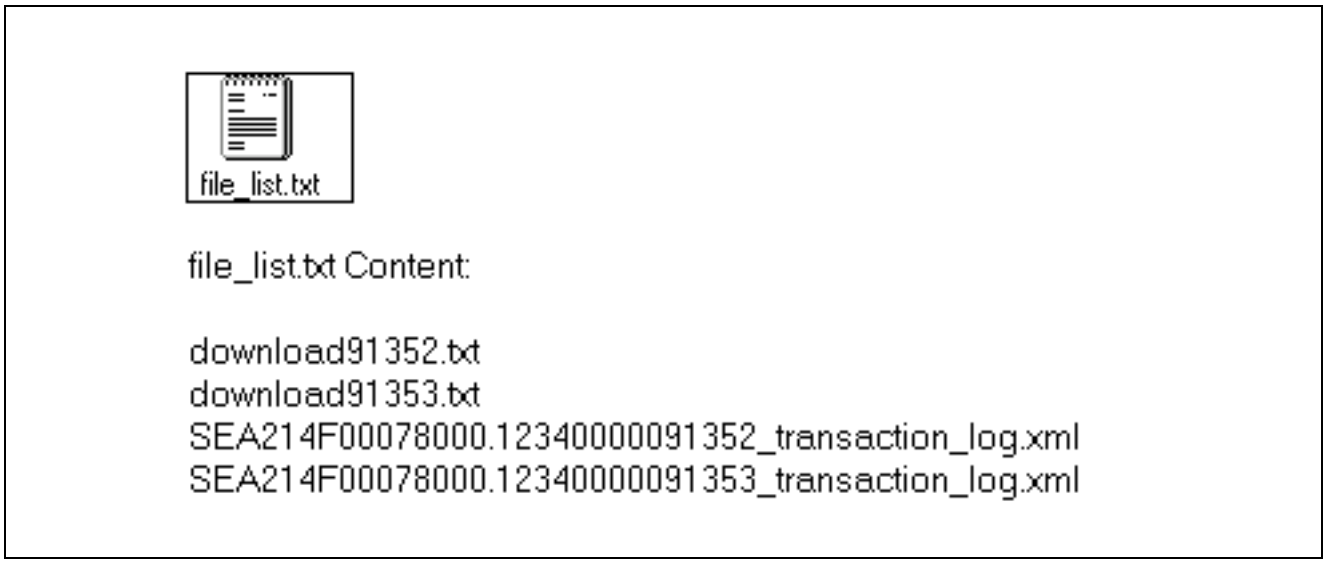
Import Process page

The SEVIS Download process loads file acknowledgement and transaction log results obtained from SEVIS into the PeopleSoft Enterprise Campus Solutions system.

Single File or **File List Driven**

Select *Single File* to load a single acknowledgement or transaction log file, or select *File List Driven* to load multiple files.

To load multiple files, you must create a document (for example, .txt) that lists all of the file acknowledgement and transaction log files that you want to load.



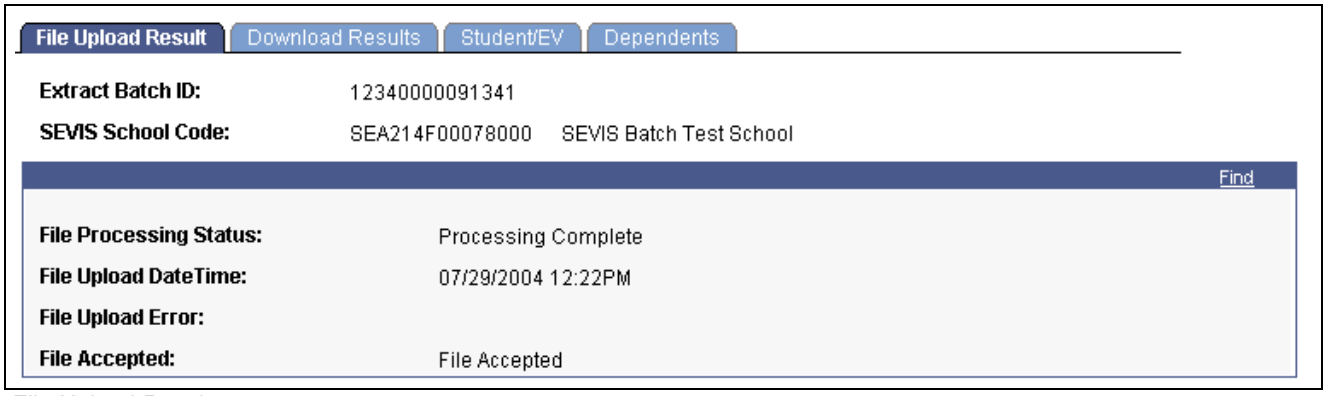
Example of a file list for the File List Driven option

File Name Enter the name of the file downloaded from SEVIS or the name of the file list if the File List Driven option is selected.

File Path Enter the path to the location of the SEVIS file to download.

Viewing Results of the XML Upload to SEVIS

Access the File Upload Result page.



File Upload Result page

This page reflects the SEVIS receipt status of the overall batch file from the XML document upload. The information is based on results provided in the file acknowledgement returned by SEVIS.

SEVIS School Code or **SEVIS Program Number** The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas, depending on the visa type for which the extract process was most recently run.

File Processing Status The system displays the status of the file from SEVIS. The possible status values are *Exported, Upload Acknowledged, Transaction Log Downloaded,* or *Processing Complete.*

Each time the SEVIS export process (Export SEVIS Events - F/M or Export SEVIS Events - J) runs, a new row with the extract batch ID and SEVIS

school code or SEVIS program number appears with the exported file processing status.

After you load the file acknowledgement log from SEVIS, the status changes to *Upload Acknowledged.*

After you load the transaction log from SEVIS, the status changes to *Processing Complete.*

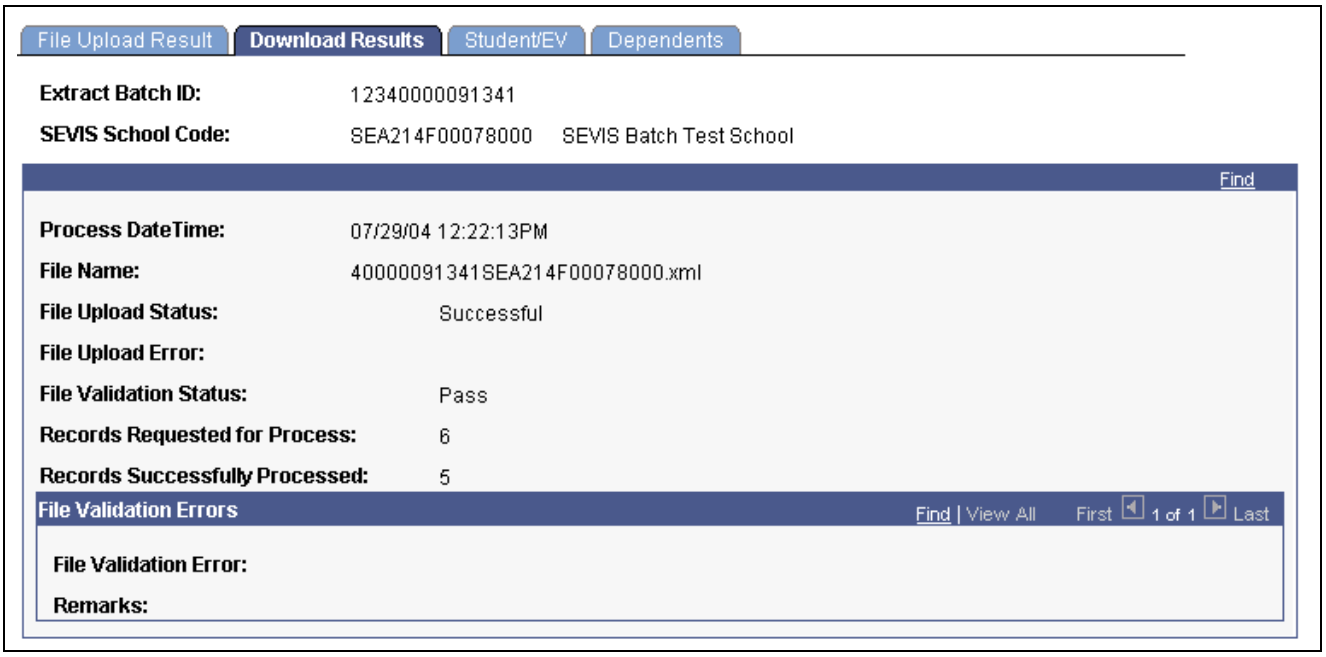
File Upload Error If the file processing is unsuccessful, the file upload error from SEVIS appears. This can be any number of explanations of the error from the File Errors Setup Table. One example is *File does not comply with SEVIS XML Schema.*

You should correct all errors before running the SEVIS Alerts process for that visa type again.

File Accepted Indicates whether or not SEVIS accepted the file for processing.

Viewing Results of the SEVIS Download

Access the Download Results page.



Download Results page

This page reflects the status of downloading the batch XML document into the SEVIS system. The information is based on results provided in the transaction log returned by SEVIS.

SEVIS School Code or **SEVIS Program Number** The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas, depending on the visa type for which the extract process was most recently run.

File Upload Status Displays the *Successful* or *Unsuccessful* file status returned from the SEVIS system.

File Upload Error If the file upload is unsuccessful, the file upload error from SEVIS appears here.

File Validation Status Displays the *Pass* or *No Pass* status of the file schema validation performed by the SEVIS system before transaction records are processed.

Records Requested for Process Displays the number of unique records included in the XML document to be processed.

Records Successfully Processed Displays the number of records successfully processed by the SEVIS system.

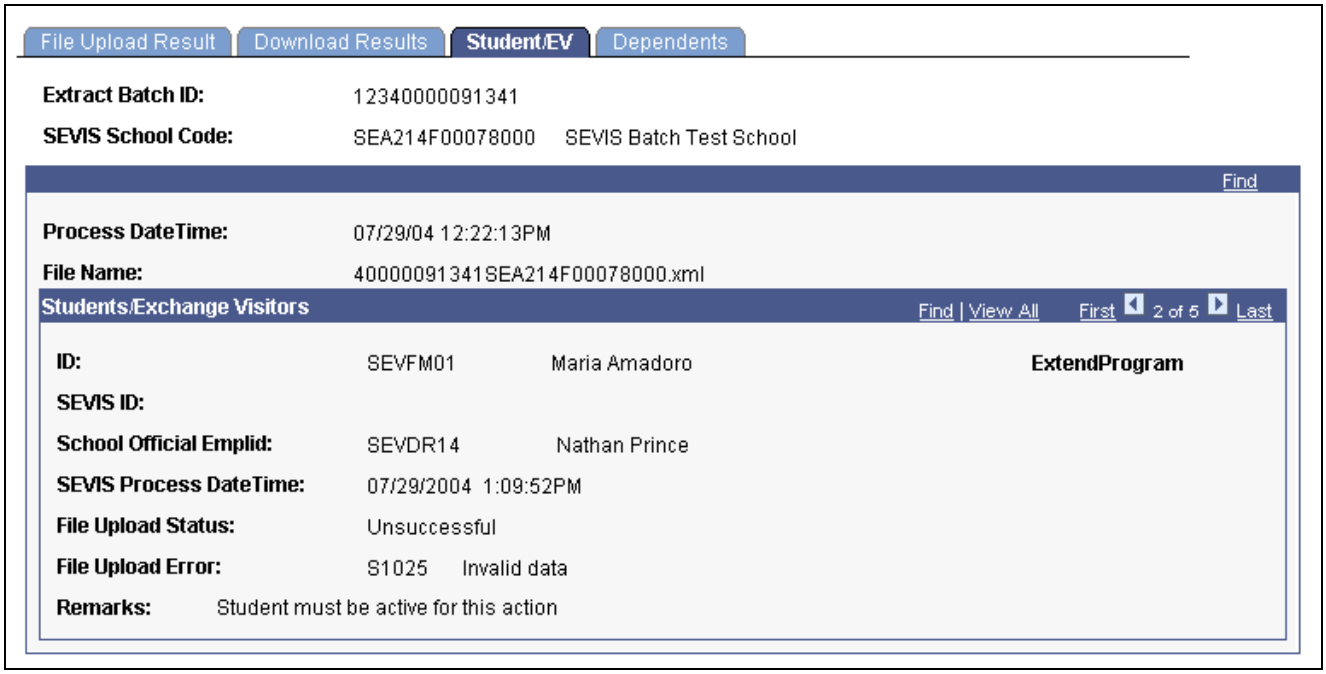
File Validation Error If the file validation fails, the file validation error code from SEVIS appears here.

You should correct all errors before running the SEVIS Alerts - F/M process again.

Remarks Displays the SEVIS file validation error description.

Viewing Individual Student or Exchange Visitor Record Results

Access the Student/EV page.



Student/EV (exchange visitor) page

This page reflects the results of an individual student or exchange visitor transaction record. The information is based on results provided in the transaction log returned by SEVIS. The text on the far right, ExtendProgram, indicates the event transmitted to SEVIS for the ID listed.

SEVIS School Code or **SEVIS Program Number** The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas, depending on the visa type for which the extract process was most recently run.

Students/Exchange Visitors

ID The system displays the PeopleSoft ID of the individual.

SEVIS ID The system displays the ID assigned to the individual by the SEVIS system.

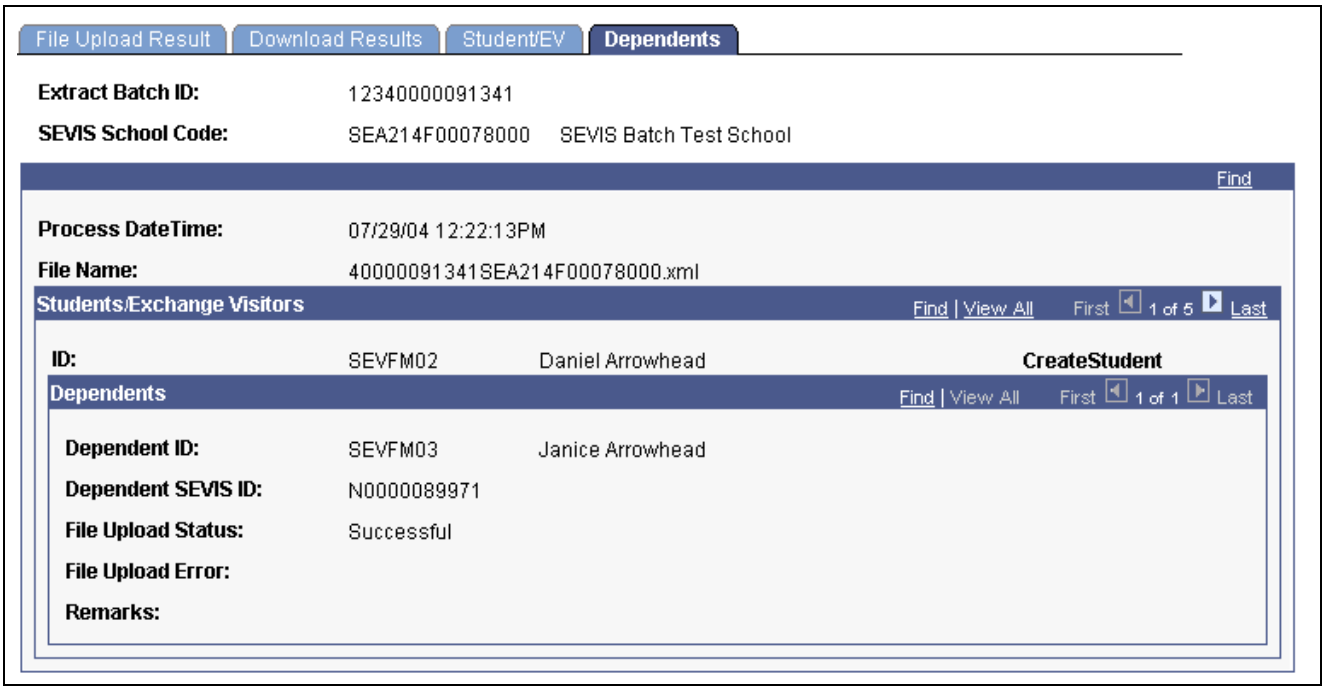
For new students or exchange visitors submitted to SEVIS using the Create Student or Create EV event, the SEVIS ID is returned only if the record is successfully processed by the SEVIS system.

File Upload Error If the file upload is unsuccessful, the file upload error from SEVIS appears here.

You should correct all errors before running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process for that visa type again.

Viewing Individual Dependent Record Results

Access the Dependents page.



Dependents page

This page reflects the results of an individual dependent transaction record. The information is based on results provided in the transaction log returned by SEVIS. The text on the far right, Create Student, indicates the event transmitted to SEVIS for the ID listed.

SEVIS School Code or **SEVIS Program Number** The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas, depending on the visa type for which the extract process was most recently run.

Students/Exchange Visitors

ID The system displays the PeopleSoft ID for the individual.

Dependents

Dependent SEVIS ID The system displays the ID assigned to the dependent by the SEVIS system.

For new dependents submitted to SEVIS using the Create Student event, Create EV event or Add Dependent event, the SEVIS ID is returned only if the record is successfully processed by the SEVIS system.

File Upload Error If the file upload is unsuccessful, the file upload error from SEVIS appears here.

You should correct all errors before running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process for that visa type again.

Updating the SEVIS Master Component

This sections discusses how to:

- Update the SEVIS Master component to match the DHS SEVIS Real Time Interface.
- Identify the record to include in the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process.
- Run the SEVIS alerts process.
- Reset check boxes for the update export.
- Run the export process.
- Set a record to active status.
- Enter the SEVIS ID.

Pages Used to Update the SEVIS Master Component

Page Name	Object Name	Navigation	Usage
(I-20 Form) Section 7–9	I20_Format	Campus Community, SEVIS, I-20 Forms, I-20 Form, Section 7-9	Select Funding Verified to identify the record to include in the SEVIS Alerts process for F and M visas.
(DS-2019 Form) Section 5	DS2019_FORM4	Campus Community, SEVIS, DS-2019 Forms, DS-2019 Form, Section 5	Select Funding Verified to identify the record to include in the SEVIS Alerts process for J visas.
Process SEVIS Alerts - F/M, , Process SEVIS Alerts - J	RUNCTL_CCSEVCMP	• Campus Community, SEVIS, F/M Alerts, Process SEVIS Alerts - F/M, SEVIS Alerts • Campus Community, SEVIS, J Alerts, Process SEVIS Alerts - J, SEVIS Alerts	Review data on the Alerts page and reset check boxes for the update export.

Page Name	Object Name	Navigation	Usage
Selection	SEV_REV_U_FILTER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Selection • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Selection	Select events to send to SEVIS, or to review prior to sending to SEVIS.
Alerts Header	SEV_ALERT_HEADER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Alerts Header • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Alerts Header	Review the events to send to the SEVIS Alerts table for F and M visas or for J visas.
Addl Data	SEV_REV_FMUPD	Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Addl Data	Review additional data required for a SEVIS event for F/M visas.
Addl Data	SEV_REV_EVUPD	Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Addl Data	Review additional data required for a SEVIS event for J visas.
Errors	SEV_REV_U_ERRORS	Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Errors or Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Errors	View event errors.
Export SEVIS Events - F/M	RUNCTL_SEV_EXTRACT	Campus Community, SEVIS, F/M Alerts, Export SEVIS Events - F/M	Populate the SEVIS Master records with F and M visas data.
Export SEVIS Events - J	RUNCTL_SEV_EXT_J	Campus Community, SEVIS, J Alerts, Export SEVIS Events - J	Populate the SEVIS Master records with J visas data.
Bio/Demo	SEV_MST_BIO_DEMO	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Bio/Demo	Review the biographical data sent to SEVIS. Update the status of the SEVIS Master component records to *Active.*
Addresses	SEV_MST_ADDR	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Addresses	Review the address data sent to *SEVIS.* Update the status of the SEVIS Master component records to Active.

Page Name	Object Name	Navigation	Usage
Program	SEV_MST_PGM	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Program	Review the program-related information sent to SEVIS. Update the status of the SEVIS Master component records to *Active.*
Registration	SEV_MST_REG	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Registration	Review the registration related data sent to SEVIS. Update the status of the SEVIS Master component records to *Active.*
Financial	SEV_MST_FIN	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Financial	Review the financial data sent to SEVIS. Update the status of the SEVIS Master component records to *Active.*
Dependents	SEV_MST_DEP	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Dependents	Review the dependent data sent to SEVIS. Update the status of the SEVIS Master component records to *Active.*
Employment/SOA	SEV_MST_EMP	Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master, Employment/SOA	Review the employment sent to SEVIS for F and M visa holders. Update the status of the SEVIS Master component records to *Active.*
SEVIS ID Maintenance	SEV_ID_MAINT	Campus Community, SEVIS, SEVIS Maintenance, SEVIS ID Maintenance	Enter or update SEVIS ID information for each student, exchange visitor, and dependent.

Updating the SEVIS Master Component to Match the SEVIS Real-Time Interface

This section provides an overview of the SEVIS Master component and discusses how to update it to match visas data in the SEVIS Real-Time Interface (RTI).

If you began using the SEVIS Real-Time Interface (RTI) to process students before using the PeopleSoft batch interface to SEVIS, you must add the same data on specific pages in the PeopleSoft system to continue sending updated data to SEVIS for the students and their dependents.

Most data already exists in the PeopleSoft Enterprise Campus Solutions system, such as biographical data and major information from the admissions application. However, you must confirm that this data appears there and manually enter all other data into the PeopleSoft system that exists in the RTI. For example, in the PeopleSoft Enterprise Campus Solutions system, for F and M visas you may need to complete the I-20 Form component, the Visa Permit Data page, and the Citizenship Data page data if you entered this information in the RTI. For J visas you may need to complete the DS-2019 Form component, the Visa Permit Data page, and the Citizenship Data page if you entered this information in the RTI.

When you have duplicated all of the data in the PeopleSoft system that exists in the RTI, be sure to select the Funding Verified check box on the PeopleSoft I-20 Form - Section 7-9 page for F and M visas or on the PeopleSoft DS-2019 Form - Section 5 page for J visas, just as you would to include any other record when you run the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process and generate the Create Student or Create Exchange Visitors events.

After running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process, clear all of the Send to SEVIS check boxes on the Alerts Headers page of the Select Alerts to Report - F/M or Select Alerts to Report - J to clear the Send to SEVIS check boxes for all events. Then select the check boxes again for only the new students or new exchange visitors whose records you created on RTI.

When you run the SEVIS F/M export process (Export SEVIS Events - F/M), the system creates master records for those students. When you run the SEVIS J export process (Export SEVIS Events - J), the system creates master records for those exchange visitors. The master records are used in the PeopleSoft SEVIS system and reflect data already entered on the RTI.

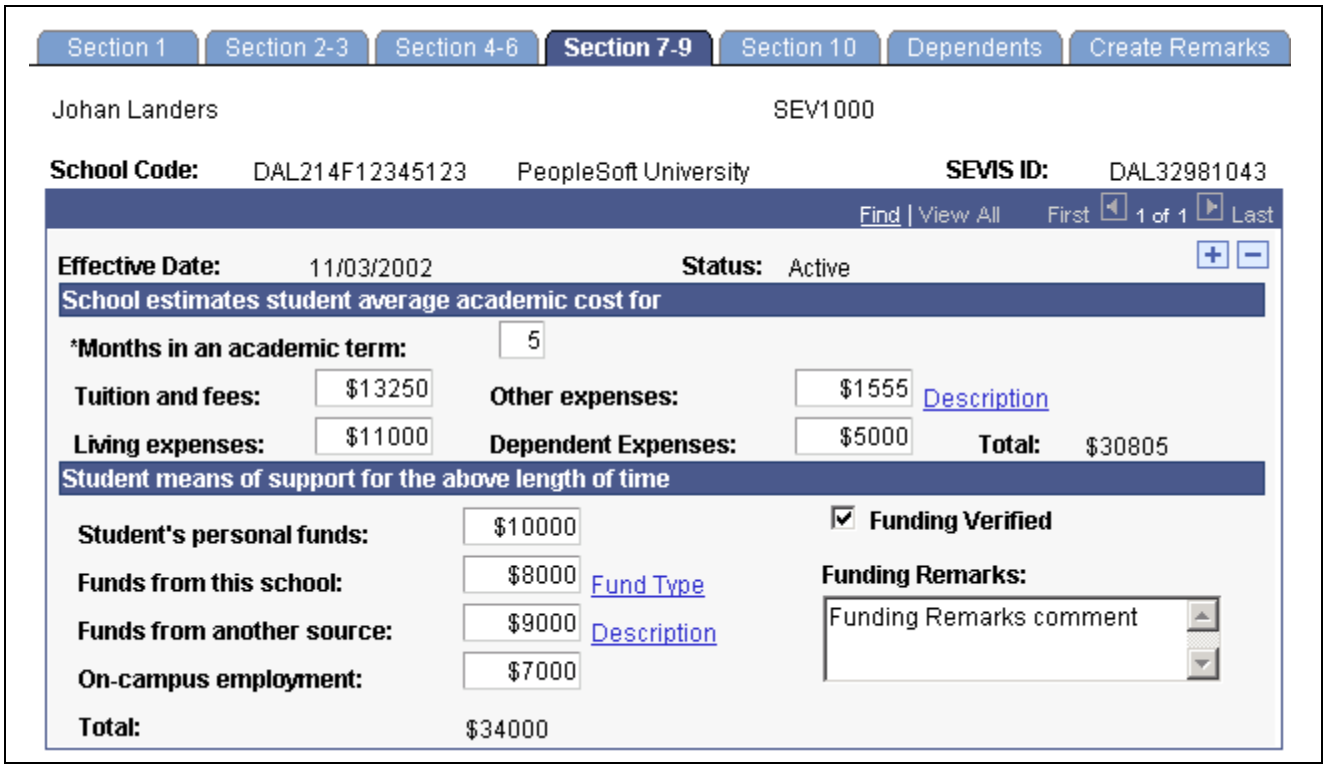
Warning! Run the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process and select Send to SEVIS *only* for the students or exchange visitors that you created in the RTI. Then run Export SEVIS Events - F/M or Export SEVIS Events - J to update the PeopleSoft SEVIS Master component. The export creates the XML file that you would normally upload to SEVIS. However, do *not* send this XML file to SEVIS. The purpose of the export is to update the SEVIS Master component to reflect data that already exists in the SEVIS RTI.

After you export the data to update the SEVIS Master component, you must set the status for each record to *Active.* If you do not do this, future events for the students or exchange visitors will not be triggered.

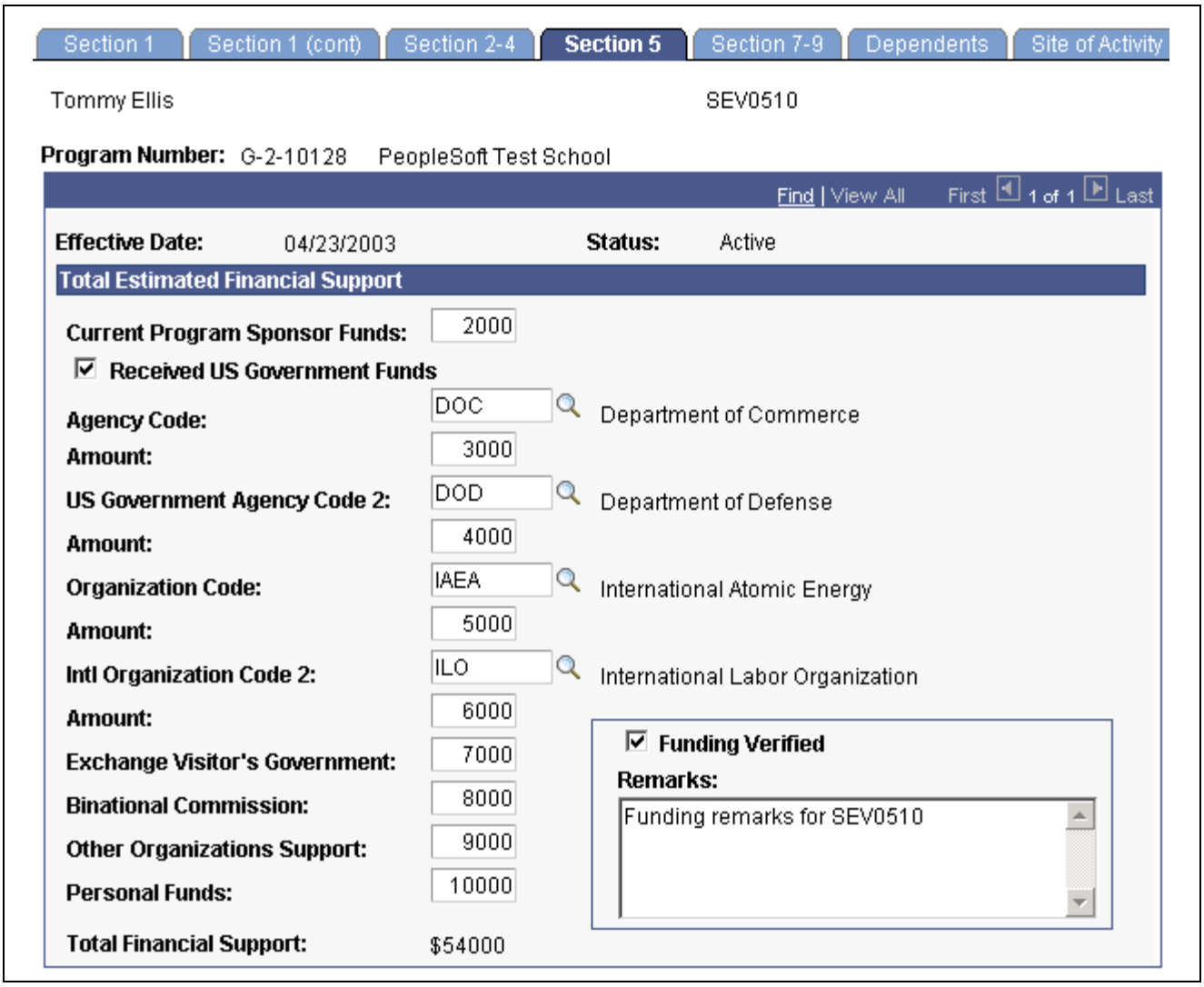
On the SEVIS ID Maintenance page, you must manually enter the SEVIS ID assigned to the student, exchange visitor and dependents in the RTI.

Identifying the Record to Include in the SEVIS Alerts Process

For F and M visas, access the (I-20 Form) Section 7-9 page. For J visas, access the (DS-2019 Form) Section 5 page.



(I-20 Form) Section 7-9 page



(DS-2019 Form) Section 5 page

Funding Verified After you enter all form data from the SEVIS RTI into the PeopleSoft system, select the Funding Verified check box to include that individual in the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process. (After you enter all I-20 data for a student, select the check box on the (I-20 Form) Section 7-9 page. After you enter all DS-2019 data for an exchange visitor, select the check box on the (DS-2019 Form) Section 5 page.)

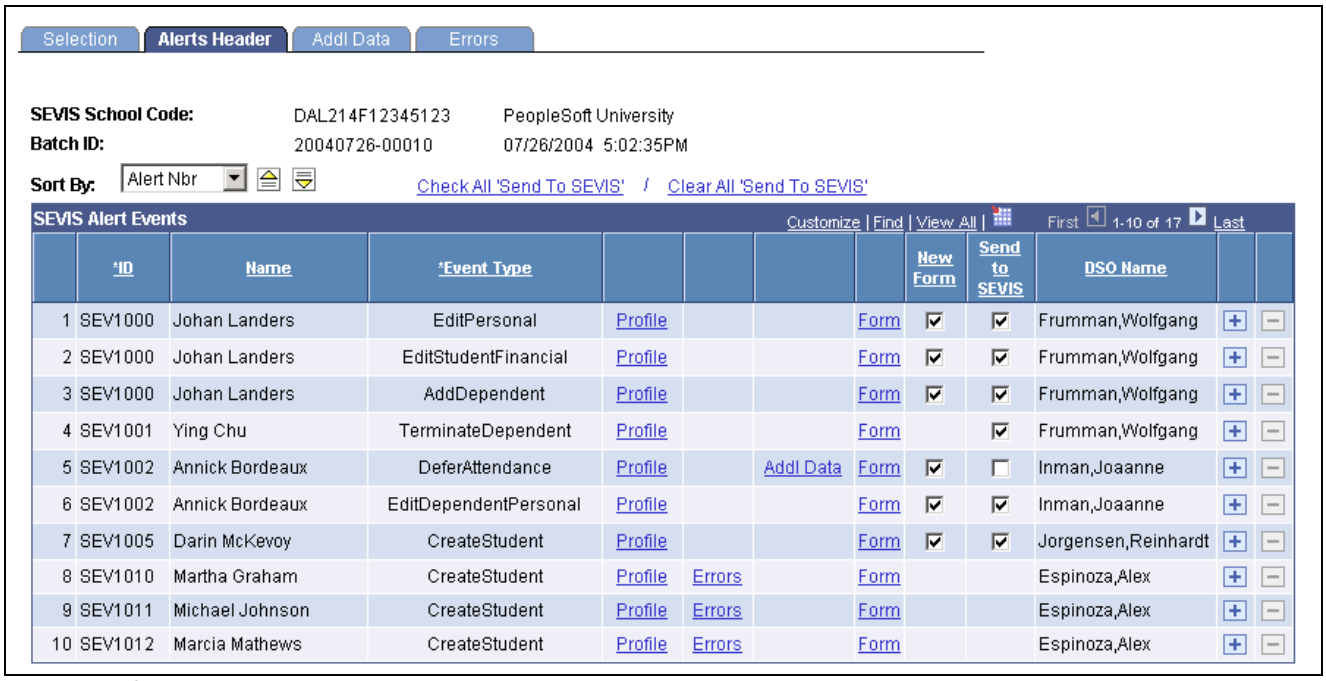
Running the SEVIS Alerts Process

You must run the SEVIS Alerts - F/M process the records selected on the (I-20 Form) Section 7-9 page, or run the SEVIS Alerts - J process to process the records selected on the (DS-2019 Form) Section 5 page.

See Chapter 28, "Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing," Running the SEVIS Alerts Process, page 354.

Resetting Check Boxes for the Update Export

Access the Alerts Header page.



Alerts Header page

Select theClear All 'Send To SEVIS'link to clear all Send to SEVIS check boxes for all events. Then select the Send to SEVIS check box for each new student or exchange visitor whose record you created or updated from RTI data.

SEVIS School Code or **SEVIS Program Number** — The system displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas depending on the menu navigation that you selected.

Send to SEVIS — Select this check box to include the record in the next run of the Export SEVIS Events - F/M or Export SEVIS Events - J process for that visa type.

Clear All Send to SEVIS — Click this link to clear all of the Send to SEVIS check boxes on the page.

Running the Export Process to Update SEVIS Master

For F and M visas, access the Export SEVIS Events - F/M page, and for J visas, access the Export SEVIS Events - J page.

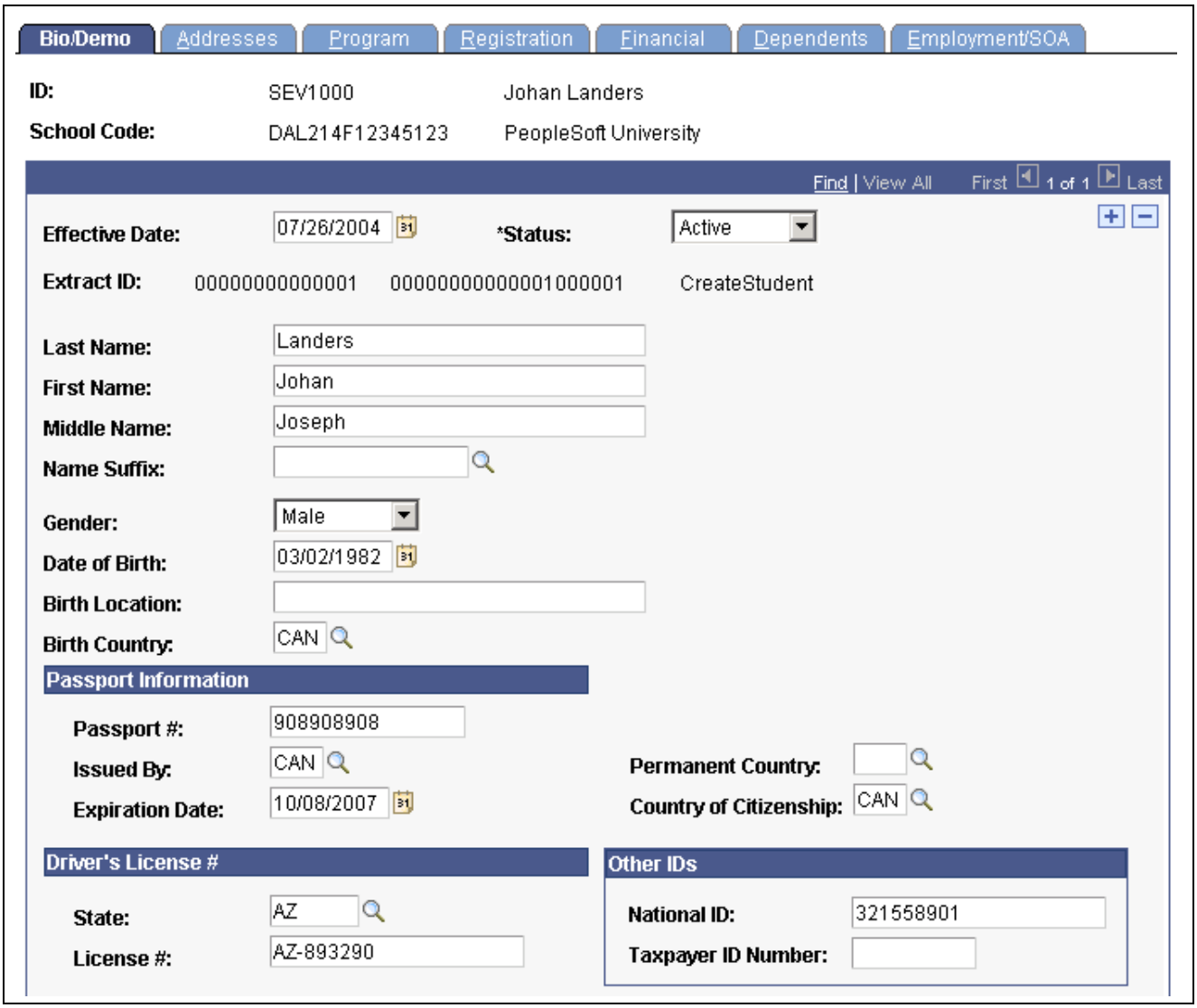
See Chapter 28, "Managing PeopleSoft Patriot Act SEVIS Solution Visa Processing," Generating an XML File to Send to SEVIS, page 382.

After you select the Send to SEVIS check box on the Alerts Header page for each student or exchange student for whom you need to create SEVIS Master component records, run the export process for the appropriate visa type (Export SEVIS Events - F/M or Export SEVIS Events - J) to populate the SEVIS Master records.

Note. Do *not* send this XML file to SEVIS. The purpose of the export is to update the SEVIS Master component to reflect data that already exists in the SEVIS RTI.

Setting a Record to Active Status

Access each SEVIS Master Component page.



SEVIS Master Component page

Navigate to the SEVIS Master component for each ID that you manually entered in the SEVIS RTI. The PeopleSoft SEVIS Master component should always be a mirror image of the information in the SEVIS RTI.

When you first access the component, the status on each page is *Inactive.* Change the status to *Active.* Repeat this for each of the appropriate pages.

Note. Normally, you would not manually update the status or any other field in the SEVIS Master component. The Import process updates the master records based on the transaction results received from SEVIS. The only time that you update information in the SEVIS Master component is when you have used the SEVIS RTI to enter or change data for a student or exchange visitor and you need to update the same information in the SEVIS Master component to reflect the changes.

You can also do this using Structured Query Language (SQL) by generating a list of all affected emplIDs You must set the Status field for all master records (PS_SEV_MST_xxx) to *Active.* If you do not do this, future events for these students or exchange visitors will not trigger.

Note. If you enter more than one dependent for the student or exchange visitor, the Dependent page will have multiple rows.

Updating Events Entered Directly in RTI

Events can be entered directly in RTI, either manually or by a third-party vendor. When this is the case, you must enter the data in PeopleSoft SEVIS Master to reflect the current RTI.

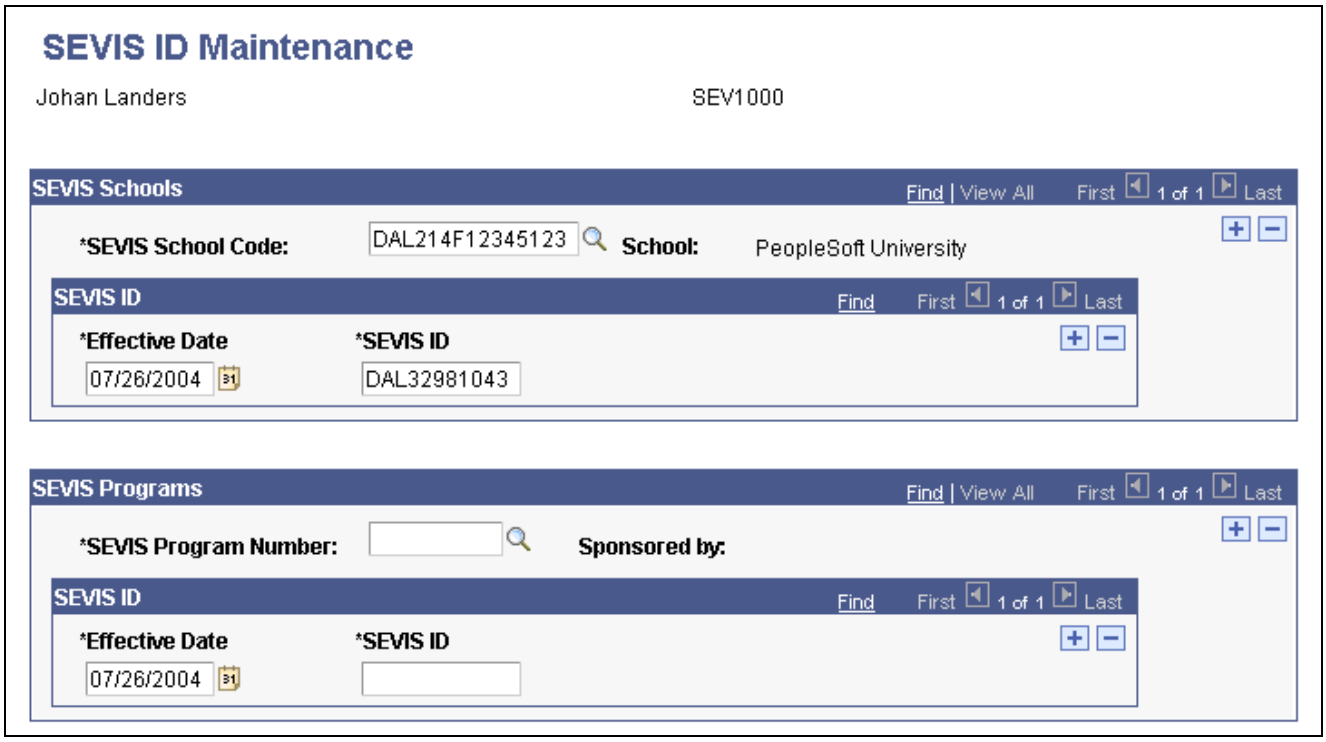
Also, for some events, you must enter additional data into SEVIS Master that was not entered in RTI. This table lists these events and the additional information that you must add:

Event	Additional Information for SEVIS Master
Registration (F/M Visas)	On the Registration page: • Term = The last term for which the student was registered • Full Course = *Y* • Enter the Current Session End Date and Next Session Start Date values.
Auth Drop Below Full Course (F/M Visas)	On the Registration page: • Term = Same term as from Registration event • Populate Full Course = *N* • Enter the Auth Reason, Start Date, and End Date values.
Resume Full Course (F/M Visas)	On the Registration page: • Term = Same term as from Registration event • Populate Full Course = *Y* • Delete anyAuth Reason, Start Date, and End Date values (leave blank).
CPT, OPT or Off Campus Employment (F/M Visas)	On the Employment Authorizations page and the Employment/SOA page. • Enter data from RTI. • Enter the effective date with Status = *Active*
Terminate Dependent (F/M or J Visas)	On the Dependents page of the I-20 and SEVIS Master: • Enter the Termination Reason value. • Relationship Status = *Inactive* • For J Visa dependents, enter the Termination Effective date.
Dependent End Status (J Visas)	On the Dependents page of the DS-2019 and SEVIS Master: • Enter the End Status Reason value. • Relationship Status = *Inactive*
Reactivate Dependent (F/M Visas)	On the Dependents page of the I-20 and SEVIS Master: • Delete the Termination Reason value. • Relationship Status = *Inactive*

Event	Additional Information for SEVIS Master
Complete Program (F/M Visas)	On the Program page, Completed = *Y*
Terminate Student (F/M Visas)	On the Bio/Demo page, enter theTermination Reason and Termination Date values.
Disciplinary Action (F/M Visas)	On the Bio/Demo page, SEVIS Criminal Conviction = *Y.*
Validate EV (J Visas)	On the Bio/Demo page, Validated Participant = *Y.*
Correct Infraction (J Visas)	On the Bio/Demo page, enter the Infraction Type value.
Delete Site of Activity (J Visas)	On the DS-2019 and SEVIS Master, add a row to enter the Site of Activity Code with status = *Inactive.* On SEVIS Master, enter an effective date with status = *Active.*
Add Site of Activity (J Visas)	On the DS-2019 and SEVIS Master, add a row to enter the Site of Activity Code with status = *Active.* On SEVIS Master, enter an effective date with status = *Active.*
Terminate EV (J Visas)	On Bio/Demo page, enter the EV Termination Reason value.
End Program (J Visas)	On the Program page, enter the End Program Reason value and effective date.
EV Matriculation (J Visa)	On the Program page, enter the Matriculation Type value.

Entering the SEVIS ID

Access the SEVIS ID Maintenance page.



SEVIS ID Maintenance page

SEVIS Schools

SEVIS School Code For F and M visas, enter the SEVIS school code for the school that the student is attending.

Effective Date and **SEVIS ID** Obtain the SEVIS ID and effective date for the student and dependents from the RTI, and enter them here.

SEVIS Programs

SEVIS Program Number For J visas, enter the SEVIS program number for the institution sponsoring the exchange visitor.

Effective Date and **SEVIS ID** Obtain the SEVIS ID and effective date for the exchange visitor and dependents from the RTI, and enter them here.

Extracting External Vendor Data

This section provides an overview of external vendor system integration and discusses how to extract external vendor data.

Page Used to Extract External Vendor Data

Page Name	Object Name	Navigation	Usage
External Extract	RUNCTL_CCSEVINT	Campus Community, SEVIS, SEVIS External System Export, External Extract	Select data parameters for integration with an external vendor.

Understanding the Integration to External Vendor Systems

For institutions that use a system other than PeopleSoft Enterprise Campus Solutions for batch interface transmissions to SEVIS, PeopleSoft provides a process to extract selected international student biographical, admissions, and records data for loading into a third-party vendor software program. The data is extracted based on the parameters that you enter on the External Extract page. The third-party software uses this data for SEVIS processing.

The External System Export process creates an XML document in a schema defined by PeopleSoft. This XML schema is defined to include fields maintained in the PeopleSoft system that are reportable to SEVIS, as well as additional data fields used by programs (external to Campus Solutions) that provide batch interface functionality to the SEVIS system.

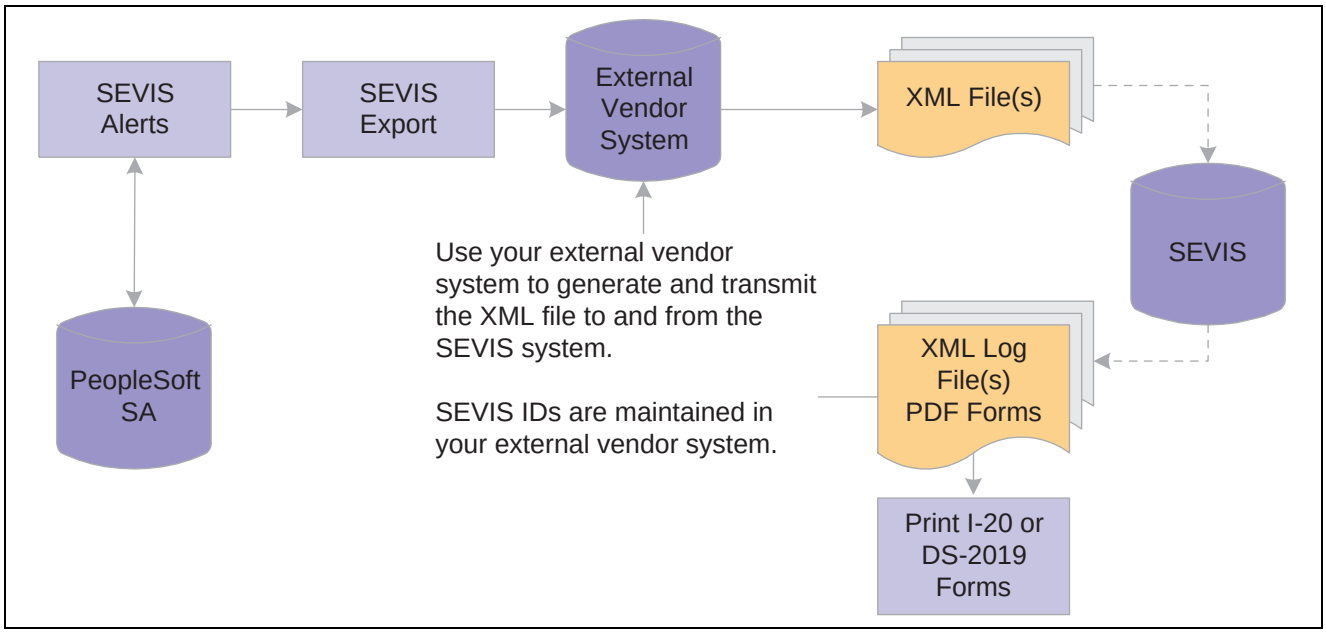
Refer to the PeopleSoft_SEVIS_ExternalSystemExtract.xsd and to the PeopleSoft_SEVIS_ ExternalSystemExtract_Definition.xls for specific schema definition and for a list of fields that are included in the XML document that is created by the process.

PeopleSoft Enterprise Campus Solutions to External Vendor System

The External System Export process exports all current data (for fields defined by the schema) for all students who meet the visa type selection criteria that you specify. The External System Export process creates an XML document that includes all current, relevant data for the population of students that you define.

In this business process flow, it is assumed that you have completed the SEVIS setup for your Campus Solutions system and that you use an external vendor system for identifying and submitting data to submit to the SEVIS system.

This flowchart illustrates the external vendor system export processing business process:



External Vendor System Export process business flow

You must enter data on the SEVIS Setup page, the SEVIS School Code Table page, the SEVIS Program Sponsor Table, the DoS Post Code Table page, the Port of Entry Table page, the Country Mapping page, the Visa Mapping page, and the Suffix Mapping page to make use of the External System Export process. The mappings defined on these pages are important for identifying correct data that are included in the resulting XML document.

You must maintain current visa type information (using country equal to *USA*) in Campus Solutions for the population of individuals that you want to include in an external system extract.

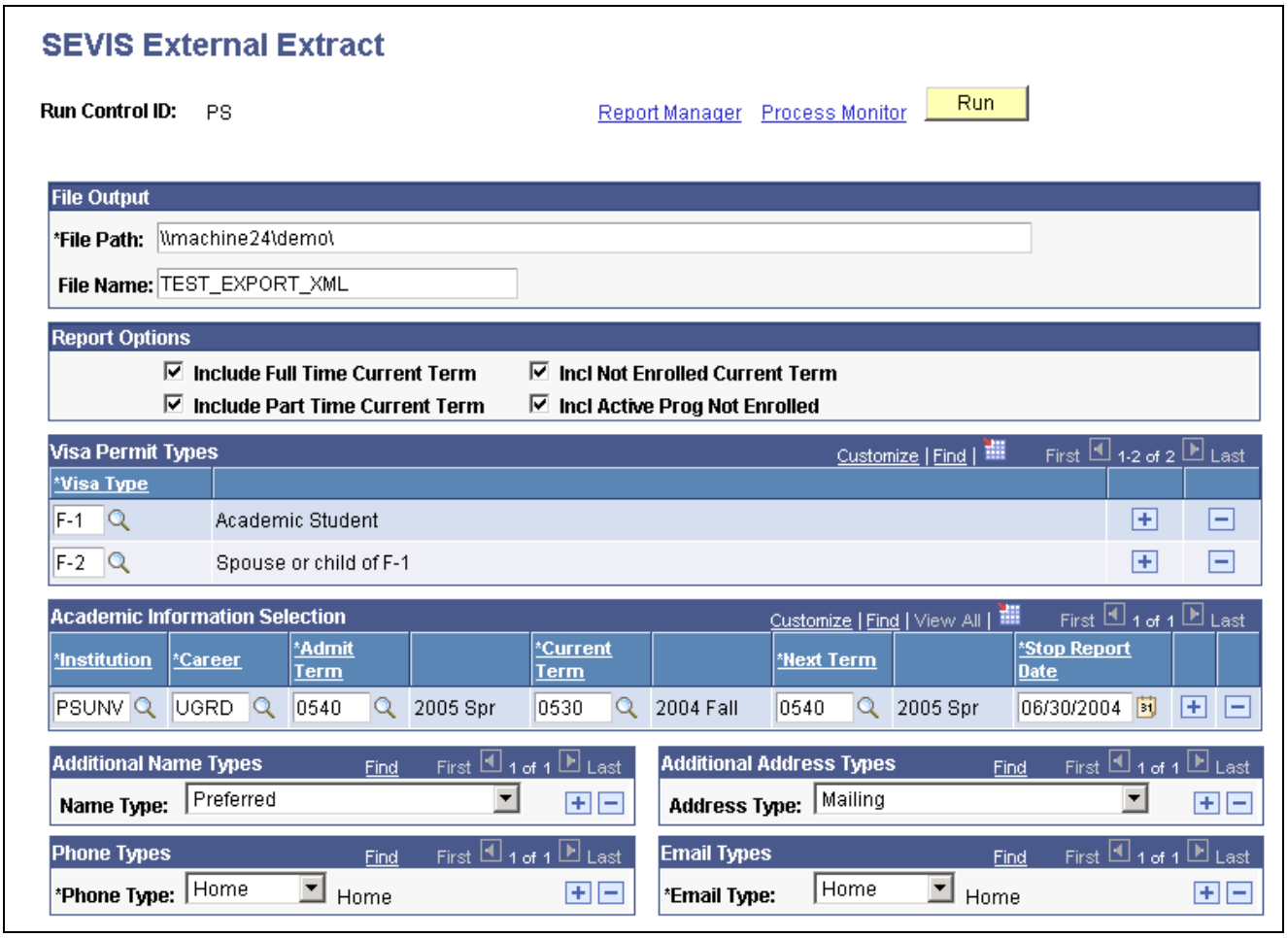
See Also

Chapter 24, “Managing Identification Data,” Entering Visa and Permit Data, page 276

Chapter 6, “Setting Up Patriot Act SEVIS Solution Visa Processing,” page 59

Extracting Data for External Vendor Systems

Access the SEVIS External Extract page.



SEVIS External Extract page

You can extract F/M visas data or J visas data for external vendor systems. The sample page shows F/M visas.

File Output

File Path Enter the path to where you want to place the output file.

File Name Enter a name for the output file. If you do not specify a file name, the system generates the extracted XML document uses the following naming convention: [ProgramName][RunControlID][ProcessInstance]. For example, CCSEVINT_ExternalSysExport_126.xml.

Report Options

Select each of the reports that you want to include. The options are:

- *Include Full Time Current Term*
- *Include Part Time Current Term*
- *Include Not Enrolled Current Term*
- *Include Active Program Not Enrolled*

Visa Permit Types

Visa Type Enter each visa type to use as selection criteria for the program.

The External System Export process selects students who have the specified visa types defined on the Visa/Permit Data page.

Academic Information Selection

Institution Select the institution to use for the extract.

Career Select the career to use for the extract

Admit Term Select the admit term to use for the extract.

The program uses this value to determine which admission data rows are included in the output.

Current Term Select the current term.

The program uses the current term that you specify to identify the current term end date from the term calendar. The current term end date is a field that is reportable to SEVIS.

Next Term Select the next academic term following the current.

The program uses the next term you specify to identify the next session start date from the term calendar. The next session start date is a field that is reportable to SEVIS.

Stop Report Date Enter the date (usually an historical date) to indicate when an individual is no longer included in the active population.

The program uses the stop report date to limit the individuals included in the active population. The program evaluates the stop report date you specify and compare against the student's most recent enrollment activity for that Institution and Career. If the student was last enrolled for a term that ended before the stop report date you specify, that student is not included in the extract.

For example, many F-1 students maintain an institution affiliation after graduating by pursuing Optional Practical Training. Consider these students when determining a stop report date.

Additional Name Types

Name Type Select each additional name type to extract for all individuals included in the extract process.

The program exports all current name data for the types you specify that are recorded for the individual.

The name data required for SEVIS is included in a separate structure in the XML document created by the process. You can select additional names if your external system can make use of them.

Additional Address Types

Address Type Select each additional address type to extract for all individuals included in the extract process.

The program exports all current address data for the types you specify that are recorded for the individual.

The address data required for SEVIS is included in a separate structure in the XML document created by the process. You can select additional addresses if the external system can use them.

Phone Types

Phone Type Select each phone type to extract for all individuals included in the extract process.

The program exports all current phone data for the types you specify that are recorded for the individual.

Email Types

Email Type Select each email type to extract for all individuals included in the extract process.

The program exports all current email data for the types you specify that are recorded for the individual.

CHAPTER 29

Understanding the 3Cs—Communications, Checklists, and Comments

This chapter provides an overview of the 3Cs—communications, checklists, and comments and lists common elements.

The 3Cs—communications, checklists, and comments—are a flexible way to track and analyze correspondence, lists of requirements, and notes about the students, staff, constituents, and organizations in your database.

Communication management enables you to fully manage all types of contacts inside and outside your institution. Checklist management enables you to create lists of requirements and monitor their status. Comments creation enables you to attach notable remarks about individuals and organizations.

You can enter communications, checklists, and comments manually throughout your system, or, using the 3C engine, you can define events and triggers to have the system add communications, add comments, and add or update checklists for individuals or organizations automatically from within your business processes.

Each of the 3Cs requires an administrative function and a 3C update/inquiry group.

The administrative function identifies the variable data associated with the specific category of communication, checklist, or comment. For example, the administrative function of ADMA, for Admissions [Application Level] identifies the Academic Career, Student Career Number, Application Number, and Application Program Number.

The 3C update/inquiry group provides user-level security access to categories of communications, checklists, and comments, while providing or restricting the user's ability to edit the data. For example, a security administrator might give a specific user 3C update/inquiry group security access to items in the Notice of Dismissal communication category, with an update only status so that he or she can view the data but cannot modify it.

Buttons appear on many pages in the system to enable you to transfer directly from that page to another page within the same administrative function, to generate or review a communication, checklist, or comment for the individual or organization whose information you are currently viewing.

Common Elements Used in The 3Cs Chapters

(communications)

Transfers you to the appropriate Communications Management page, where you can review or create communications for the individual or organization. Communications include letters, phone calls, meetings, emails, and faxes.

(checklists)

Transfers you to the appropriate Checklists Management page, where you can review or create checklists for the individual or organization. Checklists may be lists of steps that must be performed, or documents that must be provided, or communications that are planned to occur, and so on.

(comments)	Transfers you to the appropriate Comments page, where you can review or enter comments about the individual or organization.

See Also

Chapter 31, “Managing Communications,” page 433

Chapter 32, “Managing Comments,” page 467

Chapter 33, “Managing Checklists,” page 477

Chapter 13, “Setting Up Administrative Functions,” page 123

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Securing Campus Community,” Setting Up 3C Group Security

Chapter 30, “Using the 3C Engine,” page 409

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Using Mass Change”

CHAPTER 30

Using the 3C Engine

This chapter provides an overview of the 3C engine and discusses how to:

- Define 3C engine events.
- Define 3C engine triggers.
- Set 3C engine security.
- View 3C triggers results.
- Specify mass change parameters.

Understanding the 3C Engine

The 3C engine is a rules-based PeopleSoft application engine that you can integrate with functional transactions to automatically insert or update communications, comments, and checklists records as you interact with students, suppliers, and employees. For example, you can eliminate steps required to manually enter 3C information by setting the 3C engine to automatically insert defined checklists, communications, and comments for prospects as you enter new admissions prospects to the system. You can use online business transactions to invoke 3C engine processing or you can use background integration with certain delivered programs.

Note. The PeopleSoft system delivers two background programs predefined and integrated with the 3C engine. PeopleSoft Enterprise Contributor Relations Gift Acknowledgement process invokes the 3C engine to record results in the 3C engine trigger results table for background processing, and PeopleSoft user profiles management process invokes the 3C engine to record the real-time system communication inserts.

To use the 3C engine, you use administrative functions and detail data to define the rules (called engine events) to identify the sets of communication, checklists, and comments records that you want the engine to enter or update for you. Then, you can either set your own conditions (called triggers) to invoke the action of entering or updating the 3C records or you can use the predefined triggers delivered with your system.

If your institution licenses and uses PeopleSoft Enterprise Campus Self Service, you can configure your system to record in real time, the checklists that you want self-service users to be able to view in the To Do's list self-service transaction. For example, when a prospective student logs onto your self-service site to request application information about your school, after saving the request, the system can record the checklist information that you specify in the engine event definition. When the prospective student logs in the next time, he or she can see the specific tasks that they must accomplish to complete your school's application process.

See Also

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Self-Service Campus Personal Information," Using Self-Service Checklists Data

Defining 3C Engine Events

This section discusses how to define 3C engine events and discusses how to:

- Define 3C engine events.
- Select joint rules compare fields.
- View communication keys.

Understanding 3C Engine Events

Define 3C engine events to set rules by which the system identifies the sets of communications, checklists, and comments records for the 3C engine to enter or update.

Prerequisites

Before using the 3C engine, you must set up communications, checklists, and comments. If you are going to use communication speed keys (Comm Keys), set those up first, too.

See Also

Chapter 14, “Setting Up Communications,” page 129

Chapter 16, “Setting Up Checklists,” page 149

Chapter 15, “Setting Up Comments,” page 143

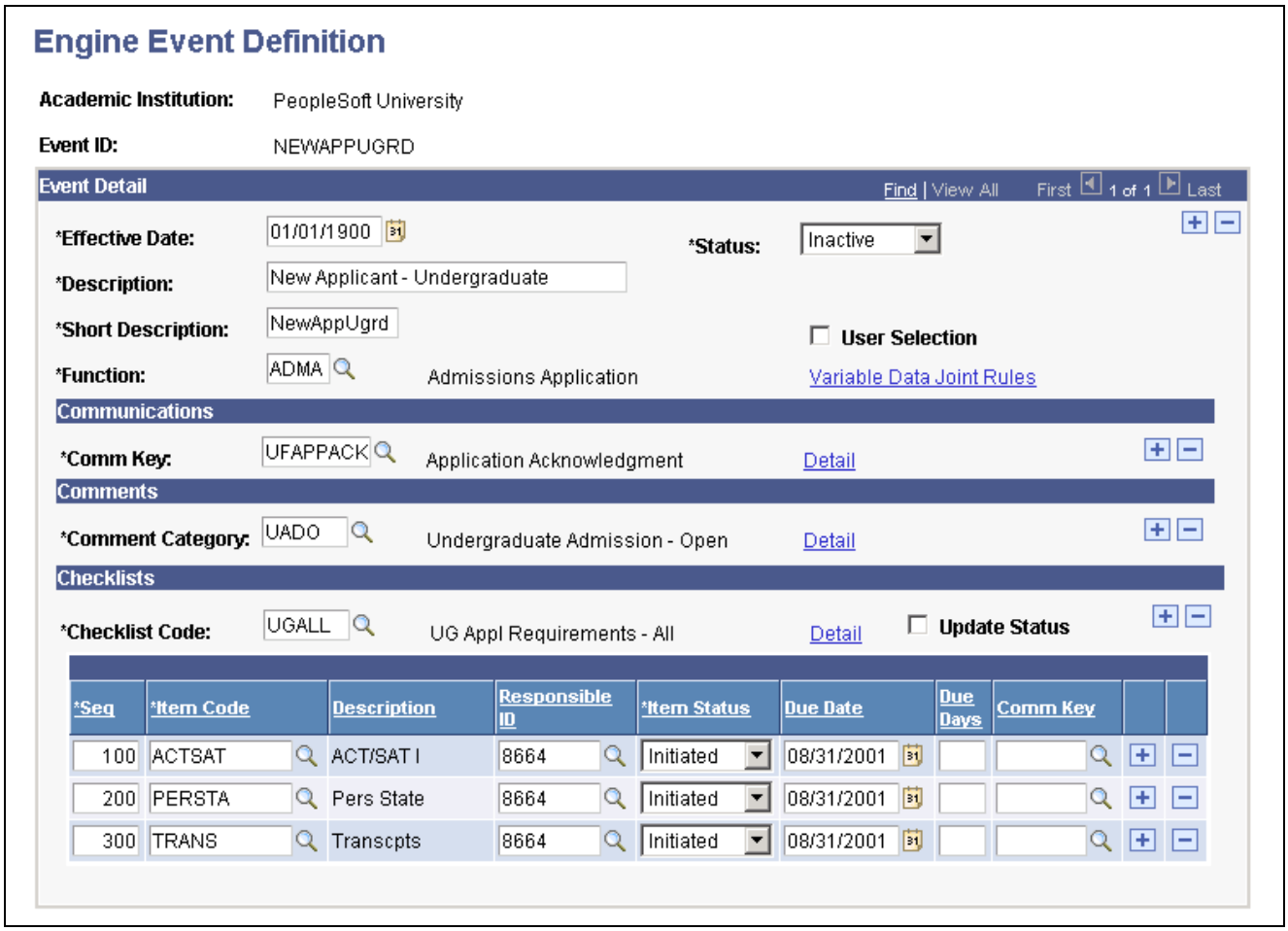
Chapter 14, “Setting Up Communications,” Defining Communication Speed Keys, page 139

Pages Used to Define 3C Engine Events

Page Name	Object Name	Navigation	Usage
Engine Event Definition	EVNT_3CS_SETUP	Campus Community, 3C Engine, Set Up 3C Engine, Event Definition	Define 3C engine events to identify or review the communications, comments, or checklists for the 3C engine to assign or update.
Joint Rules Compare Fields	EVNT_JRULES_AF	Click the Variable Data Joint Rules link on the Engine Event Definition page.	Select joint rules compare fields to identify variable data for the 3C engine to compare in determining and assigning joint communications.
Comm Key Detail (communication key detail)	EVNT_3CS_COMM_SEC	Click the Details link in the Communications area of the Engine Event Definition page.	View Communication Keys to determine or modify data for the communication to assign.
Comments Detail	EVNT_3CS_CMNT_SEC	Click the Details link in the Comments area of the Engine Event Definition page.	View or modify the text of the comment to assign.
Checklist Detail	EVNT_3CS_CHK_SEC	Click the Details link in the Checklists area of the Engine Event Definition page.	View or modify the parameters of the checklist to assign.

Defining the 3C Engine Events

Access the Engine Event Definition page.



Engine Event Definition page

Event Detail

Function Enter the functional area for this 3C engine event.

User Selection Select this check box to enable users to select the communication, comment, and checklist to assign to transactions for this 3C engine event definition. When selected, the engine assigns only the communication, comment, and checklist specified by the user.

For example, if you license and use the Request Information self-service transaction in PeopleSoft Enterprise Campus Self Service, you would select the User Selection option when defining a 3C engine event for the web prospects. That way, the prospects can select the communications that they want to receive.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, “Setting Up Recruiting and Admissions Self Service”.

When not selected, the engine assigns all communications, checklists, and comments identified in this 3C engine event.

Variable Data Joint Rules Click this link to access the Joint Rules Compare Fields page, where you can select the variable data fields that you want the system to compare to determine and assign joint communications.

Communications

Comm Key Enter the Comm Key to specify the communication to assign as part of this 3C engine event.

Detail Click this link to access the Event Communication Detail page, where you can view or edit the details of the specified Comm Key.

Comments

Comment Category Enter the comment category for the comment to assign as part of this 3C engine event.

Detail Click this link to access the Event Comment Detail page, where you can view or edit the details of the specific comment category.

Checklists

Checklist Code Enter the checklist code for the checklist to assign as part of this 3C engine event.

Update Status Select this check box for the 3C engine to update each checklist item to the specified status.

For example, you might include an item on the prospects checklist to require the assignment of a recruiter to each new prospect. You can create a 3C engine event definition to have the system automatically update that checklist item when you enter the new prospect into the database and assign the recruiter.

Sequence The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of checklist items to be assigned as part of this 3C engine event.

Item Code Enter the checklist item code for the checklist item to assign as part of this 3C engine event.

Available item codes are from the Checklist Item Functions page.

Responsible ID Enter the ID of the individual at your institution who is responsible for this checklist item.

Item Status Select the status of the checklist items to assign as part of this 3C engine event.

Due Days Enter the number of due days associated with the checklist items to assign as part of this 3C engine event.

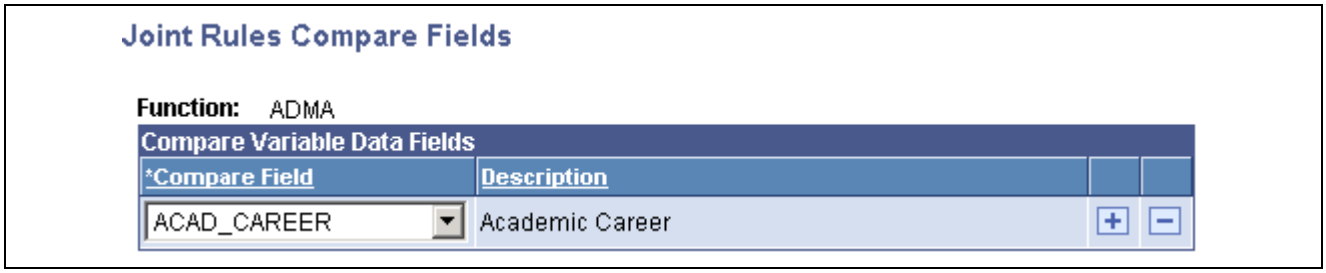
Due Date Enter the due date associated with the checklist item to assign as part of this 3C engine event.

Comm Key The Comm Key of the checklist to be assigned as part of this 3C engine event.

If the checklist to assign is of the default type that is set on the Installation Table - SA Options page (*Communications List* is the delivered default value), the system displays the Comm Key field. You can override this to select a different Comm Key.

Selecting Joint Rules Compare Fields

Access the Joint Rules Compare Fields page.



Joint Rules Compare Fields page

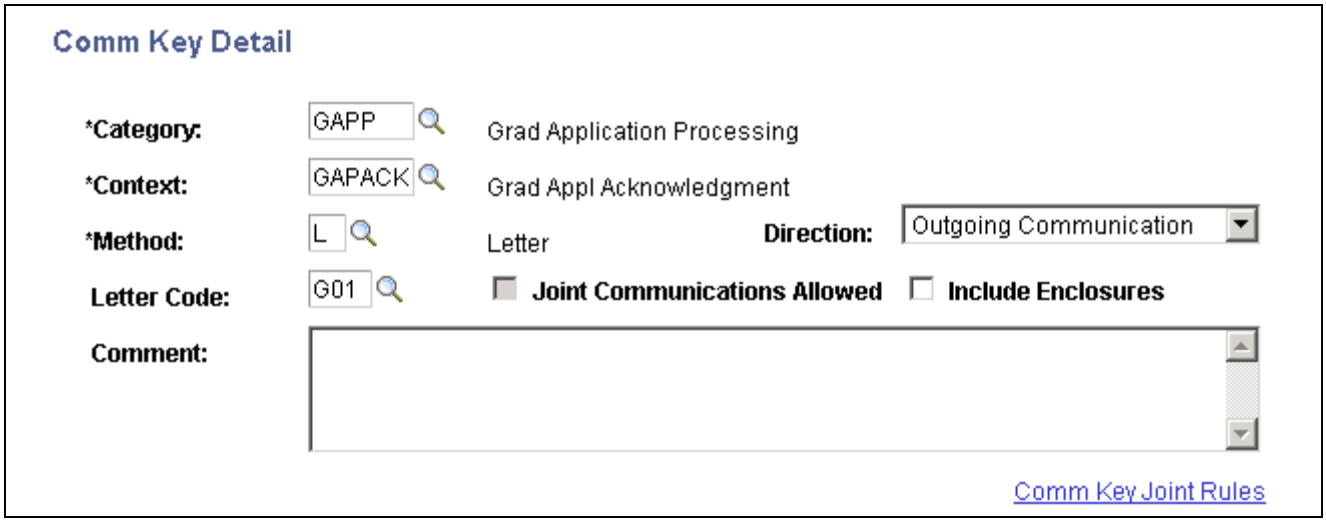
Compare Field If you use joint communications, select the data fields to compare for any two related IDs that are set on the Relationships page to enable joint communications. When the compare finds the same variable data in these fields for both IDs, the condition triggers the assignment of a joint communication for the primary ID.

See Also

Chapter 31, "Managing Communications," Understanding Joint Communications, page 435

Viewing Communication Keys

Access the Comm Key Detail page.



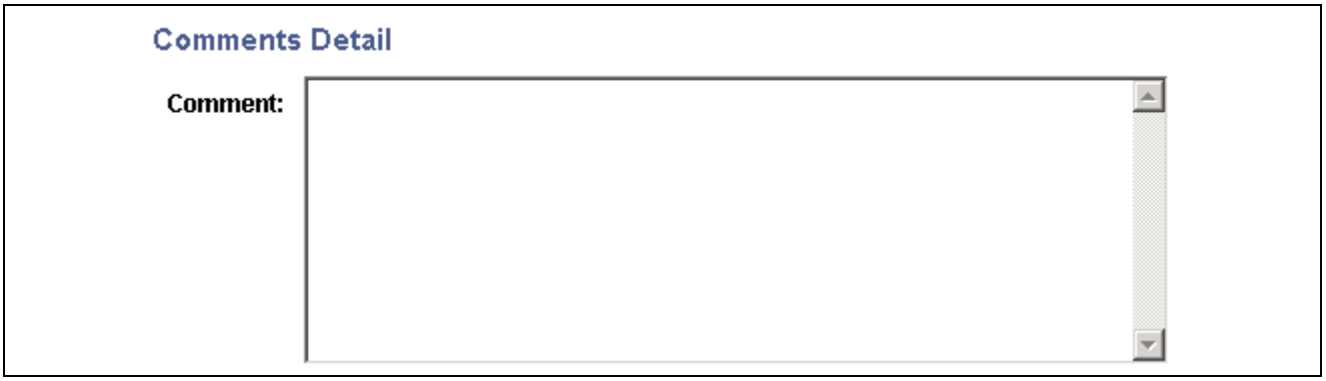
Comm Key Detail page

Data on this page comes from the Communication Speed Key page. You can accept the default data or you can change it. Changing the data here modifies what the 3C engine assigns to individuals or organizations for the Comm Key that you specify. It does not change the data on the Communication Speed Key page.

For example, you might use a particular Comm Key to manually assign communications. You can also use that Comm Key on the 3C event definition, and if you want to make changes that affect only the individuals or organizations to whom the 3C engine assigns communications, you can. Perhaps you have a special condition that occurs and you want to include a special comment on the communication record for those recipients. When you add that comment here, only the communications assigned by this event definition will have that comment. The original Comm Key data remains unchanged.

Viewing Comments

Access the Comments Detail page.

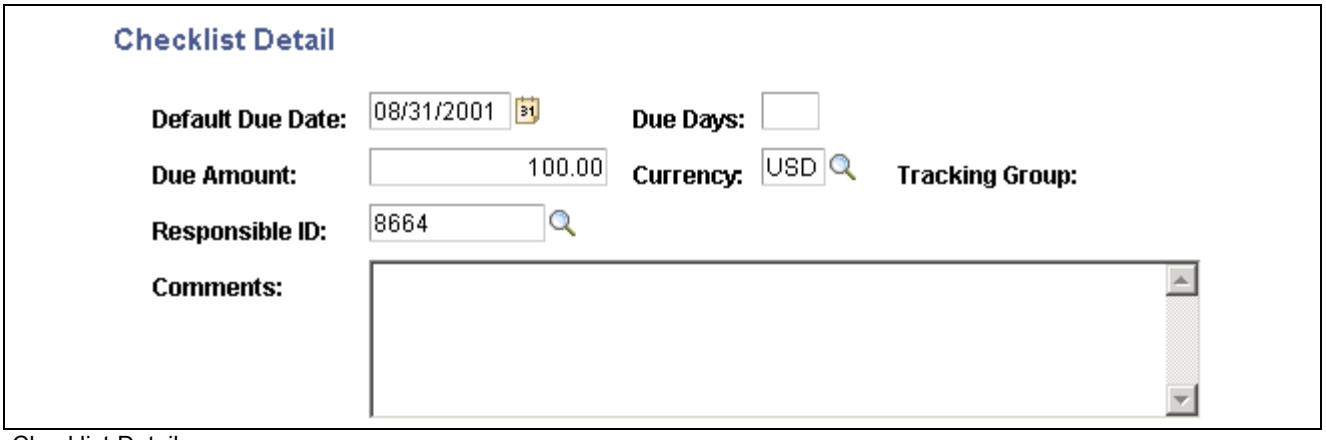


Comments Detail page

You can enter a comment for the 3C engine to assign to all of the IDs processed by the engine event. Entering a comment here does not change any comments entered on the Comment Entry page for those IDs.

Viewing Checklists

Access the Checklist Detail page.



Checklist Detail page

You can use the default data or modify it. You can enter a comment for the 3C engine to assign to all of the IDs that will be assigned to this checklist by the engine event. Changing data and entering a comment here does not change data or any comments entered on the Checklist Management page for those IDs.

Defining 3C Engine Triggers

This section provides an overview of 3C engine triggers and discusses how to:

- Map trigger prompts.
- Identify trigger conditions.

Understanding 3C Engine Triggers

Online triggers are conditions that you define to indicate when to invoke 3C engine processing. You can define triggers to occur in real time or to store in a trigger table for background processing later. Triggers are table specific. They identify record or field level conditions and associate the 3C engine event definition to use when the trigger conditions are met by creating, changing, or deleting data in the system.

The 3C engine online triggers are integrated with the system by using a PeopleCode function. The function evaluates certain key variable information provided in the PeopleCode placed in the transactional locations. You must define certain variable assignment values when you place this PeopleCode in other records or components. The following PeopleCode example identifies and describes these variables.

For example, the Trigger3CEngine function call placed on the ADM_APPL_DATA record in your system has these variable assignments.

```
Declare Function Trigger3CEngine PeopleCode FUNCLIB_CS.EVENT_3CS_ID FieldFormula;

PanelGroup string &ID, &RECNAME, &ACTION, &OVERRIDE, &VAR_DATA, &INSTITUTION;

&ID = "EMPLID";
&RECNAME = "ADM_APPL_DATA";
&ACTION = "N";
&OVERRIDE = "N";
&VAR_DATA = ?Y?;
&INSTITUTION = ADM_APPL_DATA.INSTITUTION;
Trigger3CEngine();
```

The PeopleSoft system delivers some predefined 3C engine PeopleCode function calls. You can use the EmplID (SavePostChange) field on these records:

- ADM_APPL_DATA
- ADM_APPL_PROG
- ADM_PRSPCT_CAR
- ADM_PRSPCT_PROG
- ADM_WEB_PRS_CAR

You can configure your system to provide 3C engine integration in other areas by placing the PeopleCode function call in the appropriate records or components in these ways:

- Place the Trigger3CEngine function call in any record or component-record location.
- Place the Trigger3CEngine function call only in the SavePostChange PeopleCode event.
- Place the Trigger3CEngine function call only in locations where a person ID (EMPLID or similar field) or organization ID (EXT_ORG_ID or similar field) is included in the component.

After you identify and place the appropriate Trigger3CEngine function, you must define the online triggers.

You can view 3C engine triggers in the Trigger Result table before running the 3C engine trigger background process. You can also add individuals or organizations to the trigger table before initiating the background assignments.

Trigger definitions set to process assignments in background add rows to the Trigger Result page as users perform the business transactions that meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to *batch* for the trigger, each time a new applicant is added to the database, the 3C engine inserts a row on the Trigger Result page for the new applicant.

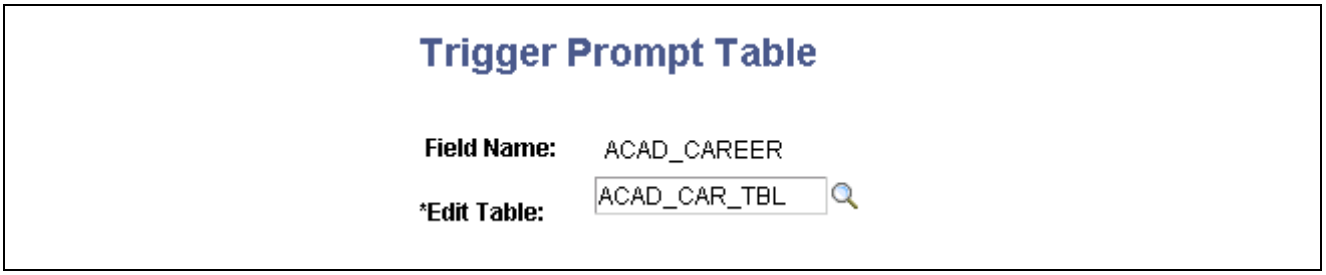
Note. Trigger definitions set to *system* mode do not add rows to the Trigger Result table as business transactions are performed.

Pages Used to Define 3C Engine Triggers

Page Name	Object Name	Navigation	Usage
Trigger Prompt Mapping	TRGR_PROMPT_TBL	Campus Community, 3C Engine, Set Up 3C Engine, Trigger Prompt Table	Map trigger prompts identifying the edit table to use with the trigger fields.
Engine Trigger Definition	TRGR_3CS_ON_SETUP	Campus Community, 3C Engine, Set Up 3C Engine, Trigger Definition	Identify trigger conditions to invoke the 3C Engine.

Mapping Trigger Prompts

Access the Trigger Prompt Table page.



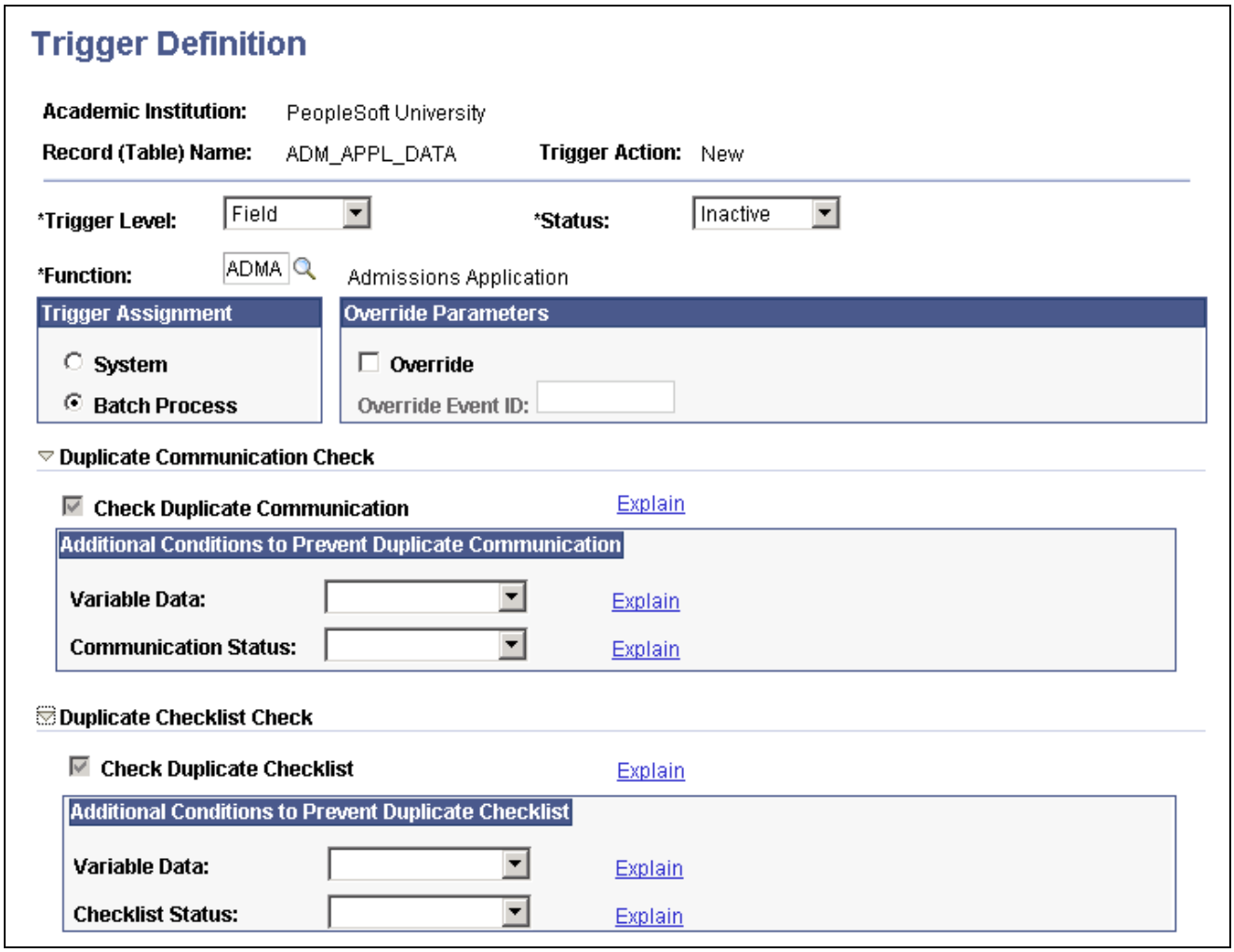
Trigger Prompt Table page

Edit Table Enter the source record that contains the field conditions to use on the Engine Trigger Definition page. Mapping to an edit table is optional.

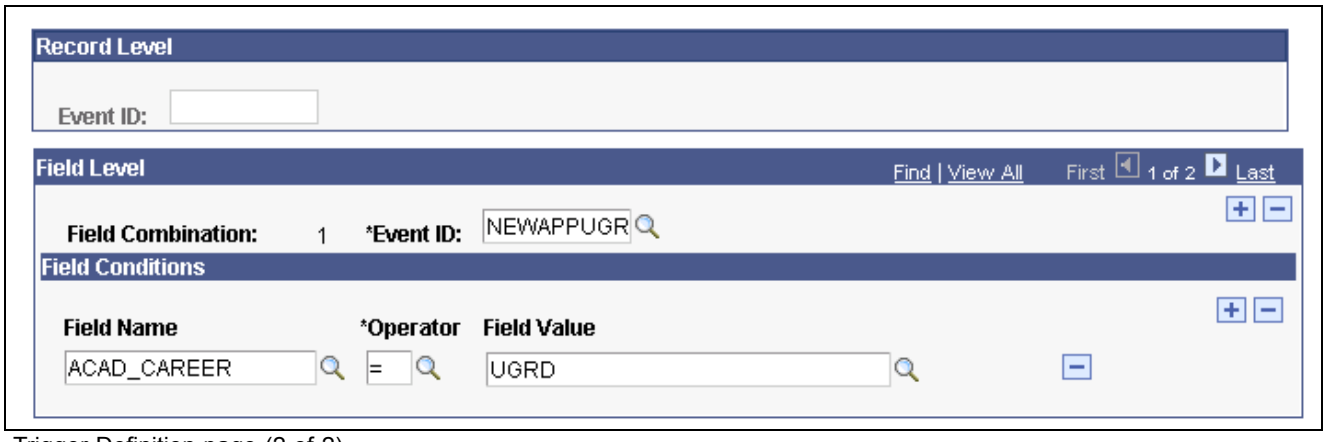
For example, to make academic career (ACAD_CAREER) values available from the Engine Trigger Definition page, map to the Academic Career Table (ACAD_CAR_TBL).

Identifying Trigger Conditions

Access the Trigger Definition page.



Trigger Definition page (1 of 2)



Trigger Definition page (2 of 2)

Trigger Action The system displays the action *(New (add), Change,* or *Delete)* that you selected. The action must occur as described on this page to invoke the 3C engine.

Note. The SavePostChange PeopleCode must use the same add, change, or delete action that you define here.

Trigger Level Select the level at which this action must occur to invoke the 3C engine.

Record: The specified trigger action on the row invokes the 3C engine process, regardless of field. You must specify the 3C engine Event ID to process for a record level trigger.

Field: The specified trigger action on the field invokes the 3C engine process. You must specify the Event ID to process and the fields on which the specified action occurs, to invoke the 3C engine.

Function Enter the functional area (administrative function) for this event trigger.

Trigger Assignment

System Select this check box to insert or update in real time, the communications, comments, and checklists specified in the 3C engine event ID.

Batch Process Select this check box to indicate that when the specified action occurs to the record or field, the system should insert a row on the Engine Trigger Results page for use by 3C engine background processing later.

Override Parameters

Override Select this check box to prevent the 3C engine from using the field or record conditions identified on this page, and, instead, use the logic configured around the Function Trigger3CEngine PeopleCode on the record or component location.

If you select the Override option, you must specify the overriding 3C engine event ID to use.

Override Event ID Enter the 3C engine event to process when the Override option is selected.

Duplication Communication Check

Check Duplicate Communication Enter the 3C engine event to use to determine if a communication is a duplicate and to assign or prevent assignment according to the defined conditions.

See Chapter 30, "Using the 3C Engine," Managing Duplicate Communication Assignments, page 428.

Duplicate Checklist Check

Check Duplicate Checklist The 3C engine event that determines if a checklist is a duplicate and assigns or prevents assignment according to defined conditions.

See Chapter 30, "Using the 3C Engine," Managing Duplicate Communication Assignments, page 428.

Record Level

Event ID Enter the 3C engine event to process when the trigger level is *Record.*

Field Level

Field Combination The system displays the next sequential field combination for each field level event ID that you add.

Event ID Enter the 3C engine event to process when the trigger level is *Field* and the specified field conditions are met.

Field Conditions

You can define multiple field combination conditions. When the specified trigger action meets any of the conditions, the 3C engine processes the specified field level 3C engine event.

Field Name Enter the name of the field on the specified record that, when this trigger action is performed, must meet the specified condition to invoke the 3C engine.

Operator Enter the conditional operator for this field condition and the value that it modifies—for example, the admission term field *(ADMIT_TERM)* must be greater than or equal to 0390 (March 1990).

Values for this field are delivered with the system as translate values. You can modify these translate values:

< Less than.

<= Less than or equal to.

<> Not equal.

= Equal to.

> Greater than.

>= Greater than or equal to.

IN: In.

Setting 3C Engine Security

This section provides an overview of 3C engine security and discusses how to assign engine event 3C groups.

Understanding 3C Engine Security

You use 3C groups to set security for 3C engine events just as you do to set security for communications, checklists, and comments outside of the scope of the 3C engine. A user can then trigger only the events within the 3C group to which he or she is assigned. When the trigger is invoked online, the PeopleCode function assigns only those engine events for which that user has inquiry or update access. If the user does not have security access for the engine event, the system ignores the assignment. 3C group security applies to online event assignment only.

See Also

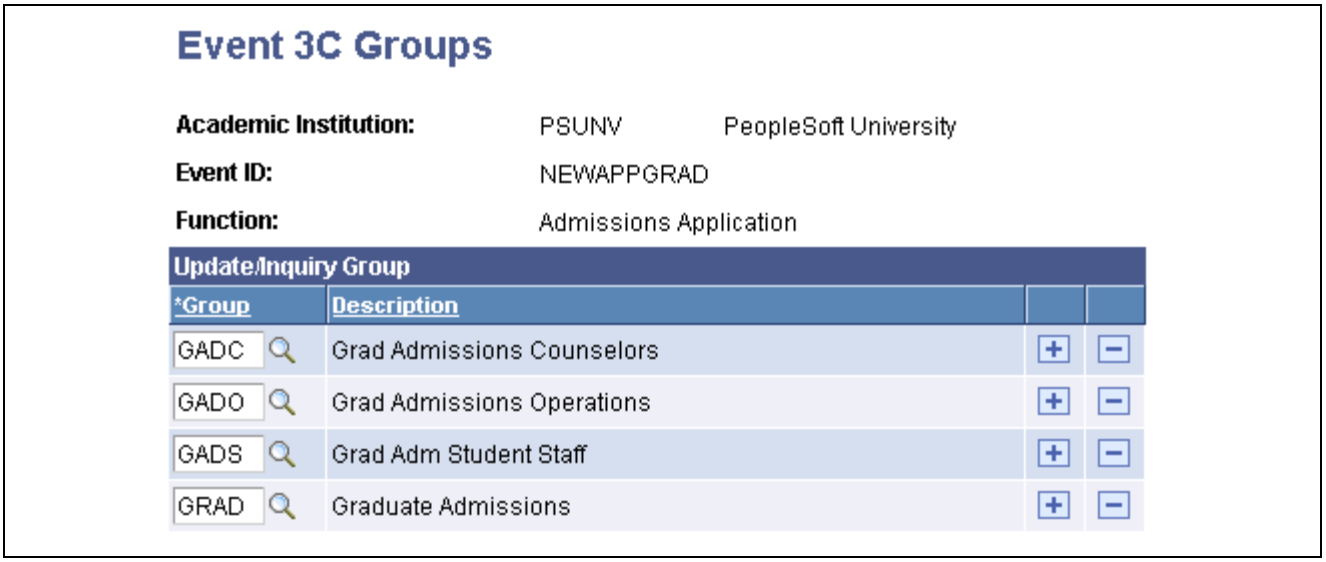
PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Securing Campus Community,” Setting Up 3C Group Security

Page Used to Set 3C Engine Security

Page Name	Object Name	Navigation	Usage
Engine Event 3C Groups	EVNT_GRP_3C_TABLE	Campus Community, 3C Engine, Set Up 3C Engine, Event 3C Groups	Assign engine event 3C groups to assign security to 3C engine event definitions.

Assigning Engine Event 3C Groups

Access the Event 3C Groups page.



Event 3C Groups page

Add the groups that should have security access to this event ID.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Securing Campus Community," Setting Up 3C Group Security.

Viewing 3C Engine Trigger Results

This section provides an overview of trigger results and discusses how to view 3C engine trigger results.

Understanding Trigger Results

You can review the 3C engine triggers on the 3C Engine Trigger Results page before running the 3C engine trigger background process to assign the communications, checklists, and comments in batch. You can also add individuals or organizations to the trigger table before initiating the batch assignments.

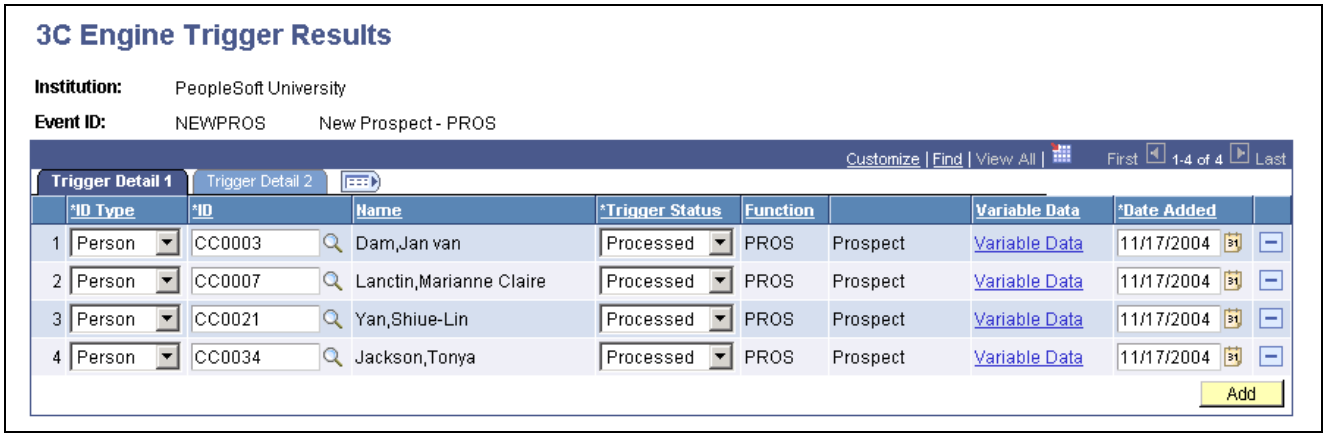
Trigger definitions that are set to process assignments in batch add rows to the 3C Engine Trigger Results page as users perform the business transactions that meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to batch for this trigger, each time a new applicant is added to the database, the 3C engine inserts a row for the applicant on the Trigger Result page.

Pages Used to View 3C Engine Trigger Results

Page Name	Object Name	Navigation	Usage
3C Engine Trigger Results	TRGR_3CS_TABLE	• Campus Community, Checklists, 3C Engine Trigger Results • Campus Community, Communications, 3C Engine Trigger Results • Campus Community, Comments, 3C Engine Trigger Results • Campus Community, 3C Engine, 3C Engine Trigger Results	View trigger results to determine the individuals or organizations to which the 3C engine background process assigns the communications, comments, or checklists.
Variable Data	TRGR_PROS_SEC	Click the Variable Data link on the Trigger Result page, Trigger Detail 1 tab.	View or change the variable data for the targeted individual or organization.

Viewing Trigger Results

Access the 3C Engine Trigger Results page.



3C Engine Trigger Results page - Trigger Detail 1 tab

Trigger Detail 1 tab

ID Type Specify the type of ID, either *Person* or *Organization.*

ID The system displays the ID of the person or organization for the 3C engine to process.

Trigger Status Select the status of the trigger process to use for the specified individual or organization.

By default, when the 3C engine adds a row in the trigger table, it sets the trigger status to *Processed.* You can override this value.

Rows set with this status of *Processed*are the only rows processed by the 3C engine. To temporarily disable a row from being processed, perhaps to do some investigation, you must set the trigger status to something other than

Processed. The other values are: *Cancelled, Error, In Process, Suspense,* or *Unprocessed.* These values are delivered with the system as translate values. You should not modify the delivered values, but you can add others.

You can reset the trigger status to *Processed* to include it in the next run of the process. When you run the 3C engine process, the rows set to *Processed* are deleted, leaving only the rows manually set to a different trigger status.

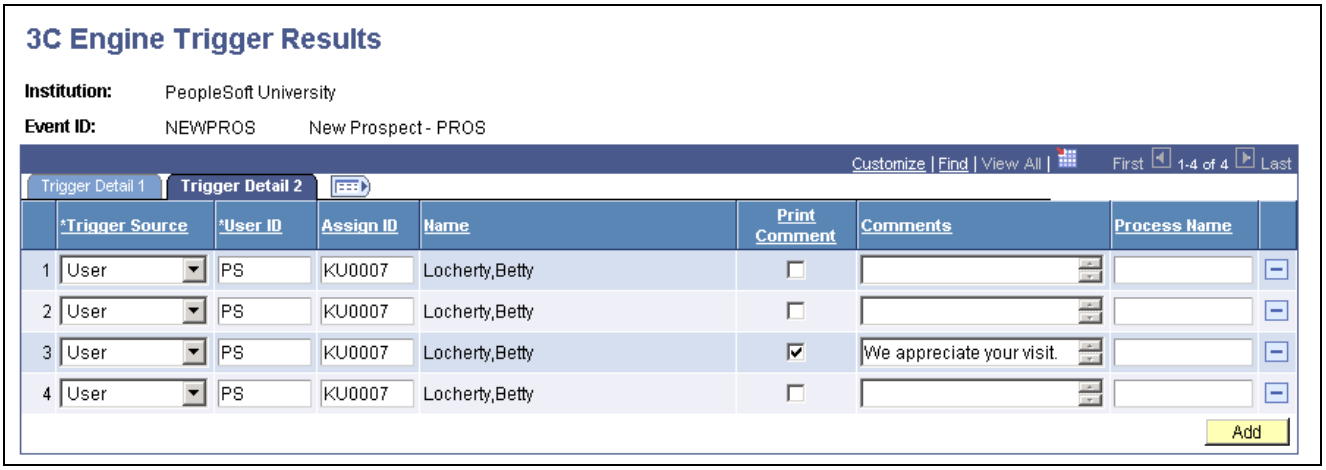
Function The system displays the administrative functional area of this 3C engine event.

Variable Data Click this link to access the Variable Data page, where you can view or change the variable data associated with this individual or organization.

Date Added Enter the date when this ID is added to the trigger. The default date is the current system date. You can override this value.

Viewing Additional Trigger Result Details

Access the 3C Engine Trigger Results page, Trigger Detail 2 tab.



3C Engine Trigger Results page - Trigger Detail 2 tab

Trigger Detail 2

Trigger Source Select the source to use to determine the individuals or organizations to include in this process.

Batch: The system automatically sets the trigger source to this value when the 3C engine background process processes this ID.

Online: The system automatically sets the trigger source to this value when a business transaction within the system triggers the 3C engine to process this individual.

User: The system automatically sets the trigger source to this value when you click Add to add a row and enter an additional ID on the Trigger Detail 1 tab page.

User ID Enter the ID of the user performing the business transaction that invoked the 3C engine trigger or the ID of the user who initiated the run of the process that resulted in the addition of this row.

Assign ID Enter the ID of the individual responsible for assigning this trigger.

Print Comment	Select this check box to include the comments in the Letter Generation data extract process.
Comments	The system displays the comments from the Event Definition detail page. You can change the comments and add enter additional comments.
Process Name	The 3C Engine does not use this field. You can use this field to process the ID using a different process, for example *Manual* or *Legacy* process.

Running the 3C Engine Process

This section provides an overview of the 3C engine process and discusses how to:

- Select the events to process in the background.
- Specify mass change parameters.
- Manage duplicate communication assignments.

Understanding the 3C Engine Process

Use PeopleSoft Process Scheduler to run the 3C engine background process and process 3C events in the background at a future time. You can run the process on the trigger table results, on mass change definitions, or on both.

When you run the background process on trigger table results, the communications, comments, and checklists identified by the 3C engine event are added or updated for the individuals or organizations specified in the rows on the Trigger Result page.

When you run the background process on mass change groups or definitions, the 3C engine uses the selection criteria definition and certain other mass change definitions to identify the individuals or organizations for which to add or update communications, checklists, and comments.

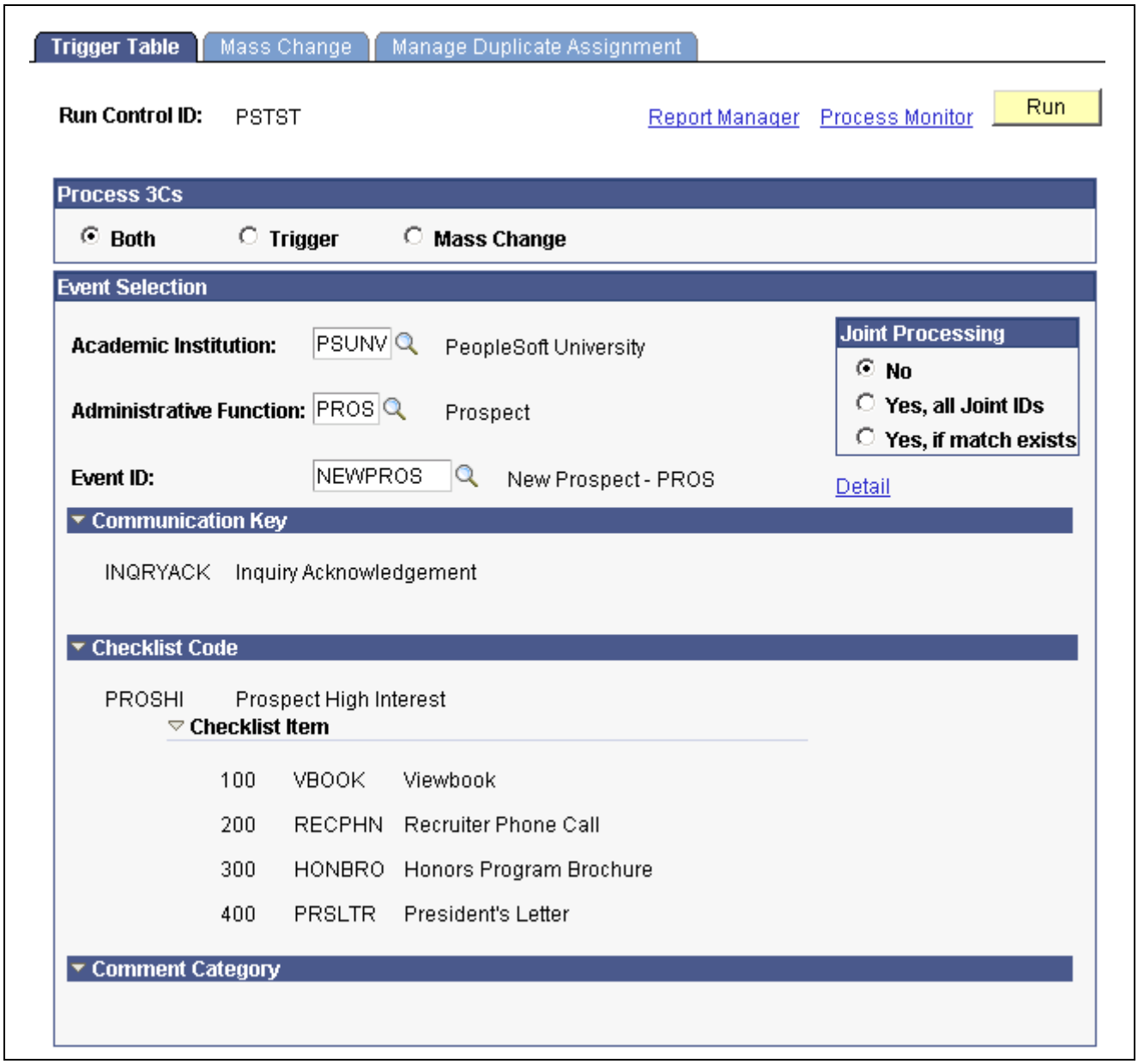
You can also specify conditions for the 3C engine to prevent assignment of duplicate communications.

Pages Used to Run the 3C Engine Process

Page Name	Object Name	Navigation	Usage
Trigger Table	RUN_CNTL_3CENGINE	Campus Community, 3C Engine, Run 3C Engine, Trigger Table	Select the events for the 3C engine process to process in the background.
Mass Change	RUN_CNTL_3C_MC	You can access this page through multiple navigation paths. Where possible, this list presents at least one path from each application. Campus Community, 3C Engine, Run 3C Engine, Mass Change	Specify mass change parameters to update communications.
Manage Duplicate Assignment,	MANAGE_DUP_ASSIGN	Campus Community, 3C Engine, Run 3C Engine, Manage Duplicate Assignment	Specify conditions for preventing duplicate communication and checklist assignment.

Selecting the Events to Process

Access the Trigger Table page.



Trigger Table page

Process 3Cs

Both Select this option to set the 3C engine background process to process, in the background, both the rows on the 3C Engine Trigger Results page in the background and the mass change group ID data specified on the Mass Change page in this component.

Trigger Select this option to set the 3C engine background process to process, in the background, only the rows on the 3C Engine Trigger Results page.

Mass Change Select this option to set the 3C engine background process to process, in the background, the mass change group ID data specified on the Mass Change page in this component.

Event Selection

Academic Institution Enter the institution whose data this program should process.

Administrative Function Enter the administrative functional area of the data that this program should process.

Event ID Enter the 3C engine event ID that this program should process.

Joint Processing

No Select this option if you do not want to apply joint communication rules to this process.

Yes, All Joint IDs Select this option to apply joint communication rules and include all communications set to enable joint communications.

Yes, if match exists Select this option to apply joint communication rules and include joint communications only when dates in the variable data fields match.

Communication Key

Specify the Comm Key for the communication that this program should add or update.

Checklist Code

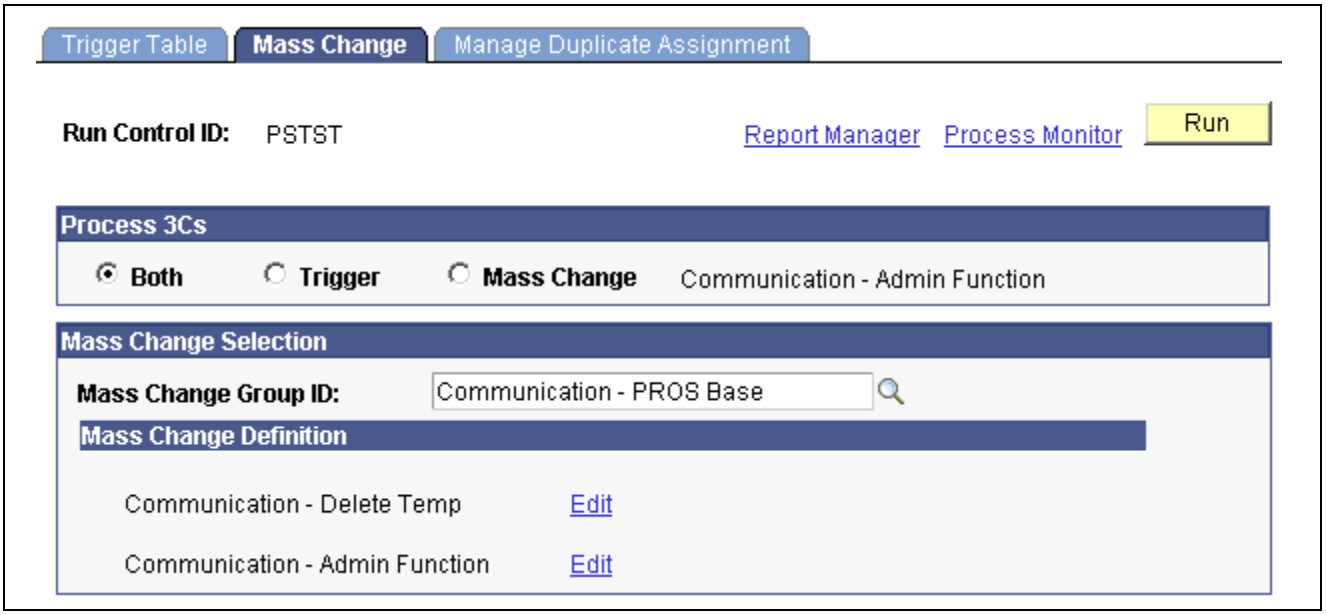
Specify the checklist code that this program should add or update.

Checklist Item

Specify the checklist item that this program should add or update.

Specifying Mass Change Parameters

Access the Mass Change page.



Mass Change page

Process 3Cs

Both Select this option to set the 3C engine background process to process, in the background, both the rows on the Trigger Result page in the background and the mass change group ID data specified on the Mass Change page in this component.

Trigger Select this option to set the 3C engine background process to process, in the background, only the rows on the Trigger Result page.

Mass Change Select this option to set the 3C engine background process to process, in the background, the mass change group ID data specified on the Mass Change page in this component.

Mass Change Selection

Mass Change Group ID Enter the group ID to process.

Mass Change Definition

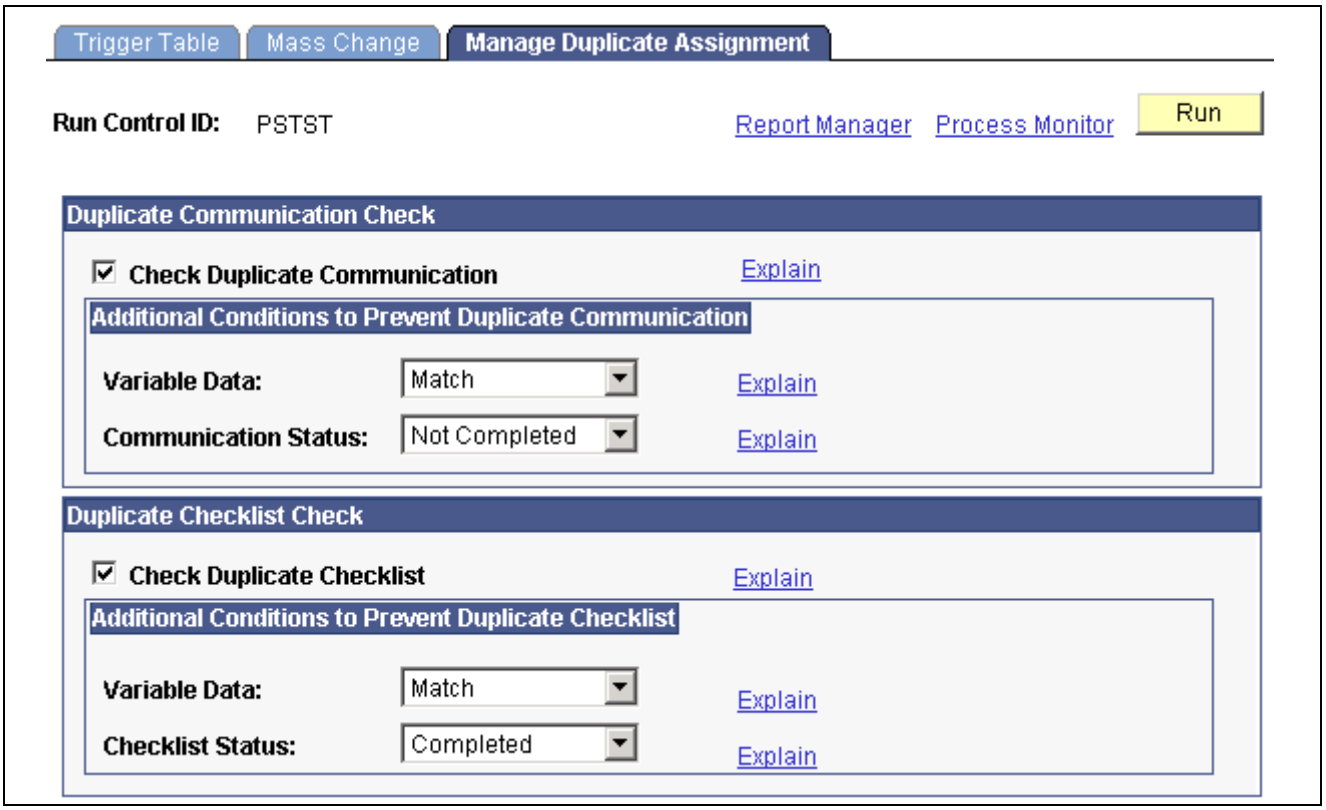
The system displays the mass change definitions assigned to the specified mass change group.

Edit Click this link to access the Student Administration page of the Mass Change component (the system launches a new window), where you can view and edit this mass change definition.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Using Mass Change".

Managing Duplicate Communication Assignments

Access the Manage Duplicate Assignment page.



Manage Duplicate Assignment page

Click the Explain link beside any item to display a message explaining the options and function of that item.

Duplicate Communication Check

Check Duplicate Communication

Select this check box to require the 3C engine to determine if a communication is a duplicate before assigning it.

When this option is selected and no additional conditions are specified, the engine does not assign the duplicate if it finds that a communication of that letter code is already assigned.

When this check box is not selected, the engine assigns the communication, whether or not it is a duplicate.

To evaluate if two communications are the same, the 3C engine compares these fields:

Label Name	Record Name
ID Type	SA_ID_TYPE
ID	COMMON_ID
Institution	INSTITUTION
Administrative Function	ADMIN_FUNCTION
Communication Category	COMM_CATEGORY

Label Name	Record Name
Communication Context	COMM_CONTEXT
Communication Direction	COMM_DIRECTION
Letter Code	LETTER_CD
ID Related	EMPLID_RELATED
Joint Communication	JOINT_COMM
Include Inclosure	INCLUDE_INCL

Additional Conditions to Prevent Duplicate Communication

Enter values in this area to specify whether the engine should compare variable data and status to further identify duplicates and prevent assignment.

Variable Data Specify the variable data conditions under which duplicates should not be assigned.

Match: If a communication matches a previously assigned communication and they have matching variable data, do not assign the communication.

Do Not Match: If a communication matches a previously assigned communication and their variable data do not match, do not assign the communication.

(Blank): Do not consider variable data.

Communication Status Specify the communication status under which duplicates should not be assigned.

Completed: If a communication matches a previously assigned communication for which the status is completed, do not assign the communication.

Not Completed: If a communication matches a previously assigned communication for which the status is not completed, do not assign the communication.

(Blank): Do not consider communication status.

Note. If a variable data and a communication status condition are both specified, then *both* conditions must be met to prevent assignment of the duplicate communication.

Duplicate Checklist Check

Check Duplicate Checklist Select this check box to require the 3C engine to determine if a checklist is a duplicate before assigning it. When this option is selected and no additional conditions are specified, the engine does not assign the duplicate if it finds that a similar checklist code is already assigned.

When this check box is not selected, the engine assigns the checklist, whether or not it is a duplicate.

To evaluate if two checklists are the same, the 3C engine compares these fields:

Label Name	Record Name
ID Type	SA_ID_TYPE
ID	COMMON_ID
Checklist Code	CHECKLIST_CD
Institution	INSTITUTION
Administrative Function	ADMIN_FUNCTION

CHAPTER 31

Managing Communications

This chapter lists prerequisites and common elements, provides an overview of communications, and discusses how to:

- Assign communications to an individual.
- Assign communications to an organization.
- Extract letter data.
- Review communications with an individual.
- Review communications with an organization.
- Use the sample templates.
- View communications reports.

See Also

Chapter 29, "Understanding the 3Cs—Communications, Checklists, and Comments," page 407

Chapter 30, "Using the 3C Engine," page 409

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Using Mass Change"

Prerequisites

Before assigning and managing communications, you must set up communications in the system.

See Also

Chapter 14, "Setting Up Communications," page 129

Common Elements Used in This Chapter

(communications)	Click to transfer to where you can add a new communication for the individual or organization
(checklists)	Click to transfer to where you can add a new checklist for the individual or organization.
(comments)	Click to transfer to where you can enter a new comment for the individual or organization.

View or Edit Click to transfer to where you can view or edit the communication assignment.

Note. The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Understanding Communication Management

Communication Management enables you to track and analyze all of your institution's contacts with students, staff, constituents, and organizations inside and outside the institution. You can track:

- All incoming and outgoing communications.
- All types of communication—letters, email, phone calls, personal contact, facsimiles, and so on.
- Communications generated by other offices that affect your office.
- All staff involved with a communication.
- You can assign communications to individuals, organizations, and groups of people. This chapter describes how to assign communications.

To assign a communication, you must select the method, category, context, direction, and letter code for that communication to identify the who, what, when, and how of each communication. This is how they correlate:

- Method = How
- Context = What
- Category = Why
- Direction = Where
- Date = When
- ID = Who

Use the communication management pages to manually assign communications to individuals or organizations. You can access the communication management pages as described here, or you can access them by clicking the Communication button on pages throughout the system.

You can assign communications to individuals and organizations manually, or you can use the 3C engine to automatically assign communications to individuals or organizations based on rules and conditions that you define.

See Chapter 30, "Using the 3C Engine," Defining 3C Engine Triggers, page 415.

You can indicate whether the communication is a phone conversation, a letter, or an in-person meeting with the individual. If the communication is a letter, you can manage the variable data and enclosures that should be included, and enter comments that you can choose to print or not print in the letter

In addition to creating communications for individuals, you can create communications for organizations. For example, you can send letters to schools announcing that an admissions counselor from your institution will be in their area on a certain date, or you can send bills to companies with which your institution does business.

When you are finished assigning letter communications, you can use your system to extract data about the recipients and use your word processing software to merge that data into a template. You create templates with your institution's word processing software, or you can use the sample Microsoft Word templates delivered with the system.

Use the inquiry pages to review communication information for an individual or an organization. You can enter criteria and search for a summary of communications or view details of the communication assignments. You can search for a summary of communications to determine if a specific communication was sent, if it included enclosures, and if it was a joint communication.

Note. You are able to view only those communications that are associated with the communication 3C groups to which you have security access. With 3C group inquiry access, you can view communication assignments, but you cannot change them. With 3C group update access, you can view and change the communications. Use the Operator 3C Groups Summary page to determine or change an individual's 3C group security status.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Setting User Defaults," Selecting the Type of 3C Group Access.

This procedure provides a high-level overview of the managing communications processes and the order in which they must be performed. Steps 1 through 5 are described in Setting Up Communications.

To generate and manage communications:

1. Set up codes for the standard letters that your institution wants to use.

   Each letter requires an administrative function.

2. Set up communication contexts.

   Contexts include methods, directions, and letter codes.

3. Set up communication categories.

   Categories are sets of communication contexts.

4. Set up communication 3C groups.

   3C groups are required for assigning security access for communications.

5. (Optional) Set up communication speed keys (Comm Keys).

   Comm Keys enable you to associate communication elements together and access them as a set, using the assigned shortcut code.

6. Assign communications to individuals or organizations

   You can assign communications to each of these manually or you can use the 3C engine to assign communications automatically in real time or in the background.

7. Review communications assigned to individuals or organizations.

   You can review the details of each communication. You can view a list of all communications assigned to them. You can also review the security access that users have for viewing or updating the communications.

8. Generate the communications.

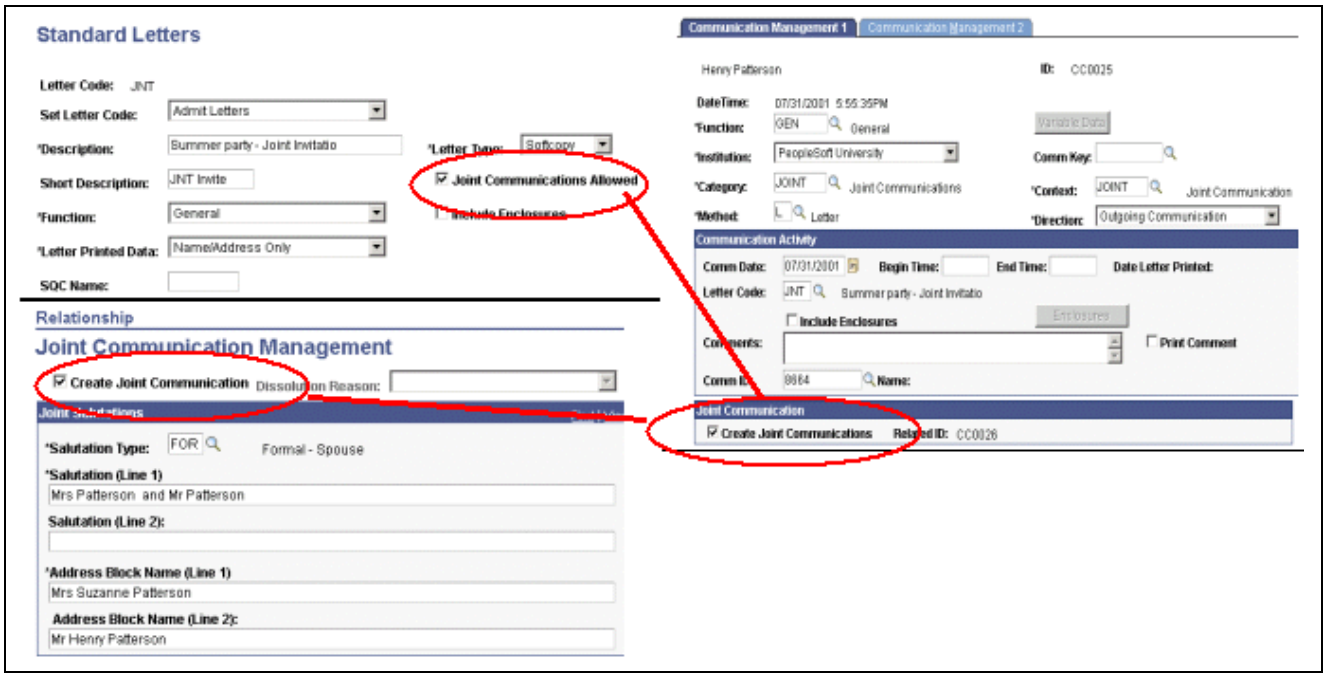
9. Review the data that was extracted by the letter generation process for each of the IDs processed.

Understanding Joint Communications

PeopleSoft Enterprise Campus Solutions enables you to communicate jointly with individuals at a common address rather than producing separate communications for each individual. For example, you can invite a married couple or two roommates to an event by sending a single invitation to their joint address.

Functions on the relationships and communications pages enable you to create joint communications for two individuals when at least one of the individuals exists in your database.

These examples show the joint communication features used in the system:



Using the joint communication features on the relationships and communications pages in the system—clockwise, the Joint Communication Management page (RELATION_SALU_SEC), the Communication Management 1 page (COMM_MGMT_1), and the Standard Letters page (SA_STNDR_LTR_TABLE)

Detailed information about each page where you select an option or enter data to manage joint communications is included in the appropriate places throughout the documentation. The following procedure provides a high-level overview of the process and indicates where the relevant pages are documented.

To set up joint communications functionality:

1. Design how the two names appear in the greeting and in the address portion of the letter by setting up the joint salutation on the Joint Salutation Type Table page.

   See Chapter 2, “Designing Campus Community,” Establishing Salutations, page 22.

2. Set the Default Salutation Type on the Installation Defaults - CC page.

   If no default salutation type is defined, the letter generation data extract process fails.

   See Chapter 2, “Designing Campus Community,” Reviewing or Defining Campus Community Installation Settings, page 6.

3. Create joint usages on the Name Usage page.

   Always include the default salutation type (from step 2) in usage orders for joint communications so the process does not fail due to the lack of a salutation.

   See Chapter 2, “Designing Campus Community,” Establishing Name Usages, page 16.

To generate a joint communication:

1. Set the letter code on the Standard Letters page to Allow Joint Communication.

   See Chapter 14, “Setting Up Communications,” Defining Standard Letter Codes, page 132.

2. Create the relationship on the Relationship page for the individual in your database. This includes clicking the Manage Joint Communication button to access the Joint Communication Management page, where you set the relationship to Create Joint Communication, and define the joint salutation.

   See Chapter 22, "Managing Biographical Information," Managing Relationships Data, page 234.

3. Identify the address to use for the joint communication and select the Joint Address check box on the Relationship Address page.

   See Chapter 22, "Managing Biographical Information," Managing Relationships Data, page 234.

4. Assign the communication to the individual in your database (if both individuals are in your database, assign the communication to only one).

   You can use the 3C engine to detect the related records and automatically assign the joint communication, or you can assign the communication manually on the Communication Management 1 and 2 pages where you assign communications to individuals.

   This includes selecting the Create Joint Communication check box at the bottom of the Communication Management 1 page. The check box is available for selection based on steps 1 and 2, when the ID has a relationship set to enable joint communications, and the letter code is also set to enable joint communications.

   See Chapter 30, "Using the 3C Engine," page 409.

   See Chapter 31, "Managing Communications," Assigning Communications to Individuals, page 441.

5. Run the PeopleSoft letter generation data extract process.

   The process creates an extract file containing the data to generate the joint communication, including the specified joint salutation and joint address.

   See Chapter 31, "Managing Communications," Extracting Letter Data, page 452.

6. Merge the extract file with the letter template to produce the joint communication and print the letter.

   You can use the sample CCLTRJNT Word template that is delivered with the system or another template created in Microsoft Word to merge the data and print the letter.

7. (Optional) Review communications and verify when they were sent, to whom they were sent, and if they were joint.

   You can review all communications in the system or review a summary of communications assigned to the primary individual or the related ID, if it exists. The joint communication is listed in the summary for both IDs even though the joint communication can be assigned to only one ID.

   See Chapter 31, "Managing Communications," Reviewing Communications with an Individual, page 461.

Understanding Letter Generation

You can extract data from your PeopleSoft Enterprise Campus Solutions system and use it to generate letters, labels, lists, envelopes, and so on. You can extract data from one individual ID, all individual IDs, or all organization IDs in your database. You specify the type of data to extract and then run the extract process. The system places the extracted data into a comma delimited (.csv) file, which is a standard format readable by most word processing programs. Then, using your institution's word processing software, you can merge the data into any of the templates that you have for the letter codes defined on the Standard Letters page, including the sample Word templates delivered with the system, and print the outcome.

For information about using your institution's word processing software to merge data and print letters, consult the manufacturer's documentation.

Before you can extract letter data, a communication record for the desired letter must be assigned to the intended recipients. For joint communications, it is preferable that you assign the communication to only one of the individuals. If you assign it to both, the letter generation process extracts the data for both IDs, and will print two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context, and specify a method of *Letter* and the direction of *Outgoing*. You can assign communications to individuals or organizations manually or using the 3C engine or mass change.

When the communication records exist, follow this procedure for extracting data and generating a letter:

To generate a letter:

1. Specify the data to extract for the letter, including the ID, address usage, address name, salutation, and letter code.
2. Specify the date to print on the letter, the date to use as the letter completed date, and the communication date selection range.
3. Specify any checklist items to include in the letter.
4. Run the Letters Data Extract process to extract the specified data.
5. Use your word processing program to merge the extracted data into the letter template.
6. Save the softcopy template with merged data, or use it to print the letter.

Specifying the parameters for extracting data for the letter includes selecting the letter to use, identifying the individuals or organizations whose data you want to extract, and specifying the types of data to extract. Use the run control pages, described in the following sections, to specify extract data parameters.

After defining all of the parameters for extracting data, run the data extract process. Unless you specify a different file path, the process places the data files in the temporary directory for the server. You can specify a shared folder on your local machine or on any valid network drive path.

When the process finishes, files with the appropriate file names are placed at the specified extract file path destination. If you select the .csv output, three files are created at the destination:

- CCLTR<LETTERCODE>.CSV for letters.
- CCLBL<LETTERCODE>.CSV for labels.
- CCLTRGEN.DAT file, which is coded to work with the Word templates delivered with the system.

For example, if you use the TRN letter code and you select the .csv output, the file for letters at the destination is CCLTRTRN.CSV.

Note. If you use a letter code for which you specified a unique SQC, you must place the SQC in the same directory as the CCLTRGEN.sqr and the CCLTRUNQ.sqc. You must also modify CCLTRNAM.SQC to look for the specific SQC.

You can review extracted data online for individuals and organizations on the Communication Letter Data pages.

When you run the letter generation data extract process, the data specified under Letter Printed Data for that letter code on the Standard Letter Table page are listed on the Communication Letter Data page for individuals, or on the Organization Communication Letter Data page for organizations. You can use these pages to review and confirm the data extracted for an individual or organization. For example, using the Communication Letter Data page, you can confirm the address to which the letter for a specific individual addressed.

The letter generation data extract process automatically formats extracted addresses to meet U.S. postal regulations for domestic and international mail. The format is reflected in the address listed on the appropriate Letter Data page.

If you set a relationship to generate a copy of communications for a separate recipient on the Communication Recipient page in the Relationships component, you can view the data extracted for that separate recipient on the Communication Recipient Data page described in this section.

Overview of the Sample Templates

The letter generation data extract process creates a .dat file for merging data from your system into Microsoft Word templates. The PeopleSoft system delivers sample Word templates. You can use the sample templates as delivered, modify them (unless otherwise indicated in the warning), or create your own Word templates. This table lists the sample templates and their corresponding letter codes.

Warning! Do *not* modify these PeopleSoft letter codes and Word templates: from HRMS, the letter codes and templates ACQ, ANO, CAN, CBR, CTR, DEP, DIV, IR, IS1, IS2, IS3, LAT, OF1, OF2, REV, and RSC; and from PeopleSoft Enterprise Financial Aid, the letter code or template FAN. Modifications to these values could require substantial programming effort. You can, however, modify any of the other delivered letter codes and templates to meet your institution's needs.

Letter Code	Description	Consult	Template Name
ACQ	Applicant-Consider Qualifications	HRMS	LTRACQ.DOC
ANO	Applicant-No Current Openings	HRMS	LTRANO.DOC
APP	Appointment Mailer	NA	CCLTRAPP.DOC
AV1	Gift Acknowledgement	NA	CCLTRAV1.DOC
AV2	Gift Receipt	NA	CCLTRAV2.DOC
CAN	Training Cancellation Letter	HRMS	LTRCAN.DOC
DAF	Disciplinary Action Filing	HRMS	LTRDAF.DOC

Letter Code	Description	Consult	Template Name
DAR	Disciplinary Action Resolution	HRMS	LTRDAR.DOC
F01	Frosh Application Acknowledgment	NA	CCLTRF01.DOC
F02	Frosh Missing Requirements	NA	CCLTRF02.DOC
F03	Frosh Admit Regular	NA	CCLTRF03.DOC
FAN	Financial Aid Notification	FA	FANLTR.DOC
GRF	Grievance Filing	HRMS	LTRGRF.DOC
GRR	Grievance Resolution	HRMS	LTRGRR.DOC
IHC	International Health Coverage	NA	CCLTRIHC.DOC
IN1	Initiative Appeal	NA	CCLTRIN1.DOC
IR	Applicant Interview-Rejection	HRMS	LTRIR.DOC
IS1	Interview Schedule-Level 1	HRMS	LTRIS1.DOC
IS2	Interview Schedule-Level 2	HRMS	LTRIS2.DOC
IS3	Interview Schedule-Level 3	HRMS	LTRIS3.DOC
JNT	Summer party - Joint Invitation	NA	CCLTRJNT.DOC
LAQ	Acknowledgement Letter	HRMS	LTRLAQ.DOC
MAD	Mid-Term Academic Deficiency	NA	CCLTRMAD.DOC

Letter Code	Description	Consult	Template Name
MB1	Membership Card	NA	CCLTRMB1.DOC
OF1	Job Offer to Applicant-Offer 1	HRMS	LTROF1.DOC
OF2	Offer Letter 2-Offer 2	HRMS	LTROF2.DOC
OFR	Early Offer Letter	NA	CCLTROFR.DOC
OPR	web Operator Notification	NA	CCLTROPR.DOC
P01	Inquiry Acknowledgment	NA	CCLTRP01.DOC
REC	Admit Recipient Letter	NA	CCLTRREC.DOC
RSC	Training Rescheduled Letter	No (HRMS)	LTRRSC.DOC

Assigning Communications to Individuals

This section discusses how to:

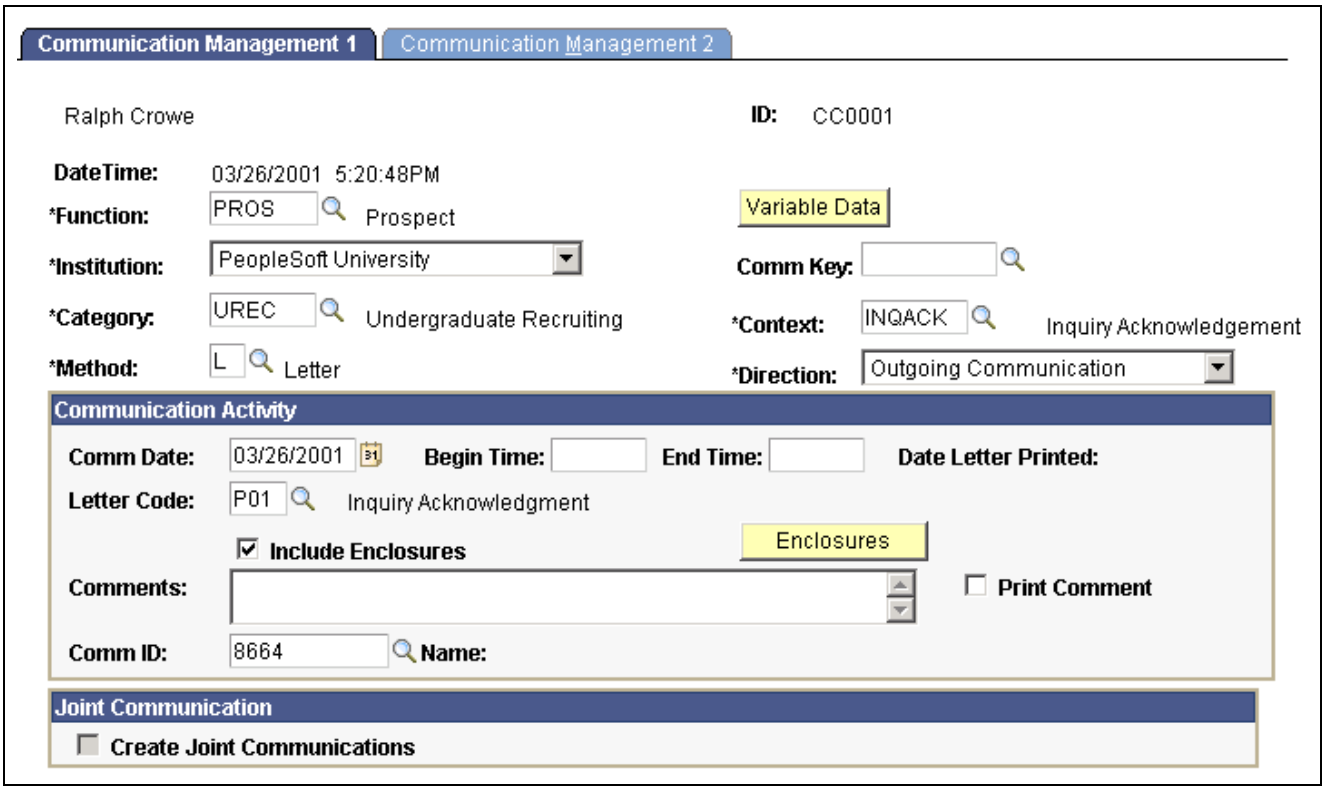
- Assign a communication to an individual.
- Review or update variable data for an individual.
- Add or delete enclosures.
- Determine the communication status.

Pages Used to Assign Communications to Individuals

Page Name	Object Name	Navigation	Usage
Communication Management 1 and Communication Detail 1	COMM_MGMT1	• Campus Community, Communications, Person Communications, Communication Management • Campus Community, Communications, Person Communications, Communication Detail	Assign or view details of a communication to an individual.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Communication Management 1 page.	Review or edit variable data for an individual.
Communication Management 2 and Communication Detail 2	COMM_MGMT2	• Campus Community, Communications, Person-Communications, Communication Management, Communication Management 2 • Campus Community, Communications, Person-Communications, Communication Detail, Communication Detail 2	Enter or review the status of the communication outcome.
Communication Enclosure	ENCL_TBL_SEC	Click the Enclosures button on the Communication Management 1 page.	Review, add, or delete enclosures when assigning a communication.

Assigning a Communication to an Individual

Access the Communication Management 1 page.



Communication Management 1 page

Note. If you transferred to this page by clicking the Communication button on another page, the administrative function of the functional area of the first page, along with the academic institution and all the variable data associated with the administrative function, transfers here. If you did not transfer here from a functional area, you must enter the function, institution, and variable data.

Function Enter the code for the functional area that includes this communication.

Available function codes are from the Administrative Functions page.

Variable Data Click this button to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

Institution Specify the institution responsible for this communication.

Comm Key Enter the name of the communication speed key that contains the communication category, communication context, method, direction, and letter code for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category Enter the category code for this communication.

Available category codes are from the Communication Categories page.

Context Enter the context code for this communication.

Available context codes are from the Communication Contexts page.

Method Enter the method for this communication.

Only the methods associated with the specific context on the Communication Contexts page are available from the prompt list.

Direction Select the direction for this communication.

Only the directions associated with the specific context on the Communication Contexts page are available from the prompt list.

Communication Activity

Comm Date (communication date) The default communication date is the system's current date. You can override this date.

Begin Time The default begin time is the system time when the communication is entered and saved.

You can manually override the begin time.

End Time The system calculates and displays the end time based on the begin time and the duration.

You can manually override the end time.

Date Letter Printed The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.

Letter Code The code, from the Standard Letters page, for this communication. The letter codes available are those associated with the context and function selected for this communication.

Include Enclosures If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the this check box for you. You can then click the Enclosures button to review, add, or delete the set enclosures.

If the letter is not set up to include enclosures, you can manually select this check box to include enclosures now, and click the Enclosures button to add the desired enclosures.

Enclosures This button is available when the Include Enclosures check box is selected. Click to access the Communication Enclosure page where you can review, add, or delete enclosures.

Comments Enter comments to further identify or describe the communication for this individual.

If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.

Print Comment Select this check box to print comments on the communication.

Comm ID (communication ID) Enter the ID of the staff person who communicated with or is initiating this communication with the individual.

Joint Communication

Create Joint Communications

This check box is available only if the individual to whom you are assigning the communication has a relationship on the Relationships page set to allow joint communications, and if the letter code on the Standard Letters page is set to allow joint communications.

When available, select this check box to address the communication jointly to this individual and the related individual identified on the Relationships page.

See Chapter 31, "Managing Communications," Understanding Joint Communications, page 435.

Reviewing or Updating Variable Data

Access the Variable Data page.

Variable Data page

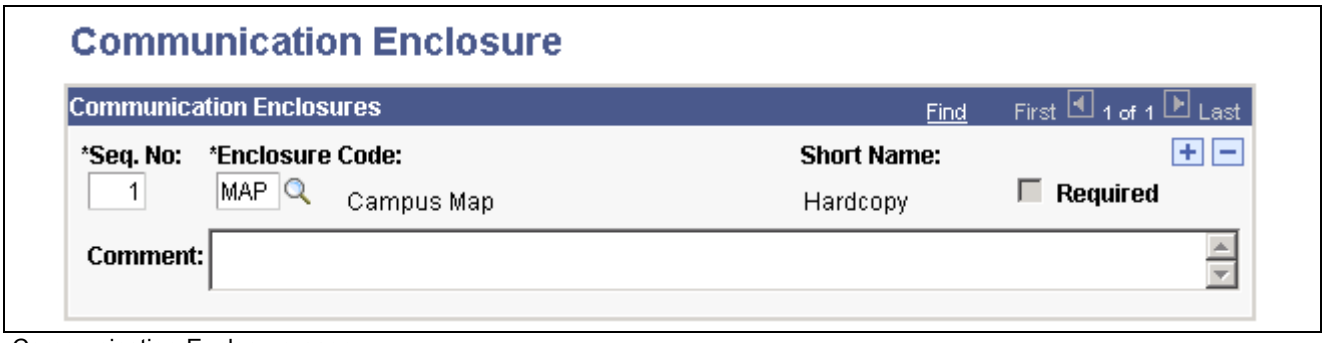
Different fields and data appear on this page based on the administrative function selected on the Communication Management 1 page.

See Also

Chapter 13, "Setting Up Administrative Functions," page 123

Adding or Deleting Enclosures

Access the Communication Enclosure page.



Communication Enclosure page

Note. When an enclosure is set as required for a letter on the Standard Letters page, information for that enclosure is visible but not available on the Communication Enclosure page. Thus, users are prevented from deleting an enclosure that your institution has decided is required.

Seq. No (sequence number)

The system automatically enters the next sequential number, up to 10, for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures for this communication.

When you run the letter generation data extract process, the process lists, in the order identified here, up to 10 maximum enclosures on the main letter.

Enclosure Code Enter the code for the letter that is to be included as an enclosure for this communication.

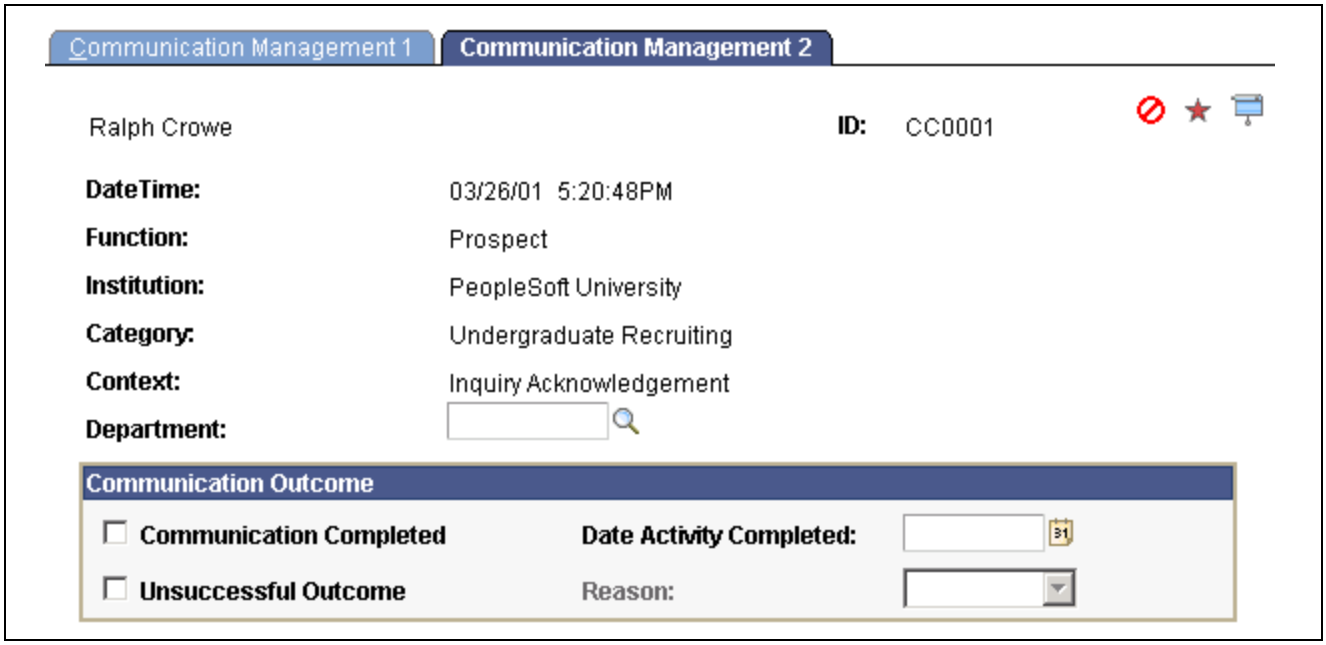
The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code field prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page.

Enclosure Type The system automatically displays the type of output *(Hardcopy* or *Softcopy)* associated with the selected enclosure letter code.

Required Select this check box to indicate the specific enclosure must accompany this communication at all times.

Determining the Communication Status

Access the Communication Management 2 page.



Communication Management 2 page

Department (Optional) Enter the department within your institution that is responsible for assigning this communication.

Available departments are from the Department Profile page.

Checklist Association

This group box appears only when the communication is created as part of a checklist.

Sequence The checklist sequence, from the Checklists page.

Item Sequence The checklist item sequence number, from the Checklists page, that created this communication.

Communication Outcome

When you run the letter generation data extract process, the system automatically completes fields and selects check boxes in this group box to indicate the outcome of the communication. If you do not use the letter generation data extract process, you must complete these fields.

Communication Completed Indicates that the communication was successfully completed. For example, the communication is complete if the phone call was made or if the letter was sent. In the case of the letter generation data extract process, the communication is complete if the data was extracted according to the option selected on the run control page.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Date Activity Completed The default completion date is the date when the communication completed option is selected. You can manually override this date.

Note. When you update the status of a communication that is related to a checklist item, the system displays a message reminding you to also update the status of the checklist item.

Unsuccessful Outcome When selected, indicates that the communication was unsuccessful. For example, no one answered the phone, or the letter was returned undeliverable. In the case of the letter generation data extract process, an unsuccessful outcome means that the process was unable to successfully extract all the data for this communication.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Reason Available when the Unsuccessful Outcome check box is selected. Indicates the reason that the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful. In the case of the letter generation data extract process, the system selects *Critical* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Values for this field are delivered with the system as translate values. Except for the *Critical* value, which you should not modify, you can modify these translate values.

Assigning Communications to an Organization

This section lists prerequisites and discusses how to:

- Assign a communication to an organization.
- Review or update variable data for an organization.
- Add or delete enclosures.
- Enter or review the communication status.

Prerequisites

Before assigning communications to an organization, define the organization's data, including its location, department profile, and contact person.

See Also

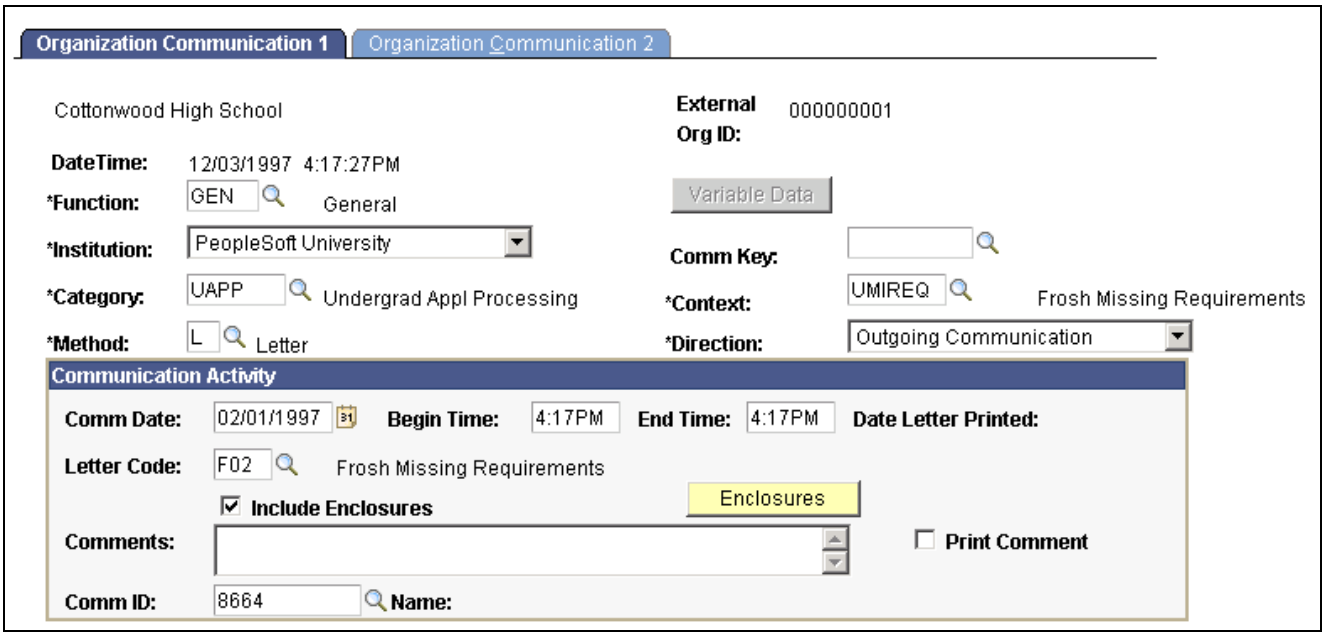
Chapter 35, "Managing Organization Data," page 525

Pages Used to Assign a Communication to an Organization

Page Name	Object Name	Navigation	Usage
Organization Communication 1 and Org Communication 1	ORG_COMM_MGMT1	• Campus Community, Communications, Organization Communications, Communication - Organization, Organization Communication 1 • Campus Community, Communications, Organization Communications, Communication - Organization, Org Communication Detail, Org Communication 1	Create a communication for an organization.
Organization Communication 2 and Org Communication 2	ORG_COMM_MGMT2	• Campus Community, Communications, Organization Communications, Communication - Organization, Organization Communication 2 • Campus Community, Communications, Organization Communications, Communication - Organization, Org Communication Detail, Org Communication 2	Enter or view additional data for a communication with an organization.

Assigning a Communication to an Organization

Access the Organization Communication 1 page.



Organization Communication 1 page

Note. If you transfer to this page by clicking the Communication button on another page, the administrative function associated with the functional area where you were, along with the institution and variable data associated with that functional area, transfers. If you did not transfer from a functional area, you must enter the function, institution, and variable data.

Function The code, from the Administrative Functions page, for the functional area that includes this communication.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data also transferred.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

Institution The institution responsible for this communication.

Comm Key The name of the communication speed key that contains the communication category, communication context, method, direction, and letter code for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category The category, from the Communication Categories page, for this communication.

Context The context, from the Communication Contexts page, for this communication.

Method The method, from the Communication Contexts page, for this communication. Only those methods associated with the specific context are available from the prompt list.

Direction The direction, from the Communication Contexts page, for this communication. Only those directions associated with the specific context are available from the prompt list.

Communication Activity

Comm Date (communication date) The default communication date is the system's current date. You can override this date if necessary.

Begin Time The default begin time is the system time when the communication is entered and saved.

You can manually override the begin time as necessary.

End Time The system calculates and displays the end time based on the begin time and the duration.

You can manually override the end time as necessary.

Date Letter Printed The date when the communication, if a letter, was produced by running the letter generation data extract process. This field indicates that letter extract data was successfully completed for this communication.

Letter Code The code, from the Standard Letters page, for this communication. The letter codes available are those associated with the context and function selected for this communication.

Include Enclosures When selected, indicates that this communication includes enclosures.

If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects the Include Enclosures check box. You can then click the Enclosures button to review, add, or delete the set enclosures.

If the letter is not set up to include enclosures, you can select the check box to include enclosures now, and click the Enclosures button to add the desired enclosures.

Enclosures Available when the Include Enclosures check box is selected. Click this button to access the Communication Enclosure page, where you can review, add, or delete enclosures.

Comments Enter comments to further identify or describe the communication for this organization.

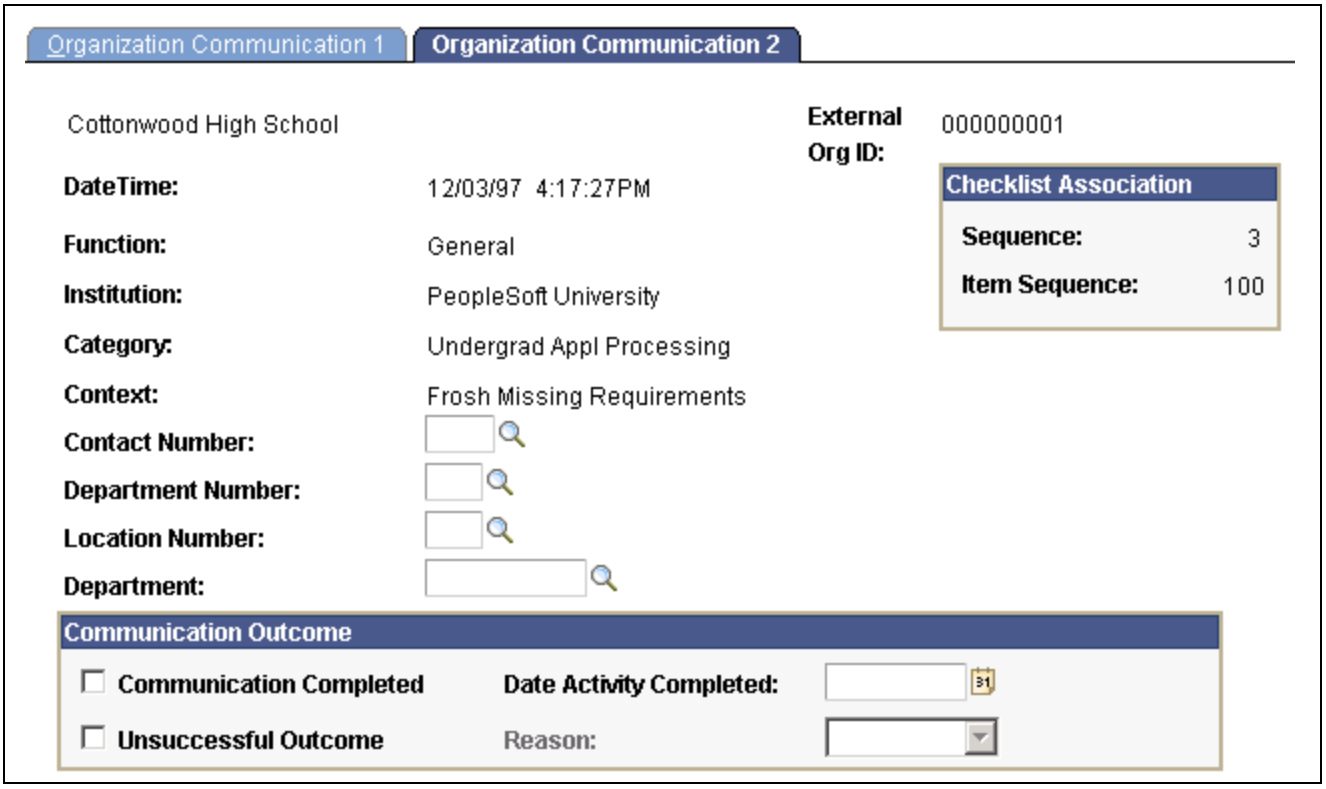
If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.

Print Comment When selected, indicates that the comments should be printed on the communication.

Comm ID (communication ID) The ID of the staff person who communicated with or is initiating this communication with the organization.

Determining the Communication Status

Access the Organization Communication 2 page.



Organization Communication 2 page

Contact Number Enter the ID of the contact person, from the Organization Contacts page, to whom you are sending this communication.

Department Number Enter the number of the contact department, from the Organization Departments page, to which you are sending this communication.

Location Number Enter the number of the location, from the Organization Locations page, to which you are sending this communication.

Department (Optional) Enter the department within your institution, from the Department Profile page, that is responsible for or assigning this communication.

Checklist Association

This group box appears only when the communication is created as part of a checklist.

Sequence The checklist sequence, from the Checklists page.

Item Sequence The checklist item sequence number, from the Checklists page, that created this communication.

Communication Outcome

When you run the letter generation data extract process, the system completes fields and selects check boxes in this group box to indicate the outcome of the communication. If you do not use the letter generation data extract process, you must complete these fields.

Communication Completed When selected, indicates that the communication was successfully completed. For example, the communication is complete if the phone call was made or if the letter was sent. In the case of the letter generation data extract process, the communication is complete if the data was successfully extracted according to the option selected on the run control page.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Date Activity Completed The default completion date is the date when the communication completed option is selected. You can manually override this date.

Unsuccessful Outcome When selected, indicates that the communication was unsuccessful. For example, no one answered the phone, or the letter was returned undeliverable. In the case of the letter generation data extract process, an unsuccessful outcome means that the process was unable to successfully extract all the data for this communication.

If you are using a communication speed key, the system might select this check box for you depending on information associated with that Comm Key.

Reason Available when the Unsuccessful Outcome check box is selected. Indicates the reason that the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful. In the case of the letter generation data extract process, the system selects *Critical* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Reason values are delivered with the system as translate values. Except for the *Critical* value, which you should not modify, you can modify these translate values.

Extracting Letter Data

This section lists prerequisites and discusses how to:

- Specify general parameters for extracting data.
- Specify parameters for merging the data.
- Specify parameters for extracting and updating any checklist data.
- Run the letter generation data extract process.
- Review and edit extracted data.

Prerequisites

Before identifying data to extract and merge into letters or other communications output, design your Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups.

See Also

Chapter 2, “Designing Campus Community,” page 5

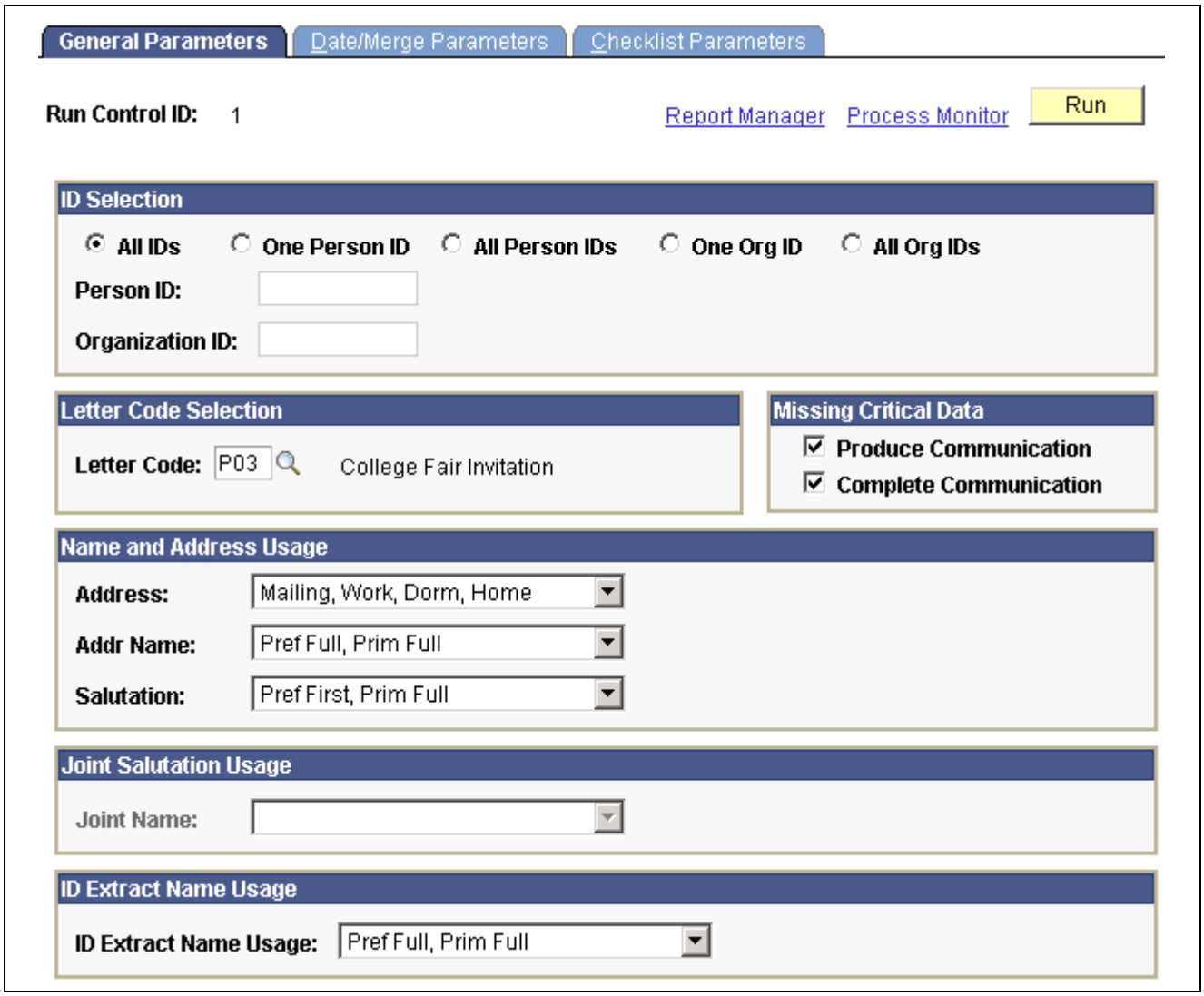
Chapter 16, “Setting Up Checklists,” page 149

Pages Used to Extract Letter Data

Page Name	Object Name	Navigation	Usage
General Parameters	RUNCTL_LTRGEN1	Campus Community, Communications, Letter Generation, General Parameters	Specify general parameters for extracting letter data, including the IDs for which data is to be extracted, the letter code into which the data should be merged, the name and address usages to use, and the joint salutation (if appropriate).
Date/Merge Parameters	RUNCTL_LTRGEN2	Campus Community, Communications, Letter Generation, Date/Merge Parameters	Specify the necessary file locations, dates, and sort option for extracting data.
Checklist Parameters	RUNCTL_LTRGEN3	Campus Community, Communications, Letter Generation, Checklist Parameters	Specify any checklist items to extract and use in a letter.
Communication Letter Data	COMM_LTR_DATA	Campus Community, Communications, Person Communications, Communication Letter Data	View letter data extracted for an individual.
Communication Recipient Data	COMM_RECPNT_DATA	Campus Community, Communications, Person Communications, Communication Letter Data, Communication Recipient Data	View address data extracted for a letter.
Organization Communication Letter Data	ORGCOMM_LTR_DATA	Campus Community, Communications, Organization Communications, Org Communication Letter Data	View letter data extracted for an organization.

Specifying General Parameters

Access the General Parameters page.



General Parameters page

ID Selection

All IDs — Select to extract the data from all IDs (person IDs and organization IDs) that are assigned a communication with the letter code indicated and that are not marked complete.

One ID — Select to extract the data from the one individual ID indicated. The communication with the indicated letter code must be assigned to this individual.

If you select the One ID option, specify the individual's ID in the Person ID field.

All Person IDs — Select to extract the data from all the individuals' IDs that are assigned a communication with the letter code indicated.

One Org ID (one organization ID) — Select to extract the data from the one organization ID indicated. The communication with the indicated letter code must be assigned to this organization.

If you select the One Org ID option, specify the organization's ID in the Organization ID field.

All Org IDs (all organization IDs) Select to extract the data from all the organization IDs that are assigned a communication with the letter code indicated and that are not marked complete.

Letter Code Selection

Letter Code Enter the letter code that identifies the template into which to merge this extract data.

Only those letter codes to which you have 3C group security access are available from the list.

Missing Critical Data

Produce Communication Select this check box for the process to produce the extract file even if critical data is missing (for example, address information or name of the recipient).

Complete Communication Select this check box for the process to set the status to *Complete* on the Communication Management 2 page, even if critical data is missing.

Name and Address Usage

Name and address usages apply to letters addressed to individuals. They do not apply to letters for organizations.

Address Enter the type of address, from the Address Usage page, to extract for this letter.

You can list address types in a preferred search-and-use order. For example, if you list *Mailing, Billing,* or *Home,* the system searches for the mailing address first; if none exists, then the billing address; if none exists, the home address last.

Addr Name (address name) Enter the type of name, from the Name Usage page, to extract for the address section of this letter.

As with addresses, you can list address name types in a preferred search-and-use order.

Salutation Enter the type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this letter.

For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave).

As with addresses, you can list salutation name types in a preferred search-and-use order.

Joint Salutation Usage

Joint Name The Joint Name field is available when the selected letter code is set on the Standard Letters page to allow joint communications. The joint names available in the list are those with the Joint Usage check box selected on the Name Usage page.

The process extracts this salutation name usage for IDs set up for joint communications.

ID Extract Name Usage

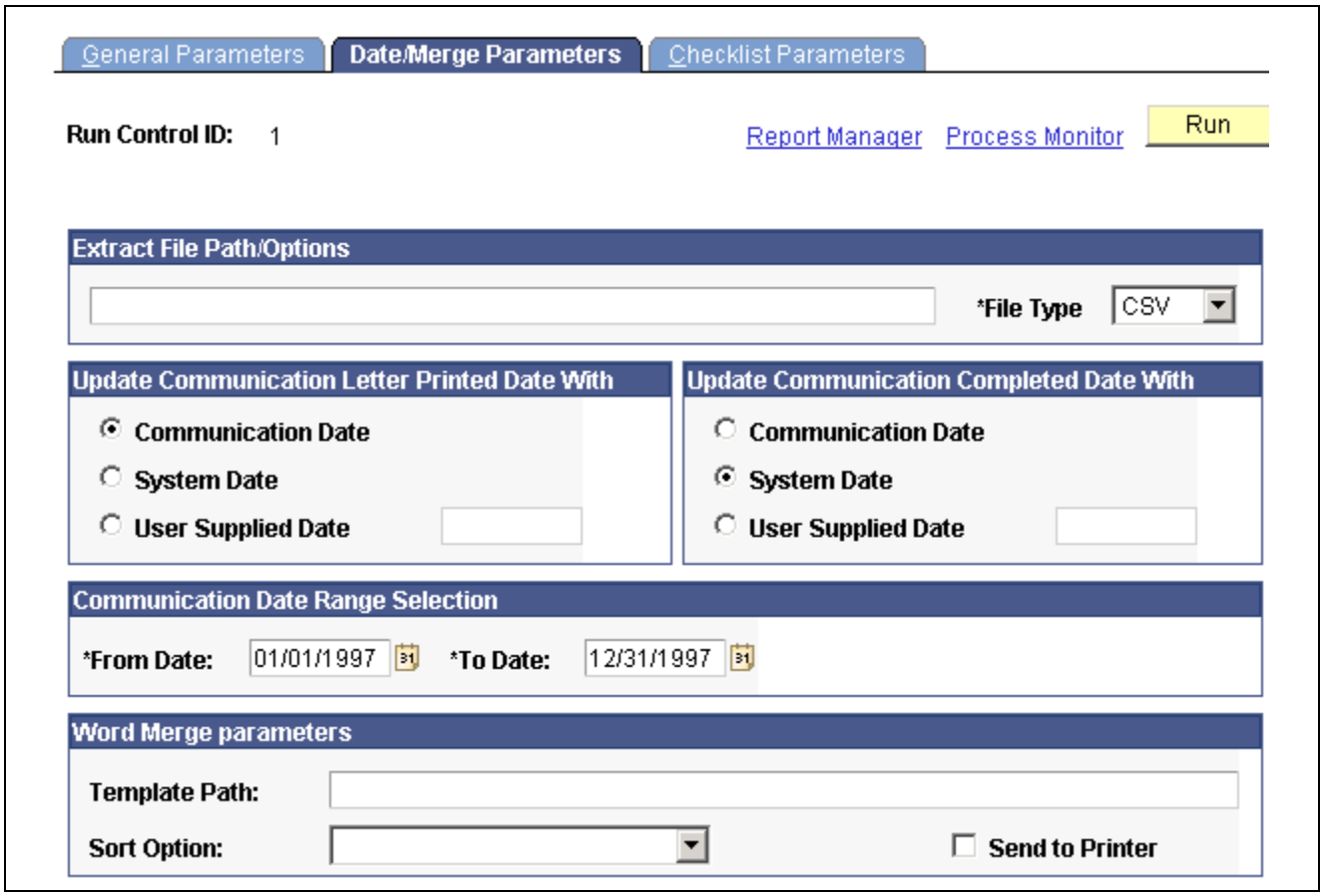
ID Extract Name Usage Enter the type of name to extract for any occurrence marked *ID* in the text of the letter template.

For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say "We are sure the Dominguez family will enjoy participating in this event."

As with addresses, you can list ID name types in a preferred search-and-use order.

Specifying Date/Merge Parameters

Access the Date/Merge Parameters page.



Date/Merge Parameters page

Extract File Path/Options

The server temporary directory is the default location for the .cvs and .dat extract files. If you want the system to place the files elsewhere, specify the correct path here.

The path must be a valid network path, containing the path delimiter (forward slash or back slash), and be in the appropriate letter case (upper or lower) for your platform. For example, on Windows NT where the target machine is Machine01 and the target folder is LtrData, the valid path is \\Machine01\temp\LtrData\.

File Type Select the file type (*CSV* or *Other)* to create an extract file compatible with your word processing program. Comma delimited (.csv) files are compatible with most word processing programs.

The process also creates a .dat file specifically for Microsoft Word and the Word templates delivered with the system.

Update Communication Letter Printed Date With

Select the date to appear on the letter.

Communication Date Select to use the communication date as the letter printed date on the Communication Management 1 page.

System Date Select to extract the current system date for the date of the letter.

User Supplied Date Select to use the specified date as the date of the letter. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record (Communication Management 2 page).

Communication Date Select to use the date when the communication was assigned as the communication completed date on the Communication Management 2 page.

System Date Select to use the current system date as the communication completed date on the Communication Management 2 page.

User Supplied Date Select to use the specified date as the communication completed date on the Communication Management 2 page. You must supply the desired date.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from those IDs to which you assigned a specific letter between January 1 and March 1 of the current year.

Use the date range to schedule and manage letter communications. For example, you might schedule daily or weekly runs of the letter generation data extract process for prospect inquiry letters, or missing information letters for applicants.

From Date The beginning date of the inclusive date range selection.

To Date The ending date of the inclusive date range selection.

Word Merge Parameters

If you are using the sample Word templates delivered with the system or if you are using other templates created in Microsoft Word, specify parameters here. A macro (CCLTRGEN.DOT) built into the delivered Word template process uses these parameters when performing a letter merge.

If you are not using Microsoft Word, you can skip these fields.

Note. Setting these parameters on the Letter Generation run control page affects the data included in the CCLTRGEN.DAT file, but does not invoke the Word merge process. To perform a letter merge, you must launch Word and perform the merge process.

Template Path Enter the file path to the template into which the process should merge the data.

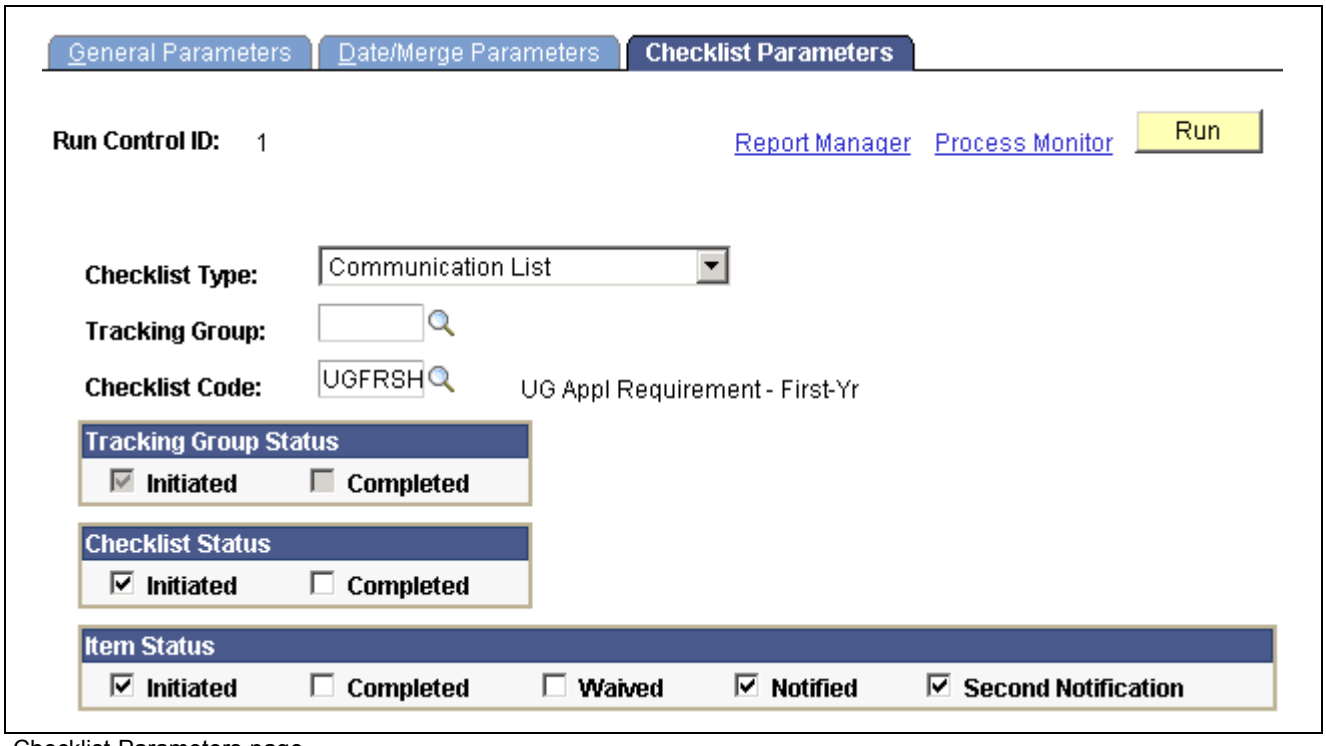
Sort Option Enter the order in which the process should sort the merged letters.

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

Send to Printer Select for the Word letter merge process to automatically send the letter with merged data to the printer.

Specifying Checklist Parameters

Access the Checklist Parameters page.



Checklist Parameters page

Checklist Type Enter the type of checklist from which the process should extract data for this letter.

Tracking Group Enter the tracking group whose checklist data the process should extract for this letter.

Checklist Code Enter the specific checklist code whose checklist item data the process should extract for this letter.

Tracking Group Status

If you specified a tracking group, you must also select a tracking group status. You can select more than one status option.

Initiated Select to extract tracking group data with the status of *Initiated* for this letter.

Completed Select to extract tracking group data with the status of *Completed* for this letter.

Checklist Status

Initiated Select to extract data from checklists with the status of *Initiated* for this letter.

Completed Select to extract data from checklists with the status of *Completed* for this letter.

Item Status

If you specified a checklist code, you must select a checklist item status. You can select more than one status option.

Initiated Select to extract data from checklist items with the status of *Initiated* for this letter.

Completed Select to extract data from checklist items with the status of *Completed* for this letter.

Waived Select to extract data from checklist items with the status of *Waived* for this letter.

Notified Select to extract data from checklist items with the status of *Notified* for this letter.

Second Notification Select to extract data from checklist items with the status of *Second Notification* for this letter.

Running the Data Extract Process

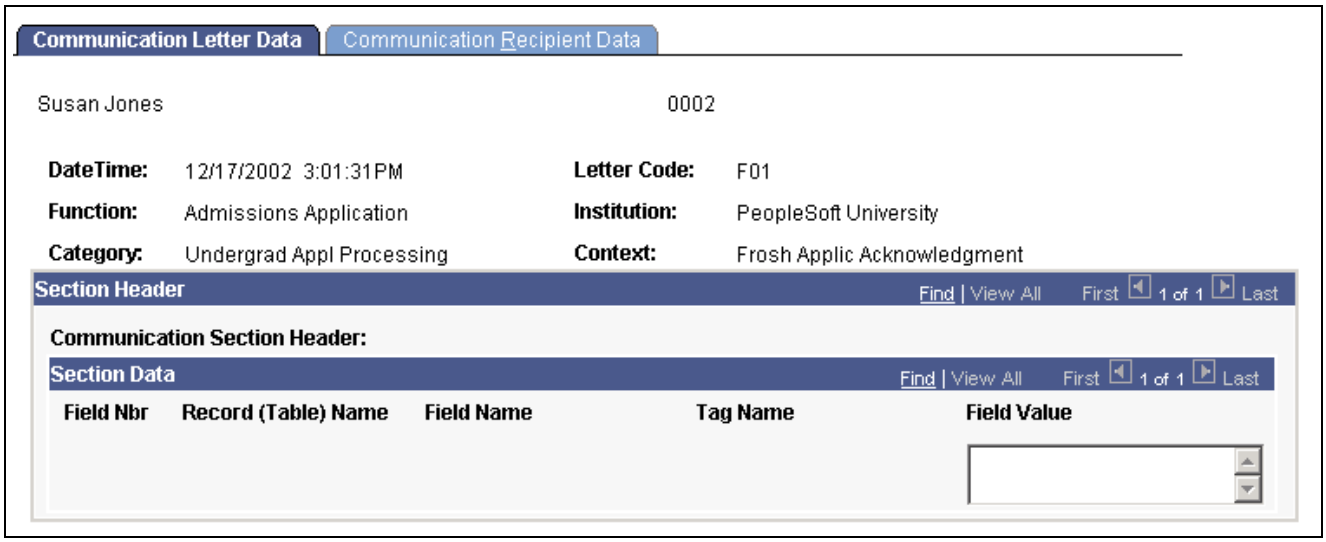
After you specify the extract parameters, you can run the CCLTRGEN data extract process by clicking the Run button from the General Parameters page, the Date/Merge Parameters page, or the Checklist Parameters page.

Note. Setting parameters on these run control pages affects the data included in the CCLTRGEN.DAT file; however, it does not invoke the merge process. To perform a merge, you must launch the merge process provided from within your institution's word processing software. If you want to merge the extract data into any of the sample templates (or other Word templates), you must launch Word and perform Word's Mail Merge process.

Note. The default output for CCLTRGEN is .csv. This is defined within the CCLTRGEN program. Selecting Type and Format field values on the Process Scheduler Request page does not change this output.

Reviewing Extract Data Online for Individuals

Access the Communication Letter Data page.

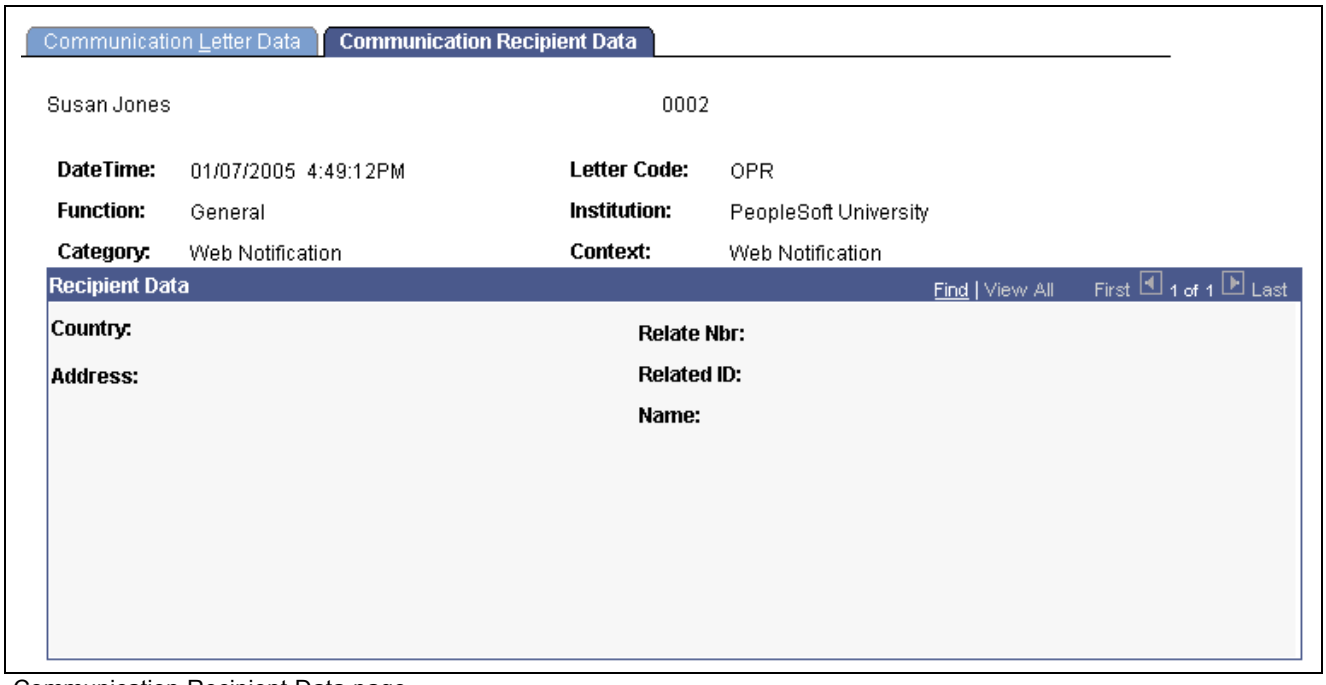


Communication Letter Data page

The Communication Letter Data page is for viewing purposes only. You cannot enter or modify data here. Information on this page is controlled from the Letter Printed Data value set on the Standard Letter Table page.

Reviewing Extract Data for an Additional Recipient

Access the Communication Recipient Data page.

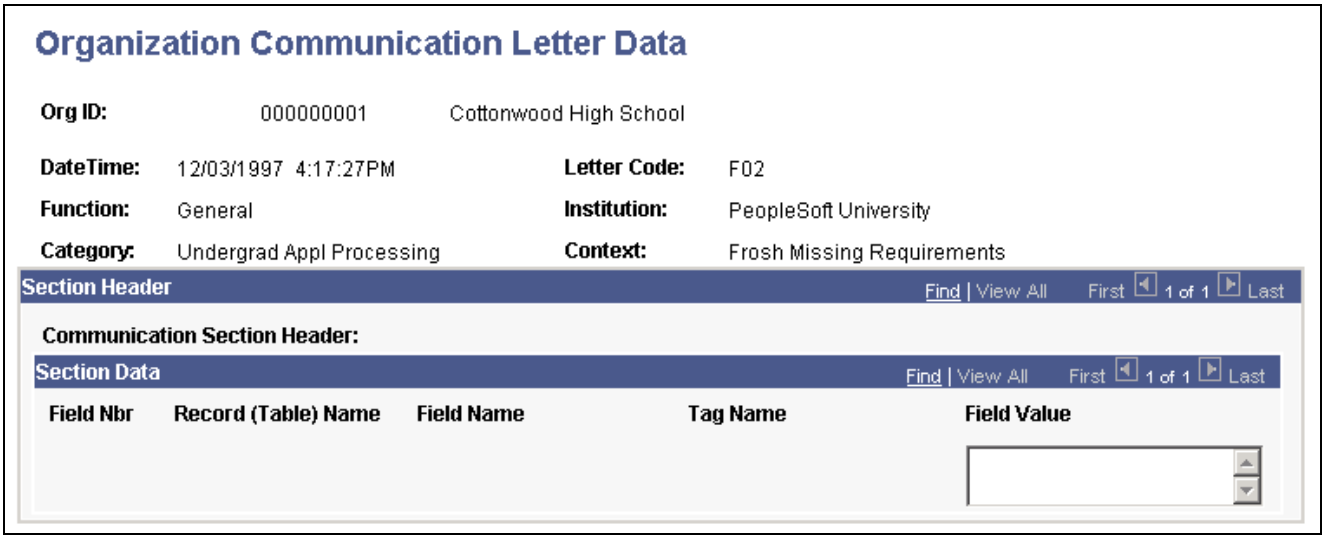


Communication Recipient Data page

The Communication Recipient Data page is for viewing purposes only. You cannot enter or modify data here. Information appears on this page only if you have set up a separate recipient on Communication Recipient page in the Relationships component for the specified letter code.

Reviewing Extract Data for an Organization

Access the Organization Communication Letter Data page.



Organization Communication Letter Data page

The Organization Letter Data page is for viewing purposes only. You cannot enter or modify data here. Information on this page is controlled from the Letter Printed Data value set on the Standard Letter Table page.

Reviewing Communications with an Individual

This section provides an overview of how to:

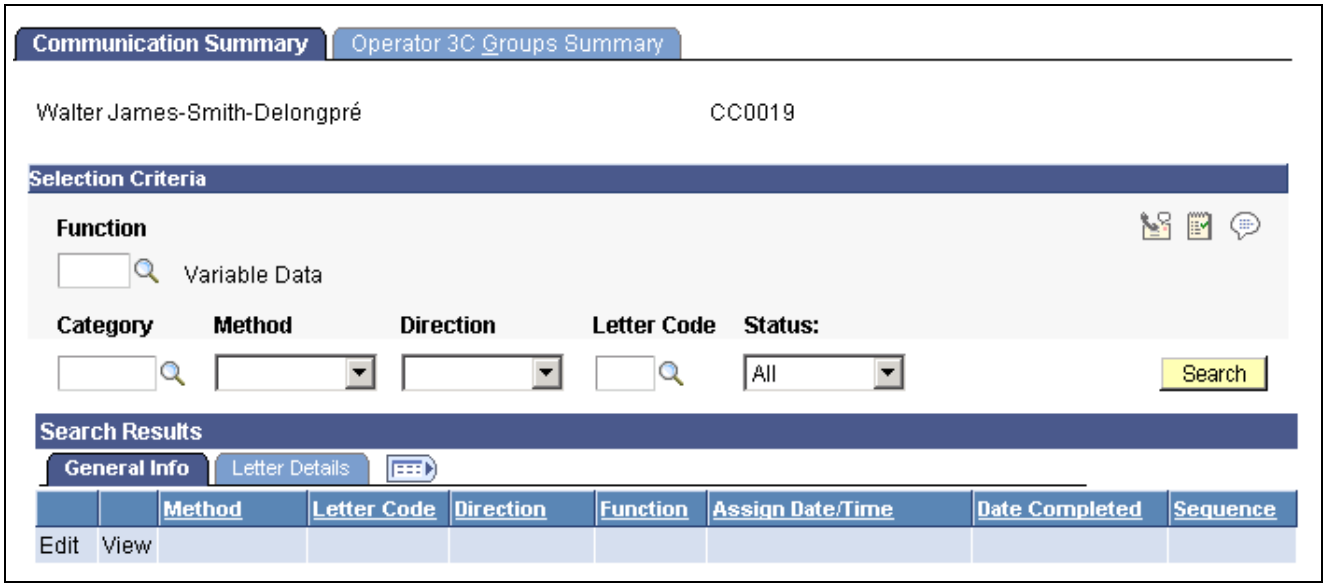
- Review a summary of communications with an individual.
- Review extract data for a communication with an individual.
- Review details of a communication with an individual.

Pages Used to Review Communications with Individuals

Page Name	Object Name	Navigation	Usage
Communication Summary	COMM_SUMMARY	Campus Community, Communications, Person Communications, Communication Summary	Search for and review a summary of communications to or from an individual.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary	View 3C group inquiry and update access to communications with individuals.
Communication Letter Data	COMM_LTR_DATA	Campus Community, Communications, Persona Communications, Communication Letter Data	Review extract data for a communication with an individual.
Communication Detail 1	COMM_MGMT1	Campus Community, Communications, Person Communications, Communication Detail, Communication Detail 1	View details of a communication assigned to an individual.
Communication Detail 2	COMM_MGMT2	Campus Community, Communications, Person Communications, Communication Detail, Communication Detail 2	View details of a communication assigned to an individual.

Reviewing a Summary of Communications with an Individual

Access the Communication Summary page.



Communication Summary page: General Info tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function Enter the administrative area on which to search.

Variable Data Click to access the Variable Data page, where you can add values to search on for specific variable data related to the administrative function that you selected.

If no variable data is required or allowed for the administrative function selected, the Variable Data link is unavailable.

Category Enter the category, from the Communication Categories page, for which to search.

Method Enter the method, from the Communication Contexts page, for which to search.

Direction Enter the direction, from the Communication Contexts page, for which to search.

Letter Code Enter the letter code, from the Standard Letters Table page, for which to search.

Status Enter the status of the communications for which to search.

All: The system searches for all communications regardless of status.

Complete: The system searches only for completed communications.

Incomplete: The system searches only for incomplete communications.

Search Click to launch the search based on the criteria you selected.

Letter Details Tab

Use the Letter Details tab to determine supplemental information about the communication—if there were enclosures, the enclosure letter codes and descriptions; if the communication was joint, the related ID; and the category and context for the communication.

Note. A joint communication can be assigned to only one of the two IDs. However, when a joint communication is assigned, the communication is listed in the summary for both IDs. For example, if you assign a joint communication to primary ID 12345 with the related ID 13578, and view the summary for ID 12345, the joint communication check box is selected and no related ID value appears. When you view the summary for (related) ID 13578, the joint communication check box is selected and the related ID of 12345 appears.

Reviewing Extract Data for an Individual Communication

Use the Communication Letter Data page to review the data extracted for an individual as the result of the letter generation data extract process.

See Also

Chapter 31, “Managing Communications,” Reviewing Extract Data Online for Individuals, page 459

Reviewing Details of a Communication with an Individual

You can review the details of a communication with an individual on the Communication Detail 1 and 2 pages. These pages are view-only versions of the Communication Management 1 and 2 pages, where you assign communications to the individual. You cannot enter or edit data on the detail pages.

See Also

Chapter 31, “Managing Communications,” Assigning Communications to Individuals, page 441

Reviewing 3C Group Access to Communications with Individuals

Access the Operator 3C Group Summary page.

Reviewing Communications with an Organization

This section discusses how to:

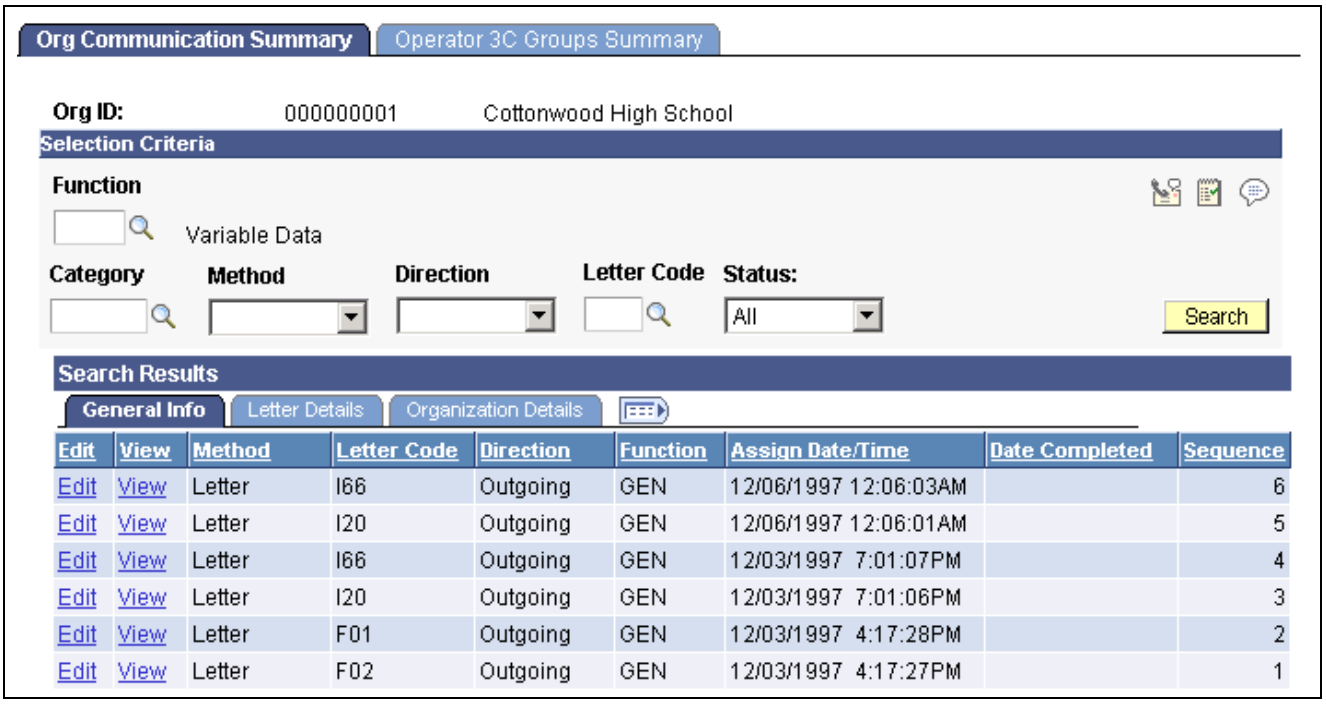
- Review a summary of communications with an organization.
- Review extract data for a communication with an organization.
- Review details of a communication with an organization.

Page Used to Review Communications with Organizations

Page Name	Object Name	Navigation	Usage
Org Communication Summary	ORG_COMM_SUMMARY	Campus Community, Communications, Organization Communications, Org Communication Summary	Review communications with an organization.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	Campus Community, Communications, Organization Communications, Communication Summary, Operator 3C Groups Summary	View 3C group inquiry and update access to communications with individuals.

Reviewing a Summary of Communications with an Organization

Access the Org Communication Summary page.



Org Communication Summary page: General Info tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function Enter the administrative area on which to search.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

Category Enter the category, from the Communication Categories page, for which to search.

Method Enter the method, from the Communication Contexts page, for which to search.

Direction Enter the direction, from the Communication Contexts page, for which to search.

Letter Code Enter the letter code, from the Standard Letters Table page, for which to search.

Status Enter the status of the communications for which you want to search.

All: The system searches for all communications regardless of status.

Complete: The system searches only for completed communications.

Incomplete: The system searches only for incomplete communications.

Search Click to launch the search based on the criteria you selected.

General Info Tab

Use the General Information tab to determine information about each primary communication—the method, letter code, direction, function, assign date/time, and date completed.

Letter Details Tab

Use the Letter Details tab to determine supplemental information about the communication—if there were enclosures and the enclosure letter codes and descriptions; and the category and context for the communication.

Organization Details Tab

Use the Organization Details tab to determine the recipient organization's department, location, and contact name.

Reviewing Extract Data for an Organization Communication

Use the Organization Communication Letter Data page to review the data extracted for an organization as the result of the letter generation data extract process.

Reviewing Details of an Organization Communication

You can review the details of a communication with an individual on the Communication Detail 1 and 2 pages. These pages are view-only versions of the Communication Management 1 and 2 pages, where you assign communications to the individual. You cannot enter or edit data on the detail pages.

See Also

Chapter 31, "Managing Communications," Assigning Communications to an Organization, page 447

Reviewing 3C Group Access to Communications with Organizations

Access the Operator 3C Group Summary page.

CHAPTER 32

Managing Comments

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

- Enter comments.
- Review comments.
- View comments reports.

Understanding Comments

You can enter and track comments about individuals and organizations. You can review all comments about an individual or organization or all comments entered by a specific individual. Because personal comments are subjective and often confidential, carefully analyze your institution's needs and requirements for entering and tracking comments. You should also be familiar with administrative functions and 3C group security before setting up or creating comments in your system.

(comments)

With the appropriate security access, you can click the Create Comments button while on a page in a functional area about that individual or organization to attach or review comments to an individual's or an organization's record.

You can also navigate through the menus to access the comments pages described in this chapter.

Prerequisites

Set up comments, including comment categories and 3C comment groups, before entering comments for individuals or organizations.

See Also

Chapter 15, "Setting Up Comments," page 143

Entering Comments

This section lists common elements and discusses how to:

- Enter comments about an individual.

- Enter comments about an organization.
- Review or change variable data.

Common Elements Used in This Section

Administrative Function The code for the administrative area with which this comment is associated.

3C Group The group of comment types to which a user has security access.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data (for the individual or organization) that is associated with the administrative function.

If you transfer to this page directly from a functional area, the variable data transfers from there. If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data transfers from the functional area.

(communications) Click to transfer to the Communication Management 1 page or the Organization Communication 1 page, where you can add a new communication for the individual or organization.

(checklists) Click to transfer to the Checklists Management 1 page or the Organization Checklist Management 1 page, where you can add a new checklist for the individual or organization.

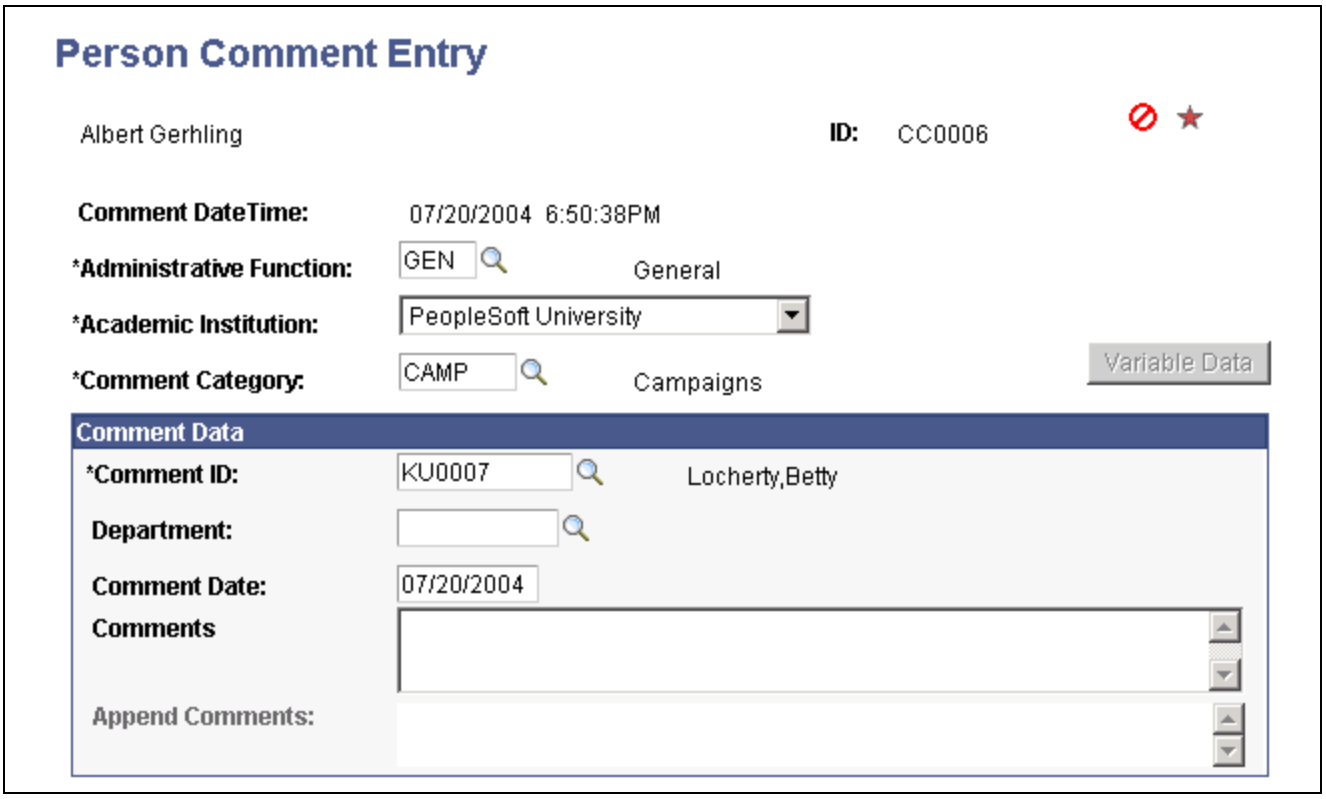
(comments) Click to transfer to the Personal Comment Entry page or the Organizational Comments page, where you can enter a new comment for the individual or organization.

Pages Used to Enter Comments

Page Name	Object Name	Navigation	Usage
Person Comment Entry	CMNT_ENTRY1	Campus Community, Comments, Comments - Person, Person Comment Entry	Enter comments about an individual.
Organization Comment Entry	ORG_CMNT_ENTRY1	Campus Community, Comments, Comments - Organization, Organization Comment Entry	Enter comments about an organization.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Person Comment Entry page or on the Organization Comment Entry page.	Review or change variable data for an individual or organization.

Entering Comments About an Individual

Access the Person Comment Entry page.



Person Comment Entry page

Administrative Function The code for the administrative area with which this comment is associated.

Academic Institution The academic institution with which this comment is associated.

Comment Category The business need with which this comment is associated.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

Comment Data

Comment ID The system displays the ID of the person entering the comment. If someone else is responsible for this comment, you can override the default ID and type the responsible person's ID.

Department The department responsible for the comment.

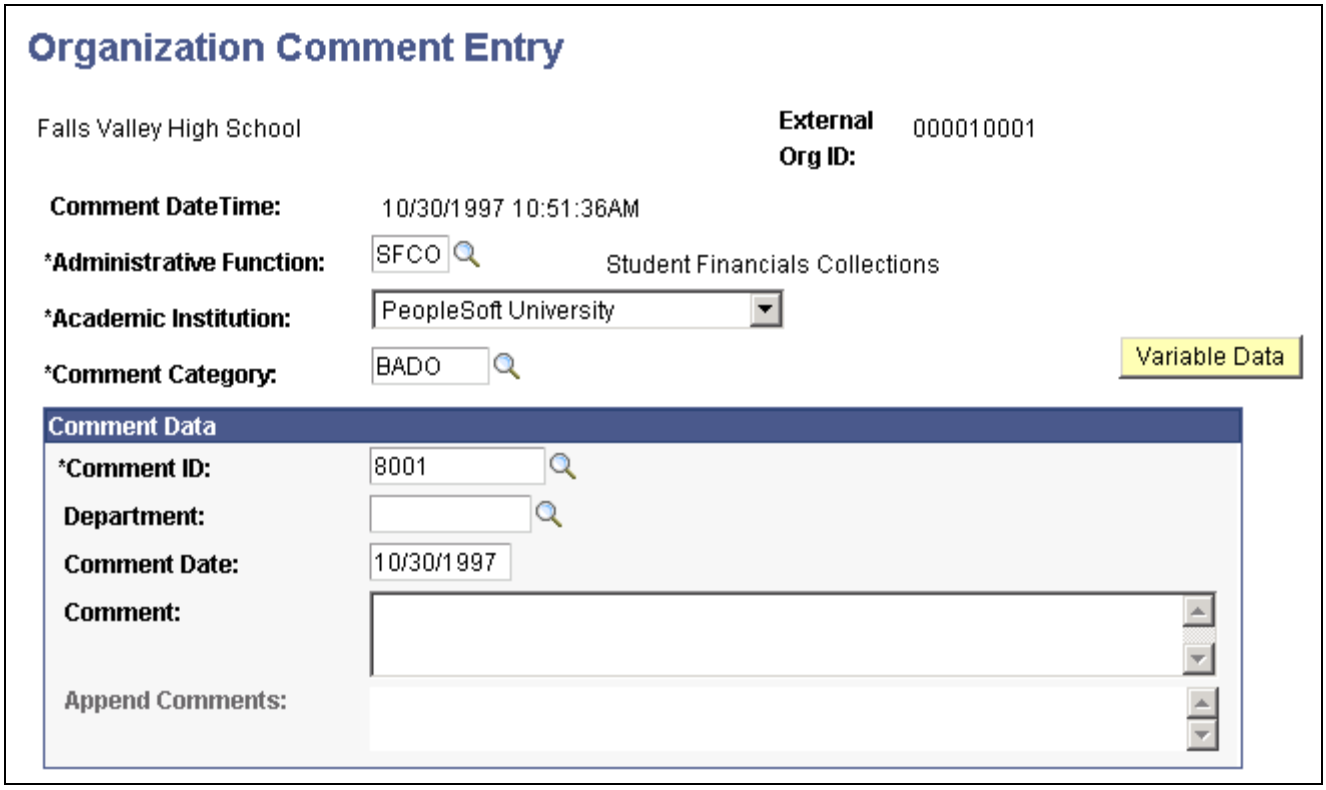
Comment Date The date when the comment is entered. The default date is the system's current date. You can override this date.

Comments The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes,* this field is editable.

Append Comments If the default comment is set to *Append,* this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments.

Entering Comments About an Organization

Access the Organization Comment Entry page.



Organization Comment Entry page

Administrative Function The administrative area with which this comment is most closely associated.

Academic Institution The academic institution with which this comment is most closely associated.

Comment Category The business need with which this comment is associated.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

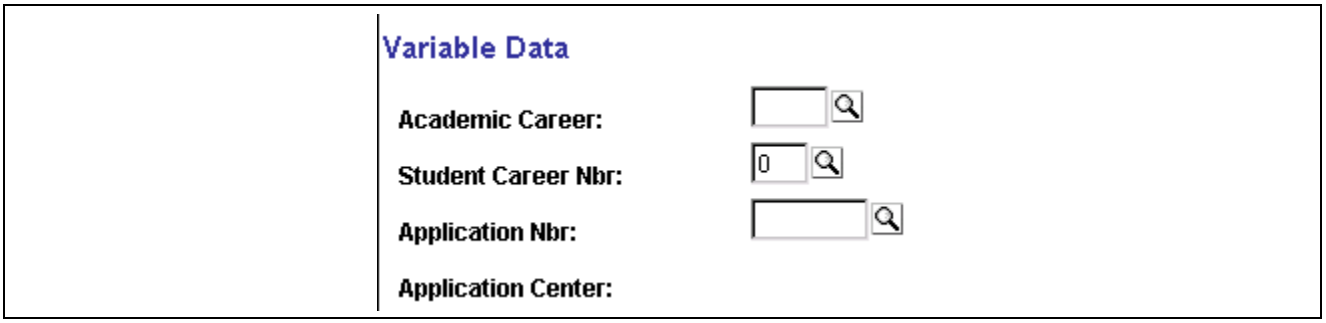
Comment Data

Comment ID The system displays the ID of the person entering the comment. If someone else is responsible for the comment, you can override the ID and enter the responsible person's ID.

Department	The department responsible for the comment.
Comment Date	The date when the comment is entered. The default date is the system's current date. You can override this date.
Comments	The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes,* this field is editable.
Append Comments	If the default comment is set to *Append,* this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments.

Reviewing or Changing Variable Data

Access the Variable Data page.



Variable Data page

Different fields and data appear on this page, based on the administrative function selected in the individual Person Comment Entry page or on the Organization Comment Entry page.

See Also

Chapter 13, "Setting Up Administrative Functions," page 123

Reviewing Comments

This section lists common elements and discusses how to:

- Review a summary of comments about an individual.
- Review a summary of comments about an organization.
- Determine who is responsible for a comment.
- Review 3C group access to comments.

Note. Users can access only those comments to which they have been granted 3C group security. With 3C group inquiry access, users can view the comments but cannot change them. With 3C group update access, users can view and change the comments.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Selecting the Type of 3C Group Access

Common Elements Used in This Section

Edit or **View**
Click to access the Personal Comment Entry page or Organizational Comments page where, depending on your 3C group security level for the category, you can view or edit the comment about the individual or organization.

Edit is available for 3C group *update* access.

View is available for 3C group *inquiry* access.

Category
The code for the category with which the comment is associated.

Description
The description of the category with which the comment is associated.

Function
The code for the administrative area with which the comment is associated.

DateTime
The date and time when the comment was entered.

Sequence
The number of the comment in the list of comments for the individual or organization.

Selection Criteria (area)
If you click Search without entering any values, the system searches for all comments for the person ID or the organization ID and displays the results at the bottom of the page. Enter values or any combination of values *(Function, Category,* or *Comment ID)* to limit the search.

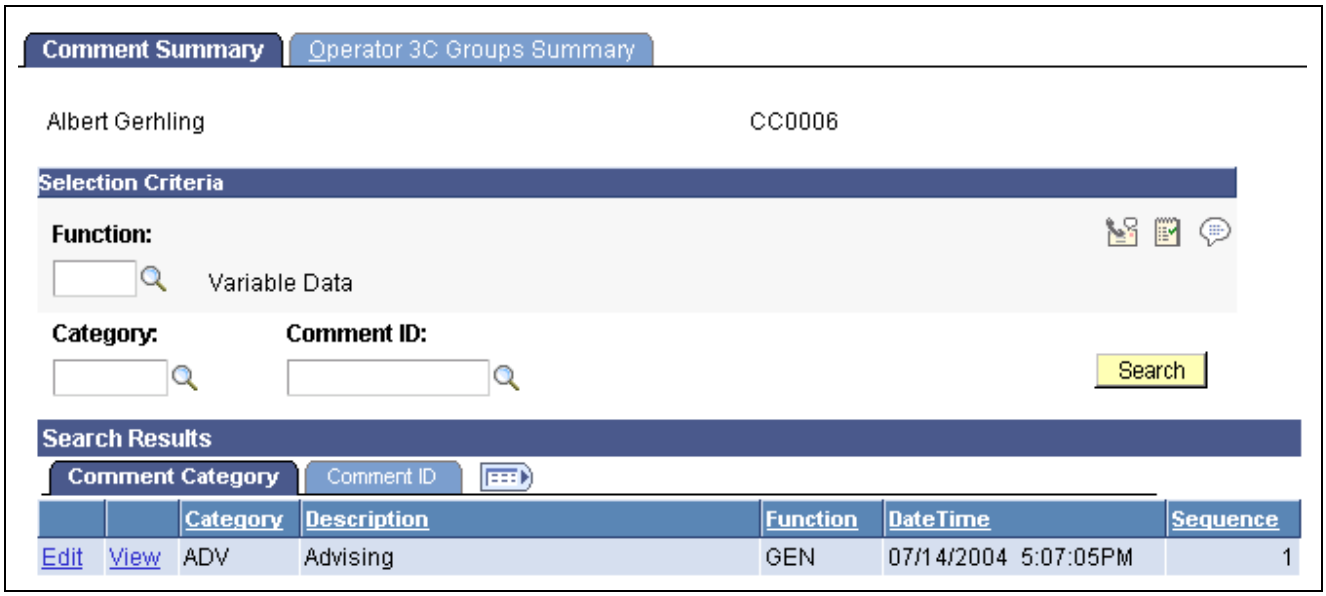
Comment ID (tab)
Click to determine the ID and name of the person who is responsible for the comments.

Pages Used to View Comments

Page Name	Object Name	Navigation	Usage
Comment Summary	CMNT_SUMMARY	Campus Community, Comments, Comments - Person, Person Comment Summary	View a summary of comments about an individual.
Organization Comment Summary	ORG_CMNT_SUMMARY	Campus Community, Comments, Comments - Organization, Organization Comment Summary	View a summary of comments about an organization.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	• Campus Community, Comments, Comments - Person, Person Comment Summary, Operator 3C Groups Summary • Campus Community, Comments, Comments - Organization, Organization Comment Summary, Operator 3C Groups Summary	View or change an individual's 3C group inquiry or update access.
Person Comment Detail	CMNT_ENTRY1	Campus Community, Comments, Comments - Person, Person Comment Detail	View the details of a comment about an individual. (This is a view-only version of the Personal Comment Entry page.)
Organization Comment Detail	ORG_CMNT_ENTRY1	Campus Community, Comments, Comments - Organization, Organization Comment Detail	View the details of a comment about an organization. (This is a view-only version of the Organization Comment Entry page.)

Reviewing a Summary of Comments About an Individual

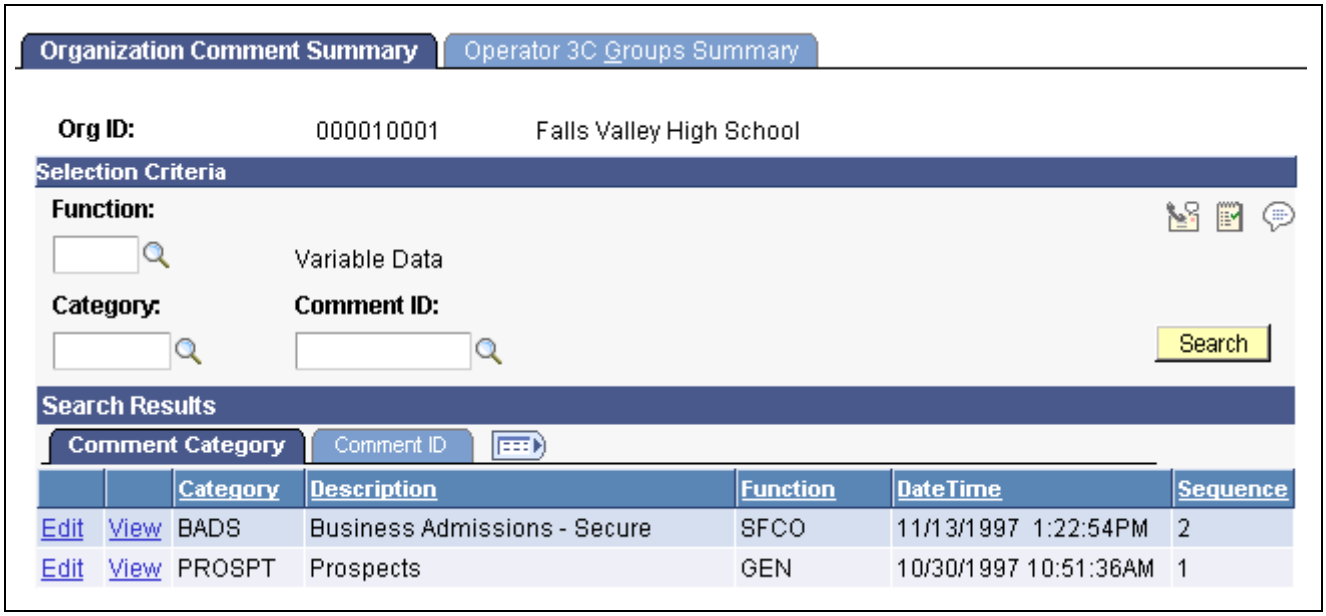
Access the Comment Summary page.



Comment Summary page: Comment Category tab

Reviewing a Summary of Comments About an Organization

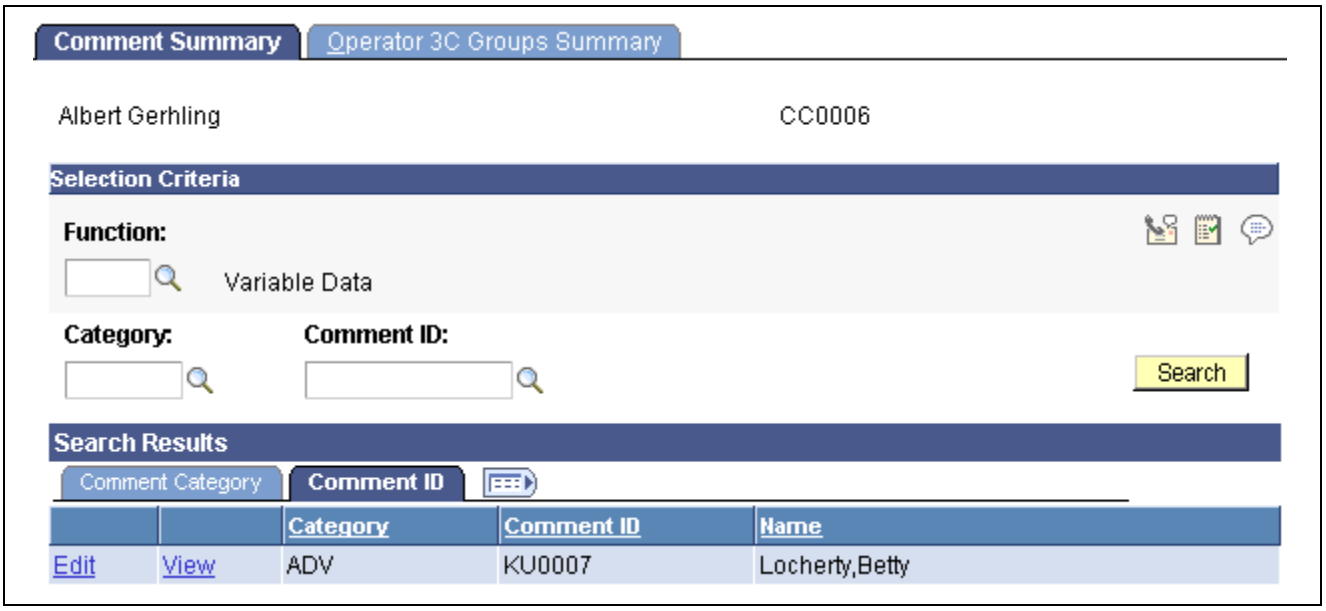
Access the Organization Comment Summary page.



Organization Comment Summary page: Comment Category tab

Determining Who Is Responsible for a Comment

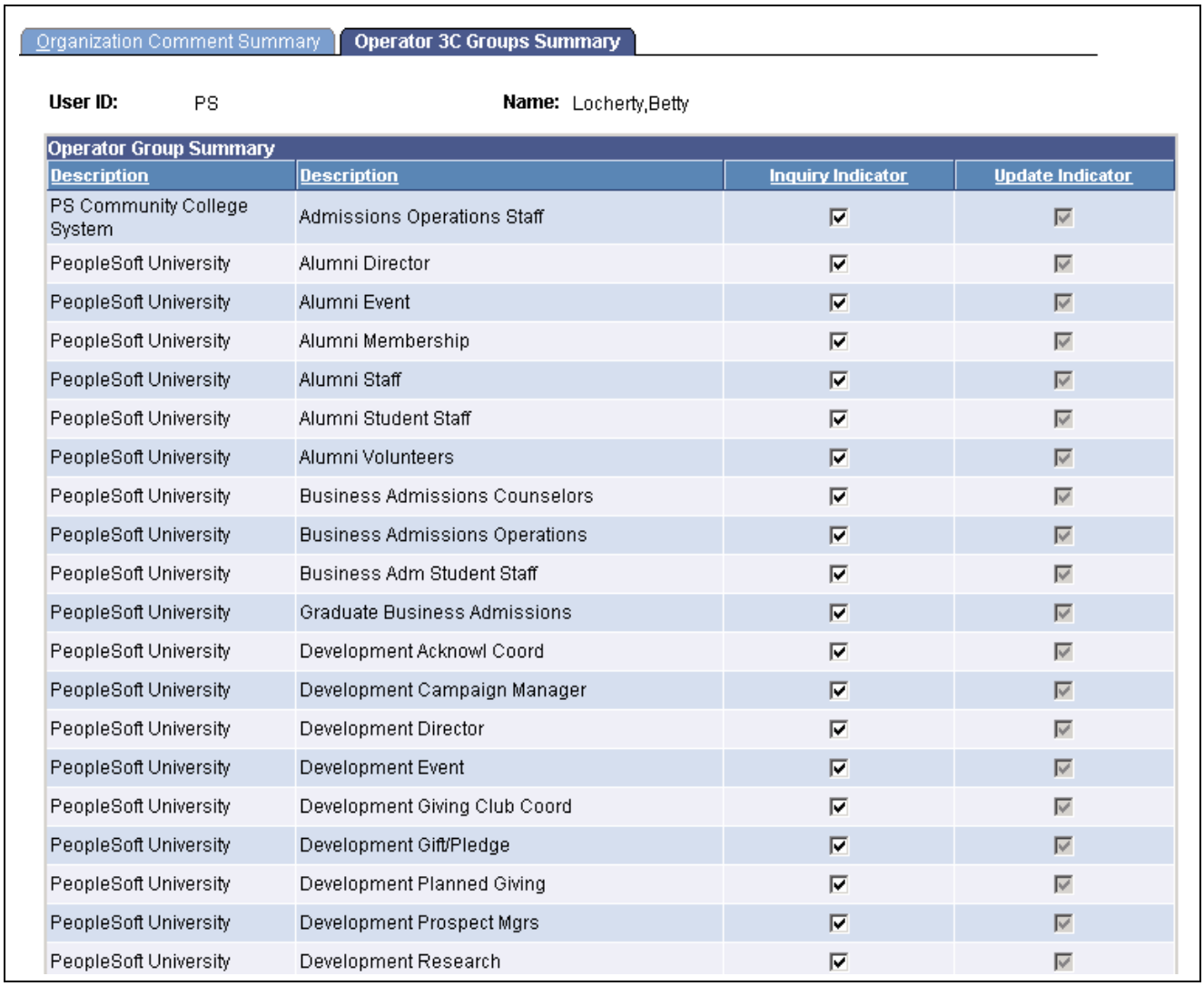
Access the Comment ID tab area on the appropriate summary page (Comment Summary page or Organization Comment Summary page).



Comment Summary page: Comment ID tab

Reviewing 3C Group Access to Comments

Access the Operator 3C Groups Summary page.



Operator 3C Groups Summary page

CHAPTER 33

Managing Checklists

This chapter provides an overview of checklists, lists prerequisites and common elements, and discusses how to:

- Assign checklists to individuals.
- Assign checklists to organizations.
- Assign checklists to events.
- View or change checklist 3C group access.
- Update checklists manually by ID.
- Update checklists manually by item.
- Update checklists automatically by item.
- Update checklists automatically by area.
- Review checklists for individuals.
- Review checklists for organizations.
- Review checklists for events.

Understanding Checklists

Use checklists to assign lists of requirements to individuals, organizations, events, or groups of individuals and to monitor progress toward completing those requirements. You can use checklists to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and so on.

You can assign checklists to an organization. For example, you might want to assign a checklist of recruitment items required from a specific high school, including a roster of the top 10 percent of the current graduating class, a list of athletic award winners, and scholarship applicants.

You can assign checklists to events. For example, if you are presenting a conference, you might want to create a checklist of things to do, including sending out invitations, booking a keynote speaker, setting food menus, and so on.

For each checklist item that you assign, you can specify the individual who is responsible for that item and the due date. If the item is also associated with an organization, you can specify the name of the organization responsible for the item. You can also specify an ultimate due date for the overall checklist.

You can assign checklists to individuals, organizations, and events manually, or you can use the 3C engine to automatically assign checklists to individuals or organizations based on rules and conditions that you define.

See Chapter 30, "Using the 3C Engine," page 409.

(checklists) After a checklist is set up, you can, with appropriate security access, click the Create Checklists button on a page in a functional area about that individual or organization to view or update their checklists.

You can also navigate through the menus, as described in this section, to access the checklist management pages.

You can update the status of checklist items manually on the same checklist management pages where you assign the items, or you can view a summary of all checklist items assigned to an individual, organization, or event and manually update each checklist item status there.

You can update a specific checklist item for the IDs that you indicate. For example, when a recruiter makes phone calls to several prospects, he or she could select the Recruiter Phone Call checklist item to update and enter the ID of each individual who was called. When the page is saved, the system updates the status of the Recruiter Phone Call checklist item for each of the specified individuals.

You can use automated processes to update checklists, too. You can specify criteria to run either the Update - Automated process or the Update Checklists - by Item process to update checklists in the background.

Run the Item Update - Automated is a background process that updates the status of either a specific checklist item or all checklist items in three general areas (transcripts, general materials, and test scores) across the IDs that you specify. The process updates the checklists in the background and, once set up, does not require manual intervention. It automatically checks the status indicator for all items in each area that you select and, upon encountering a status of *Complete* for an item, updates the status of the relevant checklist.

You can use the 3C engine to automatically update checklist items either in the background or in real time, based on rules and events that you define.

Note. The 3C engine cannot update items that include organization and name IDs. You must update checklists for transcripts, test scores, and general material items either manually or by using the Item Update - Automated process.

You can review checklist information several ways. You can review checklist information for an individual, organization, or event; or you can review checklist information by tracking group for an individual or for an organization. You can review detailed checklist data for an organization, or you can search for a summary of the checklist data that you want to review for an organization. You can also review organization checklists by the tracking groups to which their checklist items are assigned.

Note. PeopleSoft Enterprise Campus Self Service, which is licensed separately, offers self-service checklist functionality.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, “Using Self-Service Campus Personal Information,” Using Self-Service Checklists Data.

See Also

Chapter 29, “Understanding the 3Cs—Communications, Checklists, and Comments,” page 407

Chapter 30, “Using the 3C Engine,” page 409

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Using Mass Change”

Prerequisites

Before you can assign and monitor checklists, you must set up checklist item codes and checklist templates. To use the full functionality of checklist management, you should also be familiar with administrative functions and 3C group security, and ensure that they are properly set up.

See Also

Chapter 16, "Setting Up Checklists," page 149

Chapter 13, "Setting Up Administrative Functions," page 123

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

Common Elements Used in This Chapter

(communications)	Click to transfer to where you can add a new communication for the individual or organization.
(checklists)	Click to transfer to where you can add a new checklist for the individual or organization.
(comments)	Click to transfer to where you can enter a new comment for the individual or organization.
View or **Edit**	Click to transfer to where you can view or edit the communication assignment.

Note. The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Assigning Checklists to Individuals

This section discusses how to:

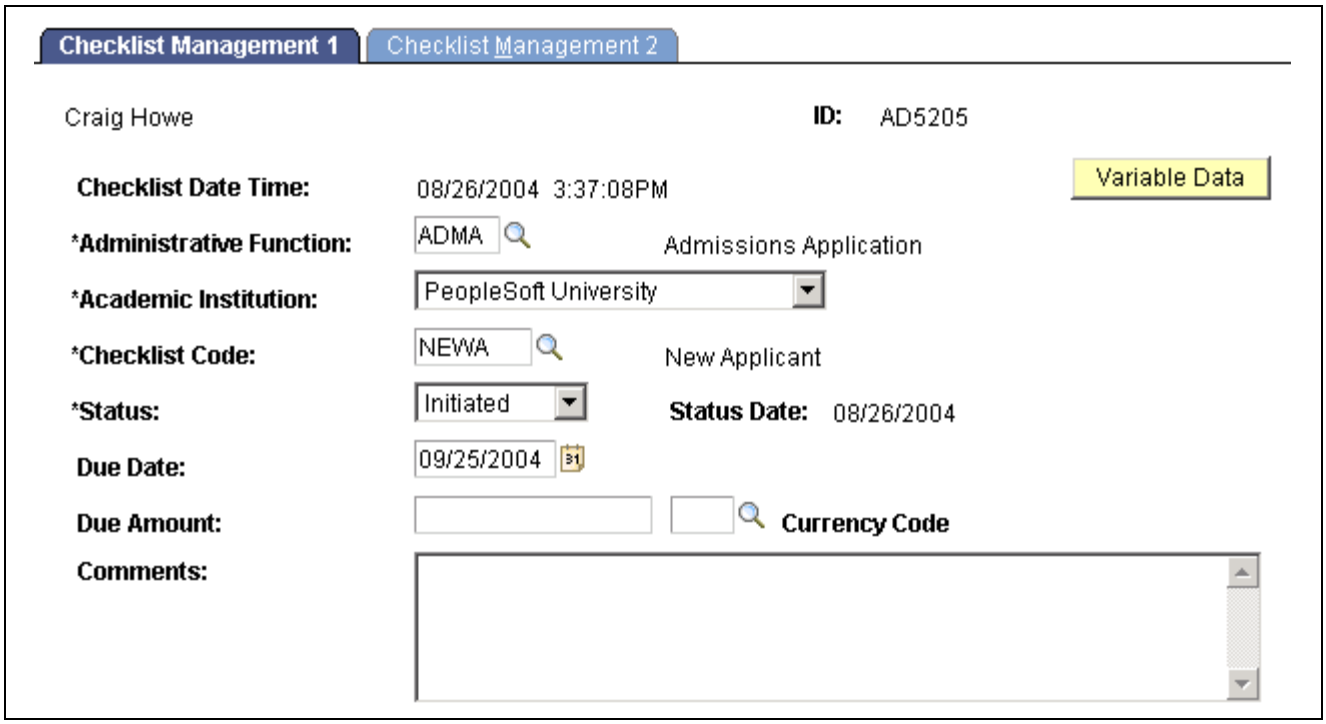
- Assign a checklist to an individual.
- Review or update variable data for an individual.
- Assign checklist items to an individual's checklist.

Pages Used to Assign Checklists to Individuals

Page Name	Object Name	Navigation	Usage
Checklist Management 1	PERS_CHKLST_MGMT1	Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 1	Assign a checklist to an individual.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Checklist Management 1 page.	Review or edit variable data for an individual.
Checklist Management 2	PERS_CHKLST_MGMT2	Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 2	Place checklist items on an individual's checklist and identify who is responsible for each item.

Assigning a Checklist to an Individual

Access the Checklist Management 1 page.



Checklist Management 1 page

Administrative Function The code for the functional area with which this individual is associated.

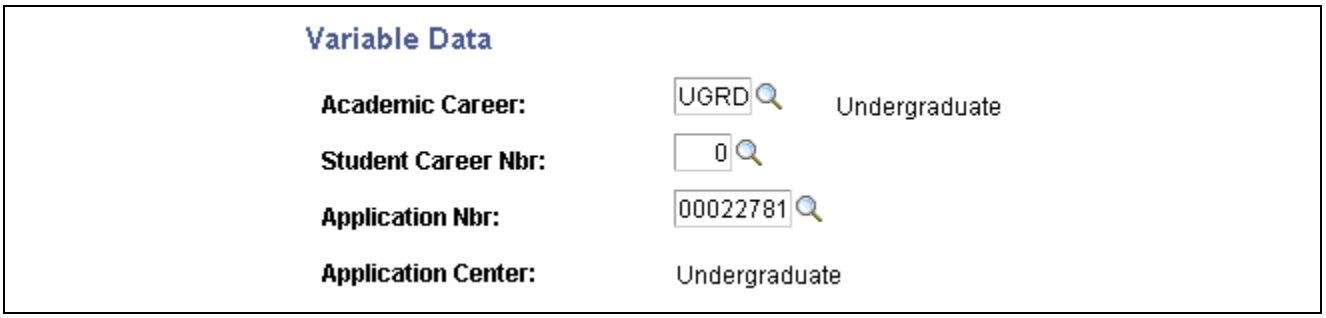
The available administrative function codes are from the Administrative Functions page.

If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code	The code that describes the checklist assigned to this individual. The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.
Status and **Stat Dt** (status date)	The system displays the status and the date when the status was updated. Valid status values are *Initiated* or *Completed.*
Due Date	The date by which the entire checklist must be completed for this individual.
Due Amount	The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.
Comments	Enter comments to further identify or describe the checklist for this individual.
Variable Data	If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer. If variable data is required, the Variable Data button is available. Select the variable data (for example, Aid Year) for which the checklist is applicable.

Reviewing or Updating Variable Data for an Individual

Access the Variable Data page.



Variable Data page (individual)

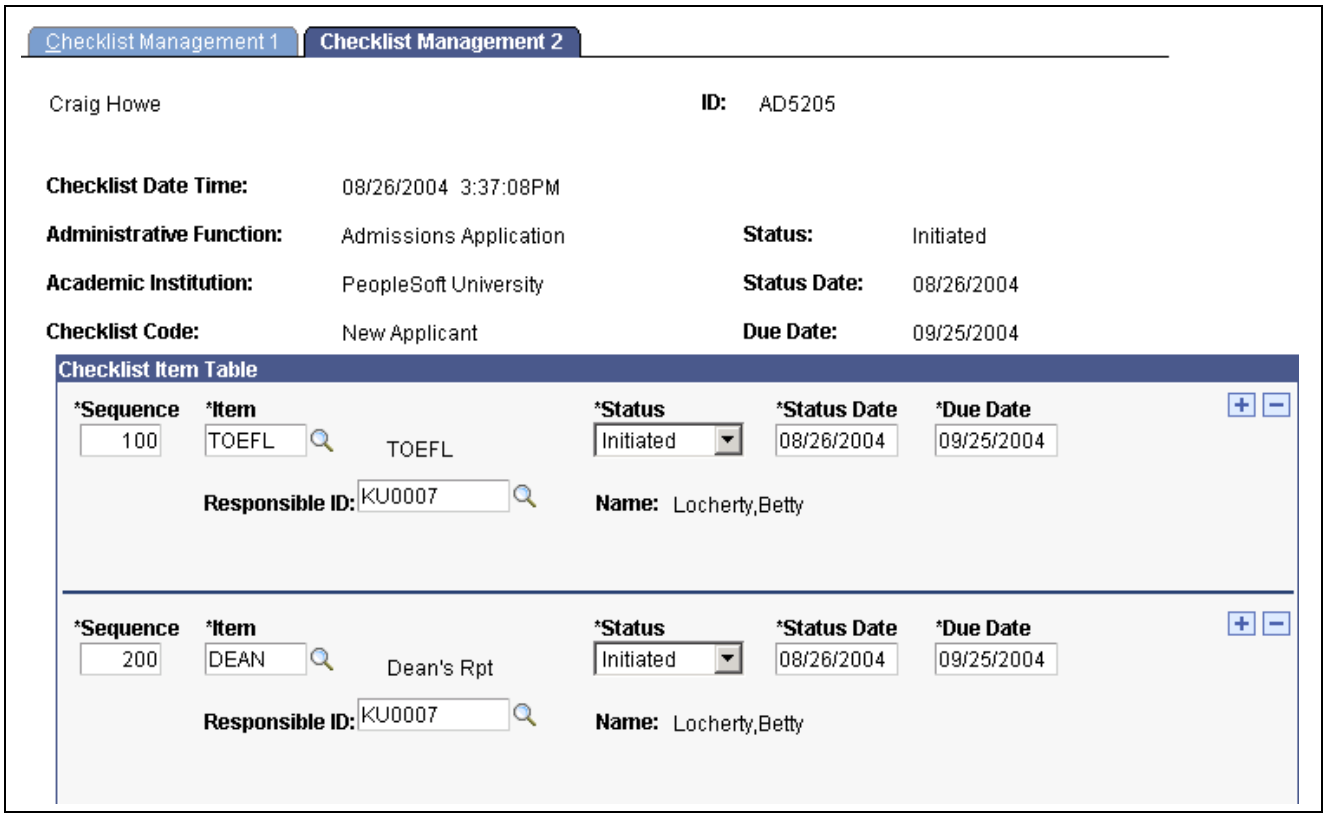
Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.

See Also

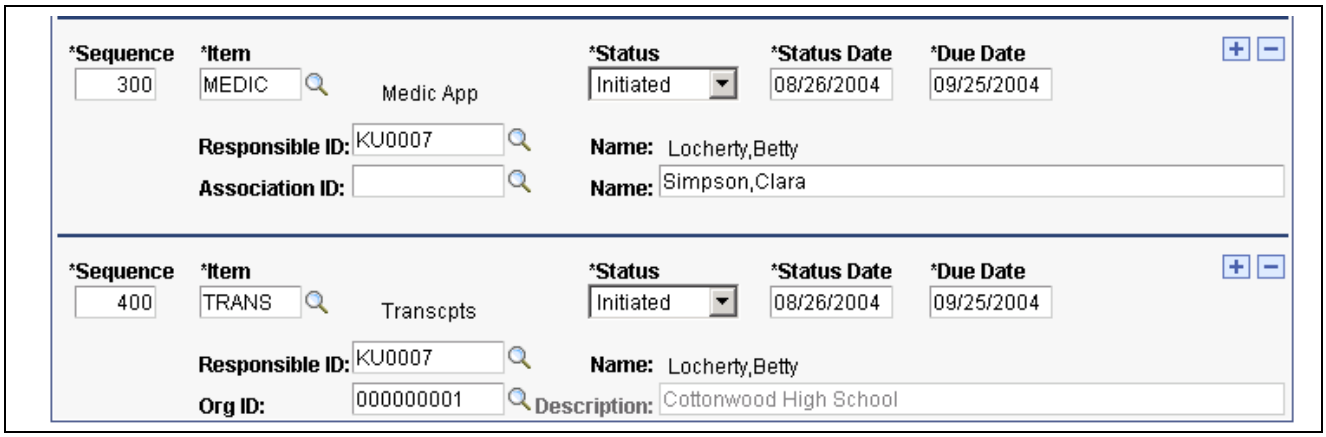
PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Campus Community," Setting Up 3C Group Security

Assigning Checklist Items to an Individual's Checklist

Access the Checklist Management 2 page.



Checklist Management 2 page (1 of 2)



Checklist Management 2 page (2 of 2)

Note. The checklist items associated with the specified checklist code on the Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Checklist Items

Sequence The number of this checklist item in the list of checklist items for this individual.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item The code for this checklist item. The available item codes are from the Checklist Item Functions page for the administrative function selected.

Status and **Status Date** The status and status date of the checklist item: *Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived,* or *Cancelled.*

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

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Responsible ID and **Name** The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database. The system displays the name of the individual with that ID.

Association ID and **Name** If the checklist item was created with an item association of *Name* on the Checklist Items page, the Association ID field appears for you to identify the associated person. For example, the checklist item might be a medical appointment, and that appointment might be with Dr. Clara Simpson. Dr. Simpson is the associated person.

If the associated person has an ID in your database, enter it here. When you exit the field, the system displays the name of that individual.

If the individual does not have an ID in your database, enter his or her name manually.

Org ID (organization ID) and **Description** If the checklist item was created with an item association of *Organization* on the Checklist Items page, the Org ID field appears for you to identify the associated organization. For example, the checklist item might be a transcript, and a transcript is required from Cottonwood High School. Cottonwood High is the associated organization.

If the associated organization has an ID in your database, enter it here. When you exit the field, the system displays the name of that organization.

If the organization does not have an ID in your database, enter the name manually.

Assigning Checklists to Organizations

This section discusses how to:

- Assign a checklist to an organization.
- Review or update variable data for an organization.

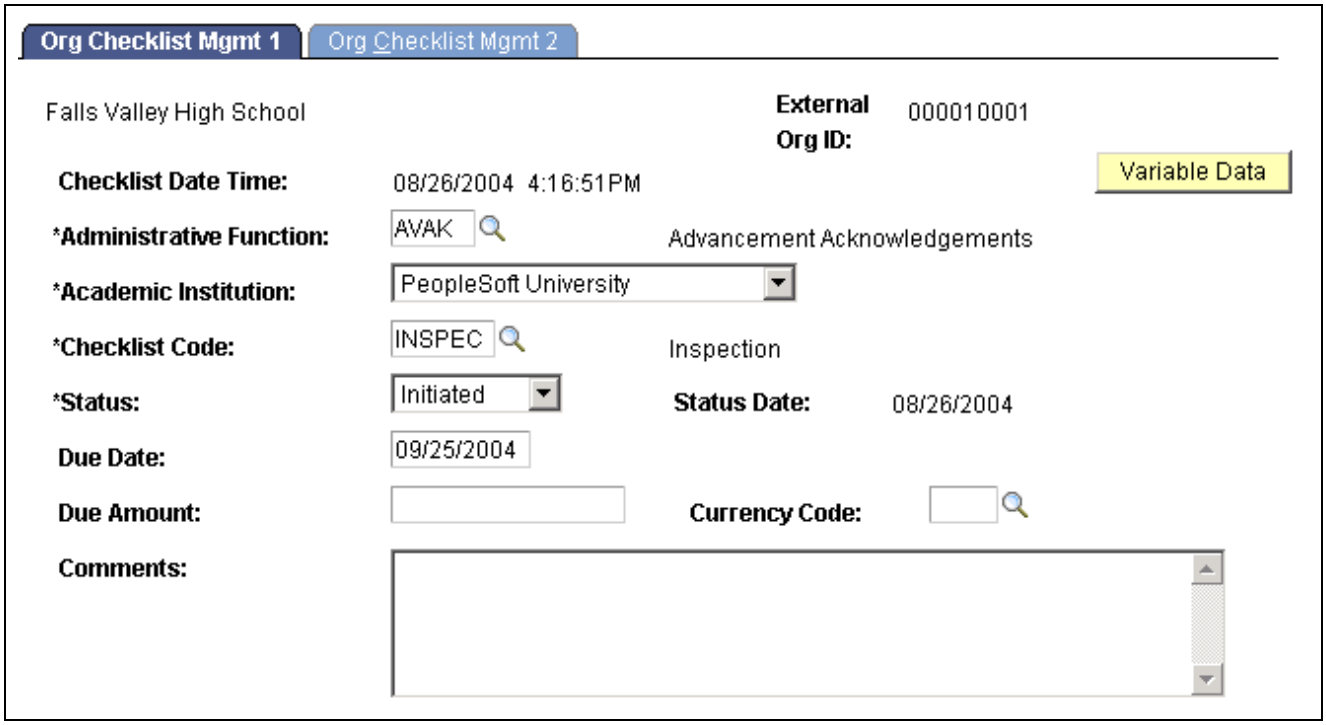
- Assign checklist items to an organization's checklist.

Pages Used to Assign Checklists to Organizations

Page Name	Object Name	Navigation	Usage
Org Checklist Mgmt 1	ORG_CHKLST_MGMT1	Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 1	Assign a checklist to an organization.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Organization Checklist Management 1 page.	Enter or review variable data for an organization.
Org Checklist Mgmt 2	ORG_CHKLST_MGMT2	Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 2	Place checklist items on an organization's checklist and identify who is responsible for each item.

Assigning a Checklist to an Organization

Access the Org Checklist Mgmt 1 page.



Org Checklist Mgmt 1 (organization checklist management) page

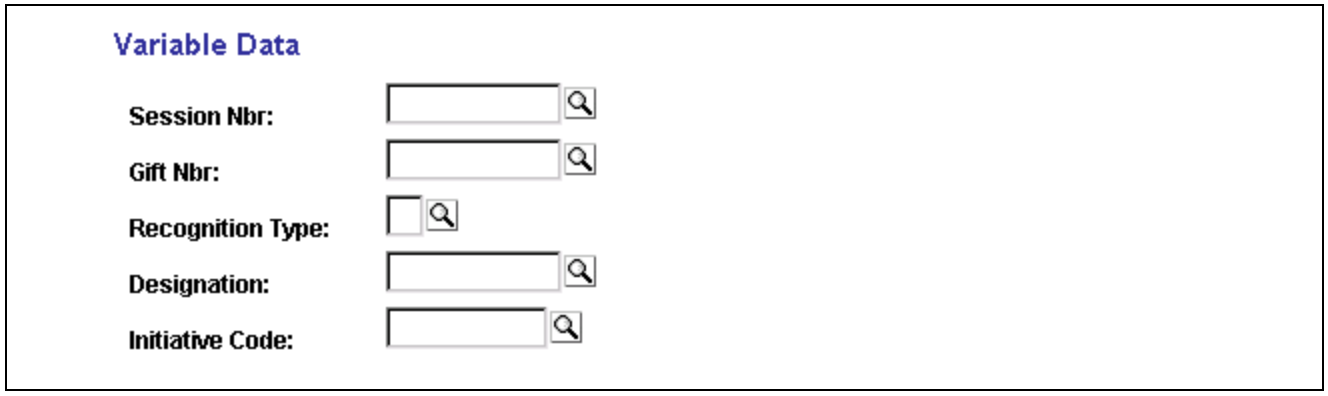
Administrative Function The code for the functional area with which this organization is associated.

The available administrative function codes are from the Administrative Functions page.

	If you accessed this page from another page, the system automatically displays the administrative function from that page.
Checklist Code	The code that describes the checklist assigned to this organization. The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.
Status and**Status Date**	The status and status date of the checklist item. Valid status values are *Initiated* or *Completed.* Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Due Date	The date by which the entire checklist must be completed for this organization.
Due Amount and **Currency Code**	The monetary amount, if any, that is due as part of this checklist, and the currency in which it is expressed.
Comments	Enter comments to further identify or describe the checklist for this organization.
Variable Data	If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

Reviewing or Updating Variable Data for an Organization

Access the Variable Data page.



Variable Data page (organization)

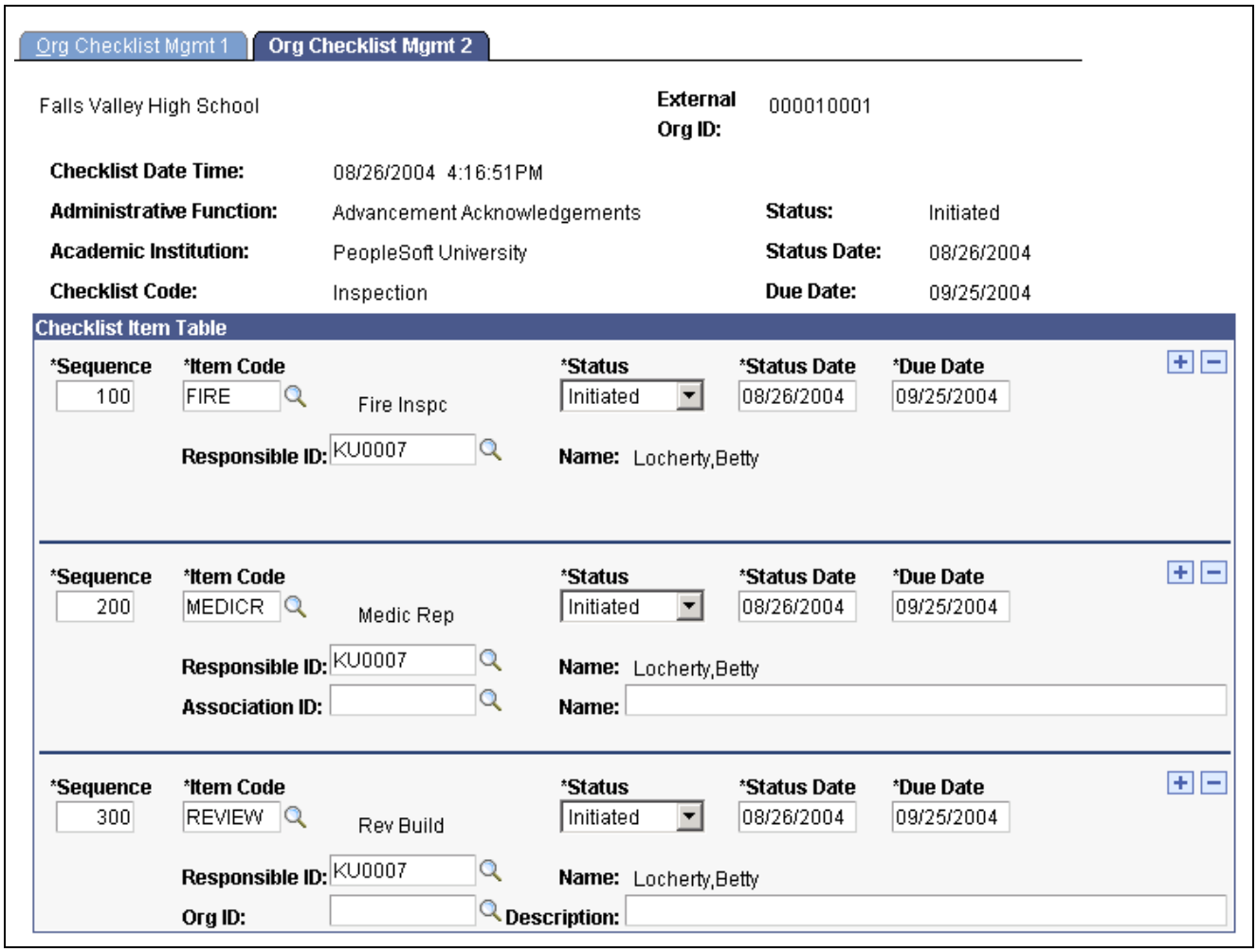
Different fields and data appear on this page, based on the individual and the administrative function selected on the Organization Checklist Management 1 page.

See Also

Chapter 13, “Setting Up Administrative Functions,” page 123

Assigning a Checklist Item to an Organization’s Checklist

Access the Org Checklist Mgmt 2 page.



Org Checklist Mgmt 2 (organization checklist management) page

Note. The checklist items associated with the specified checklist code on the Org Checklist Mgmt 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Checklist Items

Sequence The number of this checklist item in the list of checklist items for this organization.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item Code The code for this checklist item. The available item codes are from the Checklist Item Functions page for the administrative function selected.

Status and **Status Date** The status and status date of the checklist item: *Initiated, In Progress,* or *Completed.*

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

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Responsible ID The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.

Association ID and **Name** If the checklist item was created with an item association of *Name* on the Checklist Items page, the Association ID field appears for you to identify the associated person. For example, the checklist item might be a medical appointment, and that appointment might be with Dr. Clara Simpson. Dr. Simpson is the associated person.

If the associated person has an ID in your database, enter it here. When you exit the field, the system displays the name of that individual.

If the individual does not have an ID in your database, enter his or her name manually.

Org ID (organization ID) and **Description** If the checklist item was created with an item association of *Organization* on the Checklist Items page, the Org ID field appears for you to identify the associated organization. For example, the checklist item might be a transcript, and a transcript is required from Cottonwood High School. Cottonwood High is the associated organization.

If the associated organization has an ID in your database, enter it here. When you exit the field, the system displays the name of that organization.

If the organization does not have an ID in your database, enter the name manually.

Assigning Checklists to Events

This section discusses how to:

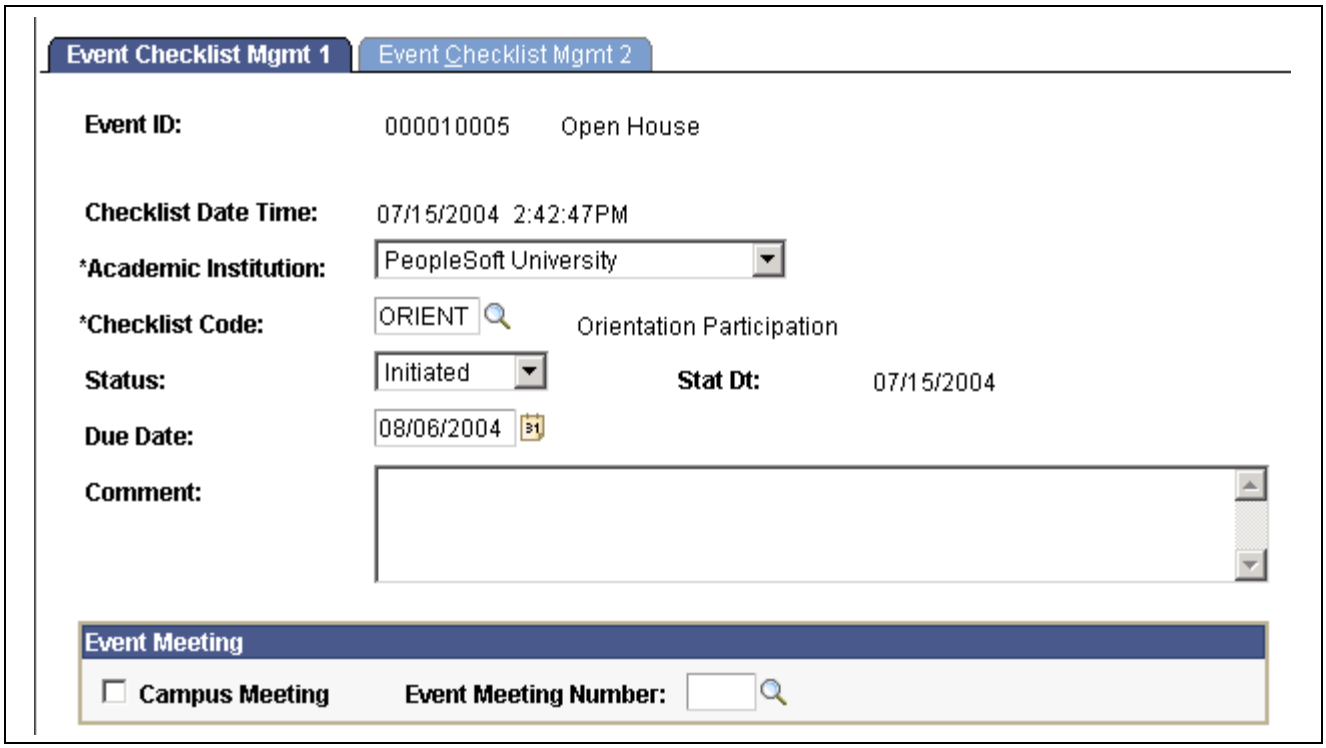
- Assign checklist items to an event's checklist.
- Assign a checklist to an event.

Pages Used to Assign Checklists to Events

Page Name	Object Name	Navigation	Usage
Event Checklist Mgmt 1	EVENT_CHKLST_MGMT1	Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 1	Specify checklist items for an event by selecting the meetings that make up the event.
Event Checklist Mgmt 2	EVENT_CHKLST_MGMT2	Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 2	Assign a checklist to an event.

Assigning a Checklist Item to an Event's Checklist

Access the Event Checklist Mgmt 1 page.



Event Checklist Mgmt (management) 1 page

Academic Institution The academic institution with which this event is associated.

The available academic institutions are from the Institution Table page.

Checklist Code The code that describes the checklist assigned to this organization.

The only checklist codes available are those associated with the EVNT (Event) administrative function on the Checklist Item Functions page.

Status and **Status Date** The status and status date of the checklist item: *Initiated,* or *Completed.*

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

Due Date The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Comment Enter comments to further identify or describe the checklist for this organization.

Event Meeting

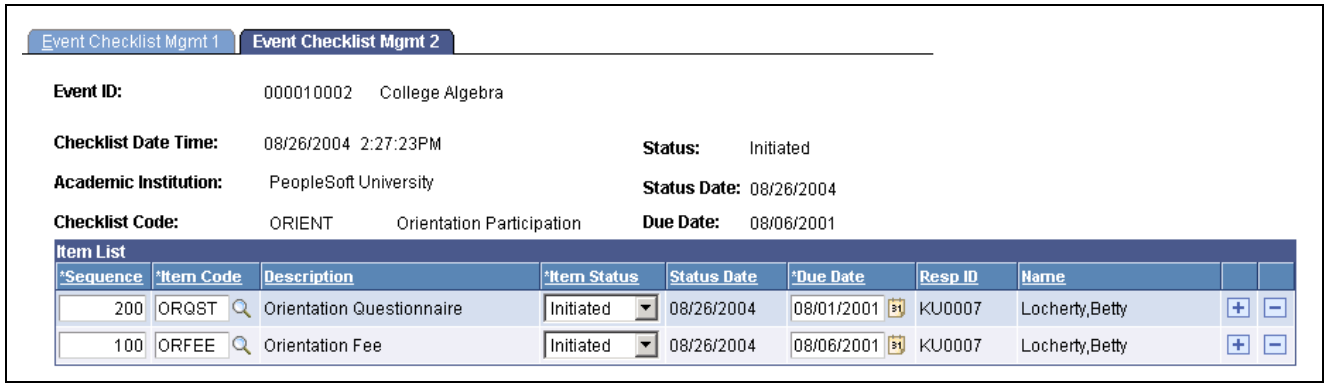
Enter event variable data in this section. This data is similar to variable data for individuals and organizations; however, the EVNT (Event) administrative function is the only applicable function for events.

Campus Meeting When selected, indicates that this checklist is for a specific meeting assigned to this event.

Event Meeting Number The number of the specific meeting to which this checklist is assigned. The available numbers are from the Meetings Details page for this event.

Assigning a Checklist to an Event

Access the Event Checklist Mgmt 2 page.



Event Checklist Mgmt (management) 2 page

Note. The checklist items associated with the specified checklist code on the Event Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Item List

Sequence The number of this checklist item in the list of checklist items for this organization.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item Code	The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.
Item Status and **Status Date**	The status and status date of the checklist item: *2nd Ntfctn, Active, Cancelled, Completed, Initiated, Notified, Ordered, Paid Off, Received, Returned,* or *Waived.* Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Due Date	The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.
Resp ID (responsible ID) and **Name**	The system displays the ID and name of the user who created the checklist on the Checklists page.

Reviewing 3C Group Access to Checklists

You can access the 3C Group Summary page to view or change an individual's 3C group security access to checklists.

Note. Users can access only those checklists to which they are granted 3C group security. With 3C group inquiry access, users can view the checklists, but cannot change them. With 3C group update access, users can view and change the checklists.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Setting User Defaults," Selecting the Type of 3C Group Access.

Updating Checklist Item Status

You can change the status of a checklist item for an individual or organization in the respective Checklist Management component.

To minimize security access concerns or to accelerate data entry, you can update the status of a checklist item for individual IDs (not for organization IDs) manually inside a component that shows only checklist items, or you can change the same item across all IDs automatically using the Update Checklist Item - by Item (CCCHKLER.SQR) process.

To update a checklist item manually by ID, access the checklist assigned to that ID and change the status of each item to the appropriate status in that checklist.

To use the Update Checklist Item - by Item process, select the item whose status you want to change and add all the IDs for which you want the process to update the status. For example, if you have several recruiter phone calls to make, as you call you could insert all the individual IDs under the checklist item Call Prospect". When you run the process, the system updates the checklist item status to *Complete* for all the IDs that you listed.

Using the automated process (CCITMUPD SQR), you can also update checklist items automatically across checklists using test scores, transcripts, or general materials.

This section discusses how to:

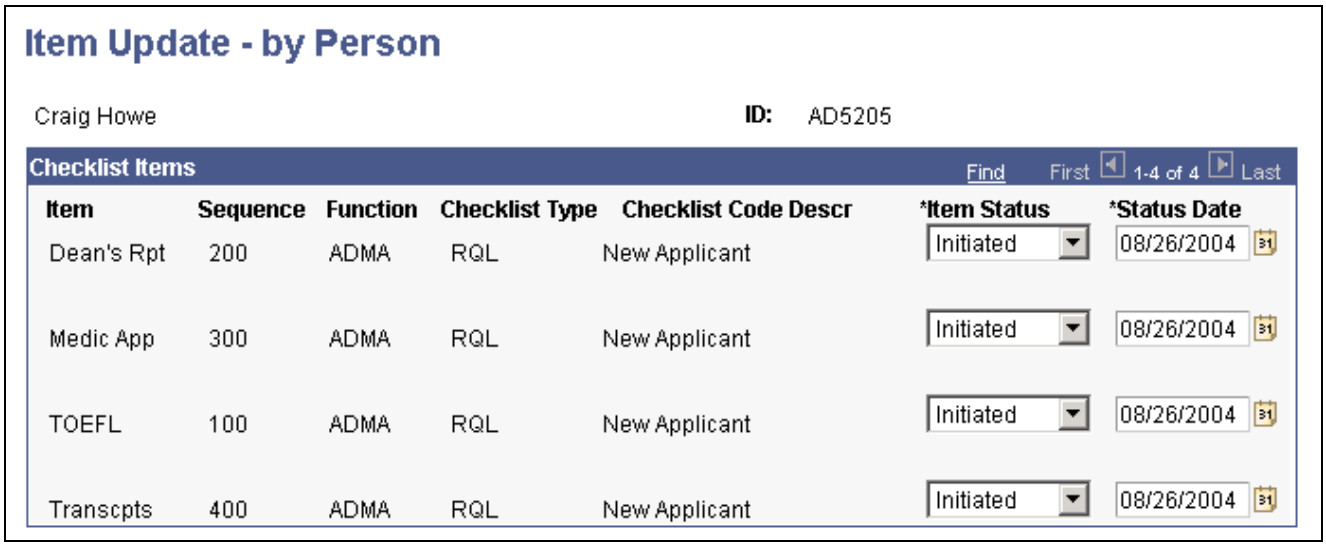
- Manually update checklist items by ID.
- Update all or a specific checklist item by automated process.
- Update test scores, transcripts, and general materials.

Pages Used to Update Checklist Item Status

Page Name	Object Name	Navigation	Usage
Item Update - by Person	PERS_CHKLST_UPDATE	Campus Community, Checklists, Person Checklists, Item Update - by Person	Manually update the status of each relevant checklist item on a summary of checklist items for a specific ID (individual IDs only).
Item Update - by Item	CHKLST_ITEM_UPDATE	Campus Community, Checklists, Process Checklists, Item Update - by Item	List all the individual IDs for whom you want to change the status of a specific checklist item to *Complete* when the update process (CCCHKLER SQR) runs in the background.
Update Checklist Item - by Item	RUNCTL_CCCHKLER	Campus Community, Checklists, Process Checklists, Update Checklist Item Update - by Item	Run the automated Update Checklist Item - by Item process (CCCHKLER SQR) to update one or all checklist items for IDs to which the items are assigned.
Checklist Item Update Parms	RUNCTL_ITMUPD	Campus Community, Checklists, Process Checklists, Item Update - Automated, Checklist Item Update Parms	Specify the test scores, transcripts, or general materials checklist items and IDs to update when running the Checklist Item Update process for test scores, transcripts, or general materials.
Data Selection Parms	RUNCTL_ITMUPD_DATA	Campus Community, Checklists, Process Checklists, Item Update - Automated, Data Selection Parms	Specify the IDs and materials to update when running the Checklist Item Update process for test scores, transcripts, or general materials.

Manually Updating Checklist Items by ID

Access the Item Update - by Person page.



Item Update - by Person page

Item, Sequence, Function, Checklist Type and **Checklist Code Descr** (checklist code description)
The system displays this information for each of the checklists items assigned to the individual on the Checklist Management 1 page.

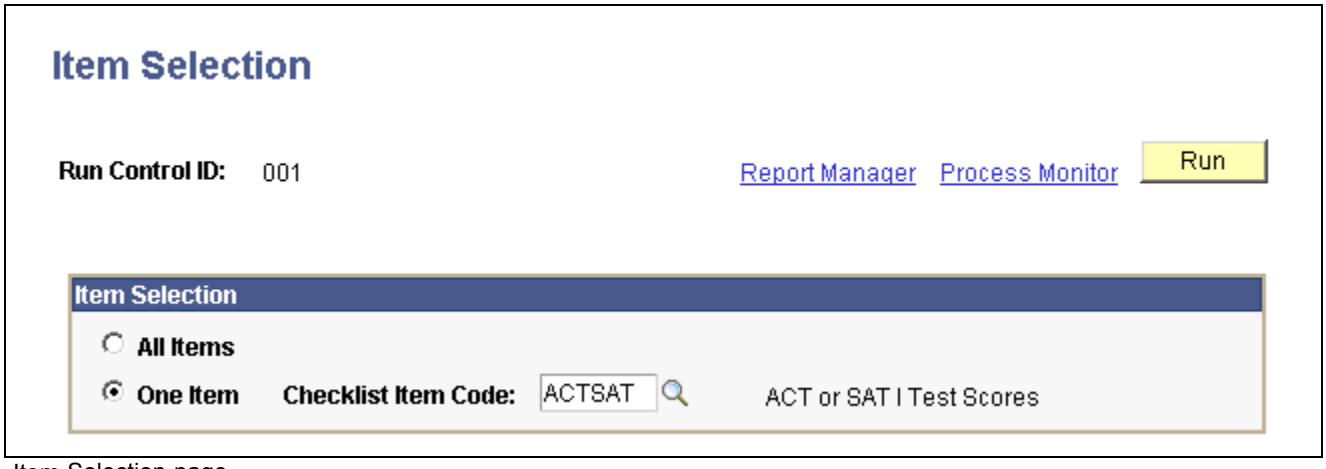
Item Status
Enter the updated status of the checklist item: *Initiated, In Progress, Completed,* and so on.

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

Status Date
When you update the status of a checklist item, the system automatically changes the status date to the system's current date. You can override this date.

Updating All or a Specific Checklist Item by Automated Process

Access the Item Selection page.



Item Selection page

Item Selection

All Items Select this to update all of the checklist items specified on the Item Update - by Item table to a status of *Complete.*

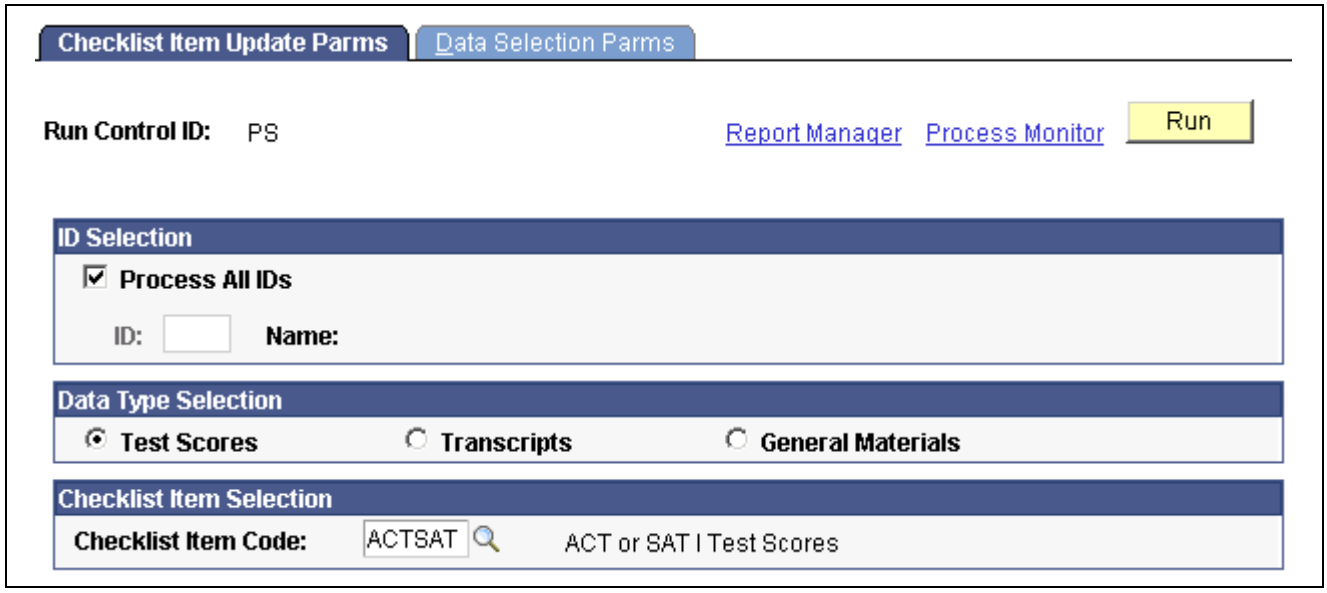
One Item and **Checklist Item Code** Select this to update the checklist item that you specify, to a status of *Complete.* You must specify the checklist item to update.

After you run the process, you can view the CCCHKLER report, which lists the IDs and the checklist item codes that were updated.

See Appendix A, "Campus Community Reports," page 585.

Updating Test Score, Transcript, or General Material Checklist Items

Access the Checklist Item Update Parms page.



Checklist Item Update Parms (parameters) page

ID Selection

Process All IDs or **ID** Select Process All IDs to update all eligible checklist items for all IDs in your system, or specify the ID of the specific individual whose checklist item the process should update.

Data Type Selection

Data type selection relates to logic in the process that provides a linkage to admissions records where the applicable data resides. When the Test Scores button is clicked, the process evaluates data in the test score table as it updates checklist items.

Test Scores Select to evaluate test score data in PeopleSoft Enterprise Recruiting and Admissions to update checklist items.

Transcripts Select to evaluate transcript data in PeopleSoft Enterprise Recruiting and Admissions to update checklist items.

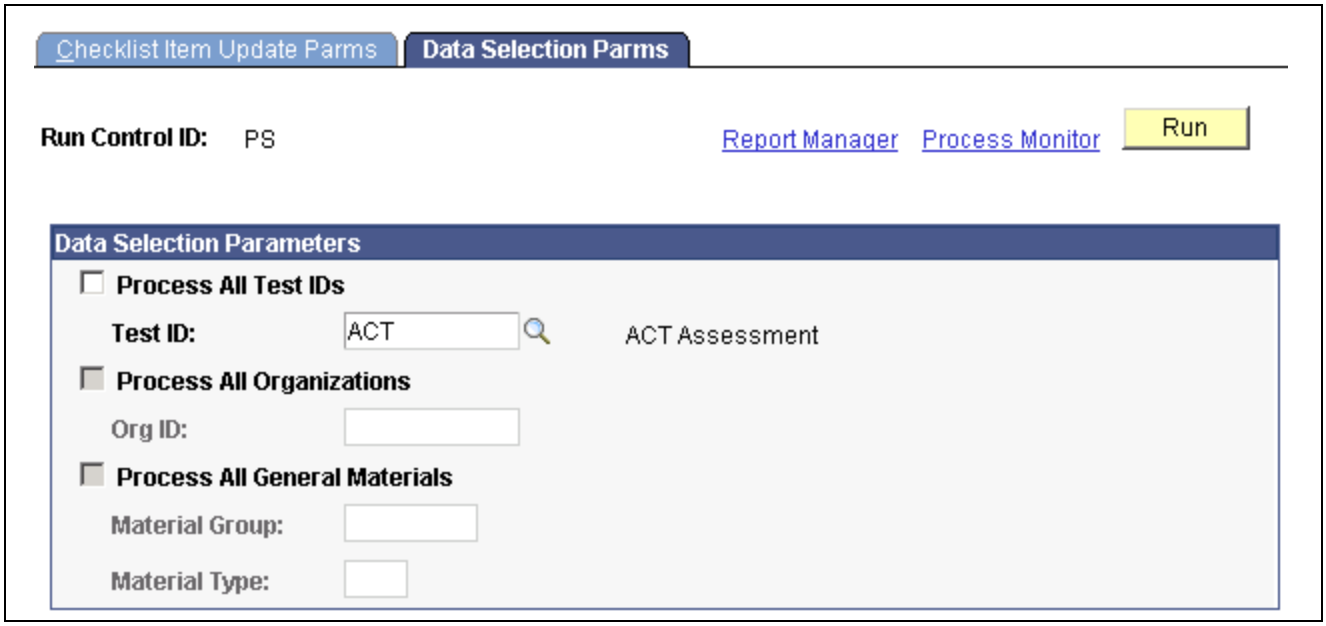
General Materials Select to evaluate general materials data in PeopleSoft Enterprise Recruiting and Admissions to update checklist items.

Checklist Item Selection

Checklist Item Code Enter the code of the checklist item to update.

Specifying the Data to Update

Access the Data Selection Parameters page.



Data Selection Parms (parameters) page

Only the data selection parameters associated with the data types selected on the Update Parameters page are available.

Data Selection Parameters

Process All Test IDs or **Test ID** Select Process All Test IDs for the process to update the checklist item for all test IDs, or specify the test from the Test Scores page (for example, *GRE* test) for which the system should update this checklist item.

If you select the Test Scores option in the Data Selection group box, you must either select Process All Test IDs or specify one test ID.

Process All Organizations or **Org ID** Select Process All Organizations to evaluate all transcript data from all organizations to update the checklist item, or, specify the organization from the Education page (for example *000010008* Apache Junction High School), for which the system should update the checklist item.

Transcripts received are recorded by Organization in the PeopleSoft Recruiting and Admissions Education page.

If you select the Transcripts option in the Data Selection group box, you must either select Process All Organizations or specify one organization ID.

Process All General Materials or Material Group or **Material Type**

Select Process All General Materials to evaluate all general materials data to update this checklist item, or specify the material group from the General Materials page (for example, *UGRECOMM,* Undergraduate Recommendations) or the specific material type from the General Materials page (for example *REC,* Recommendation), for which the system should update this checklist item.

If you select the General Materials option in the Data selection group box, you must either select Process All General Materials to process all general materials or specify one material group or a material type.

Data Type Selection

Test Scores When selected, indicates the process should evaluate the test IDs specified in the ID Selection group box to update checklist items.

Transcripts When selected, indicates the process should evaluate the transcripts for the organizations specified in the ID Selection group box to update checklist items.

General Materials When selected, indicates the process should evaluate the materials specified in the ID Selection group box to update checklist items.

Reviewing Checklists for Individuals

This section discusses how to:

- View detailed checklist data for an individual.
- View a summary of checklist item status for an individual.
- View a summary of tracking groups for an individual.
- View a summary of checklists in a tracking group for an individual.

Pages Used to Review Checklists for Individuals

Page Name	Object Name	Navigation	Usage
Checklist Detail 1 and Checklist Detail 2	PERS_CHKLST_MGMT1, PERS_CHKLST_MGMT2	Campus Community, Checklists, Person Checklists, Person Checklist Detail, Checklist Detail 1 or Checklist Detail 2	View detailed checklist data for an individual. (The Checklist Detail 1 and 2 pages are view only versions of the Checklist Management 1 and 2 pages.)
Checklist Summary	PERS_CHKLST_SUMM	• Campus Community, Checklists, Person Checklists, Person Checklist Summary • Records and Registration, 3 C's Summaries, Personal Checklist Summary	**Note.** If you license PeopleSoft Campus Self Service, you can also access the Checklist Summary page by selecting Self Service, Outreach, View Person Information, Constituent Information, Checklist Summary. View a summary of checklist item status for an individual.
Person Tracking Summary	TRACKING_SUMMARY	Campus Community, Checklists, Person Checklists, Person Tracking Summary	View a summary of tracking groups for an individual to determine the groups with which an individual's checklists are associated and view the overall status of those tracking groups.
Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Person Tracking Summary page.	View a summary of checklists in a tracking group for an individual.
Person Tracking Inquiry	TRACKING_INQUIRY	Campus Community, Checklists, Person Checklists, Person Tracking Inquiry	View the variable data with which specific tracking groups are related.

Viewing Detailed Checklist Data for an Individual

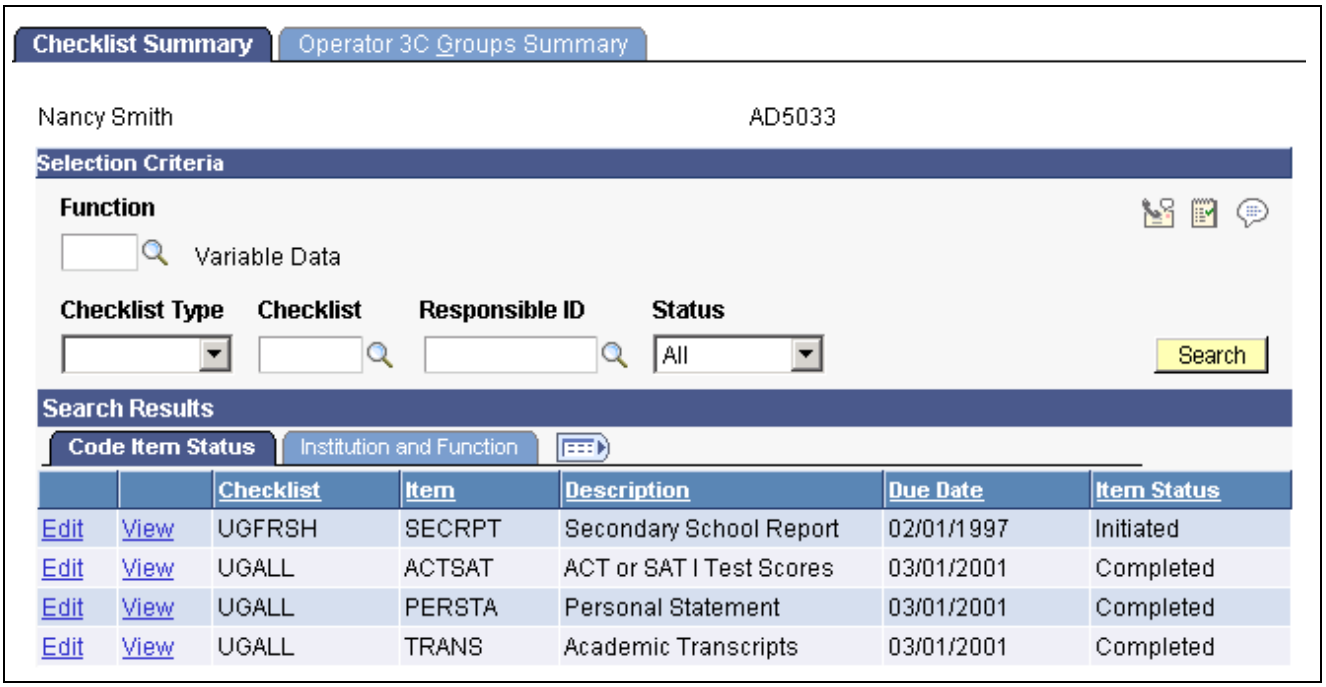
The Checklist Detail 1 and 2 pages are view-only versions of the Checklist Management 1 and 2 pages where you assign checklist items to the individual.

See Also

Chapter 33, "Managing Checklists," Assigning Checklists to Individuals, page 479

Viewing a Summary of Checklist Item Status for an Individual

Access the Checklist Summary page.



Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function The administrative area on which you want to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Checklist Type The type of checklist (for example, *Condition List, Communication List,* or *Requirements List*) for which you want to search.

Checklist Enter the code of the checklist for which you want to search. The available checklists are from the Checklists page.

Responsible ID The ID of the individual who is associated with or responsible for the checklist items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status The status of the checklists for which to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

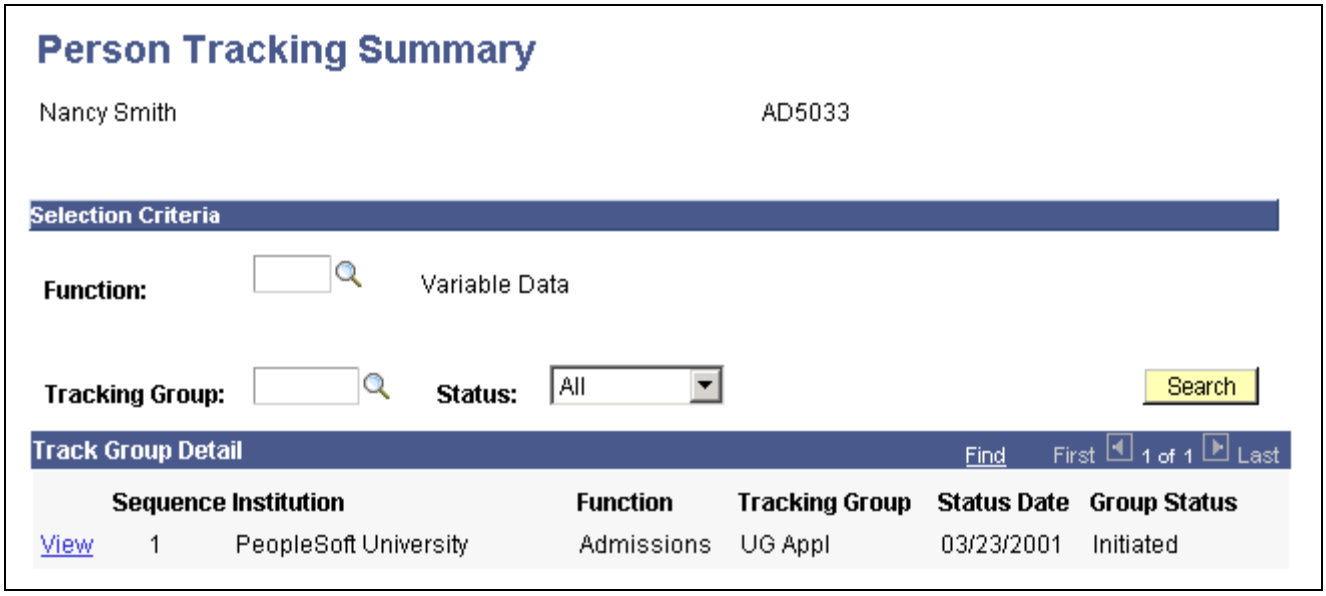
Search Click to launch the search based on the selected criteria.

Institution and Function Tab

Use the Institution and Function tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the person who assigned or is responsible for the checklist item.

Viewing a Summary of Tracking Groups for an Individual

Access the Person Tracking Summary page.



Person Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function The administrative area on which you want to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Tracking Group The tracking group on which you want to search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search Click to launch the search based on the selected criteria.

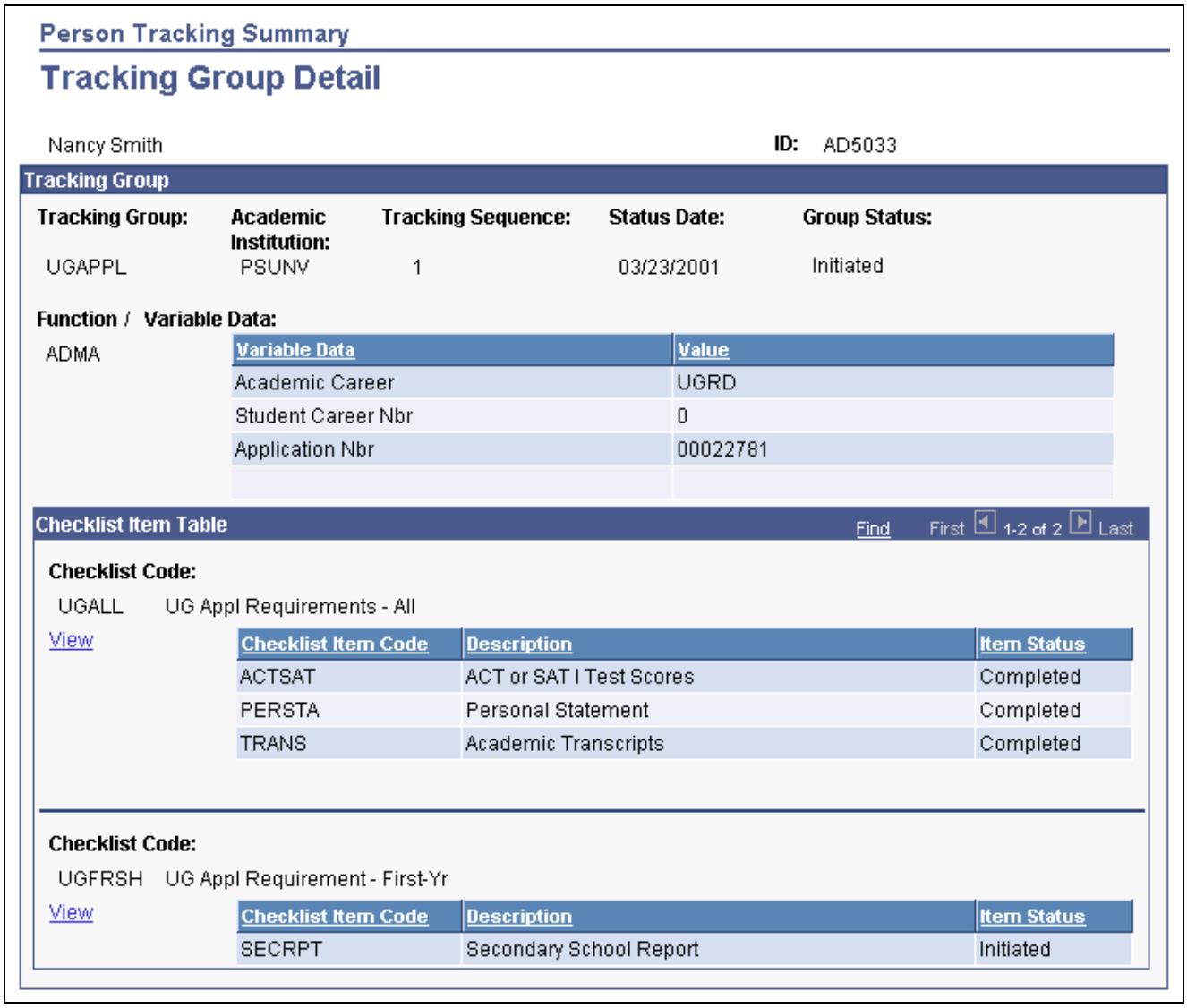
Track Group Detail

View If the user has 3C group inquiry access to view this checklist code and the administrative function is not *General,* this link is available. Click to access the Tracking Group page where you can view the checklist.

Note. If the function is *General,* the link might appear, but it will not transfer you.

Viewing a Summary of Checklists in a Tracking Group for an Individual

Access the Tracking Group Detail page.



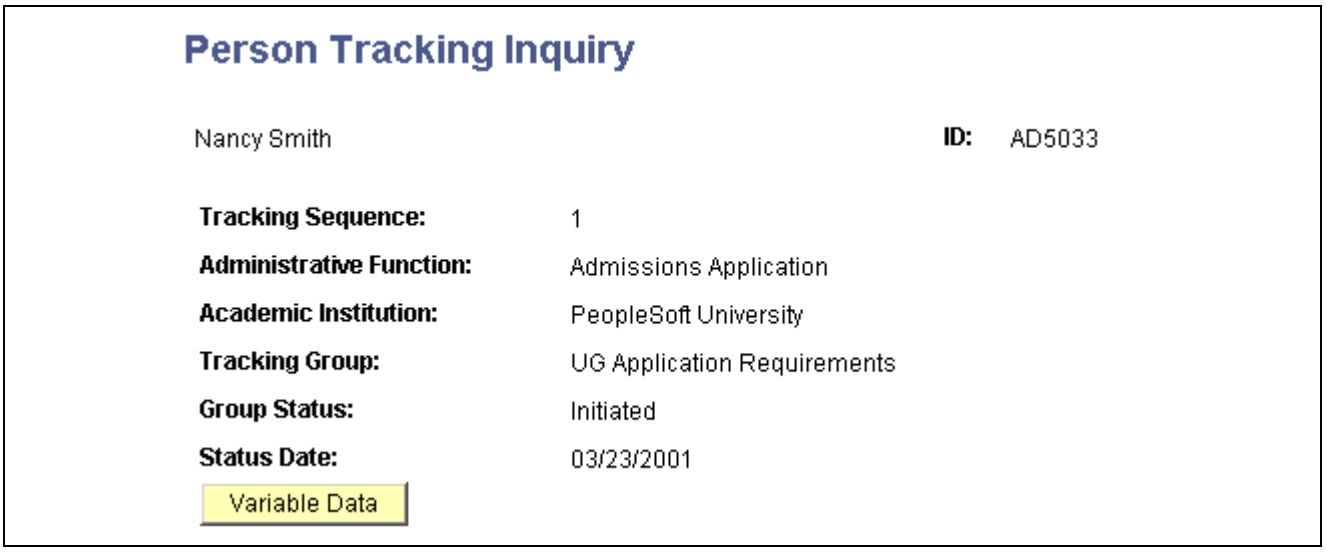
Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Click the View link to access the Checklist Detail pages for the checklist code.

Viewing Tracking Group Data

Access the Person Tracking Inquiry page.



Person Tracking Inquiry page

This page is for viewing purposes only. You cannot enter or modify data here. Click the Variable Data button to access the Variable Data page where you can review the variable data associated with this tracking group.

Reviewing Checklists for Organizations

This section discusses how to:

- View detailed checklist data for an organization.
- View a summary of checklists for an individual.
- View a summary of tracking groups for an individual.
- View a summary of checklists in a tracking group for an individual.

Pages Used to Review Checklists for Organizations

Page Name	Object Name	Navigation	Usage
Org Checklist Detail 1 and Org Checklist Detail 2	ORG_CHKLST_MGMT1, ORG_CHKLST_MGMT2	Campus Community, Checklists, Organization Checklists, Org Checklist Detail,	View detailed checklist data for an organization.
Org Checklist Summary	ORG_CHKLST_SUMMARY	Campus Community, Checklists, Organization Checklists, Org Checklist Summary	View a summary of checklist items for an organization. **Note.** If you licensed PeopleSoft Campus Self Service, you can also access the Org Checklist Summary page by selecting Self Service, Outreach, View Organization Information, Constituent Information - Org, Checklist Summary.
Organization Tracking Summary	ORG_TRACK_SUMMARY	Campus Community, Checklist, Organization Checklists, Org Tracking Summary	Review the tracking groups with which an organization's checklists are associated and the overall status of those tracking groups
Organization Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Organization Tracking Summary page.	Review information about a tracking group checklist for an organization.
Organization Tracking Inquiry	ORG_TRACK_INQUIRY	Campus Community, Checklists, Organization Checklists, Org Tracking Inquiry	View the variable data with which specific tracking groups are related.

Viewing Detailed Checklist Data for an Organization

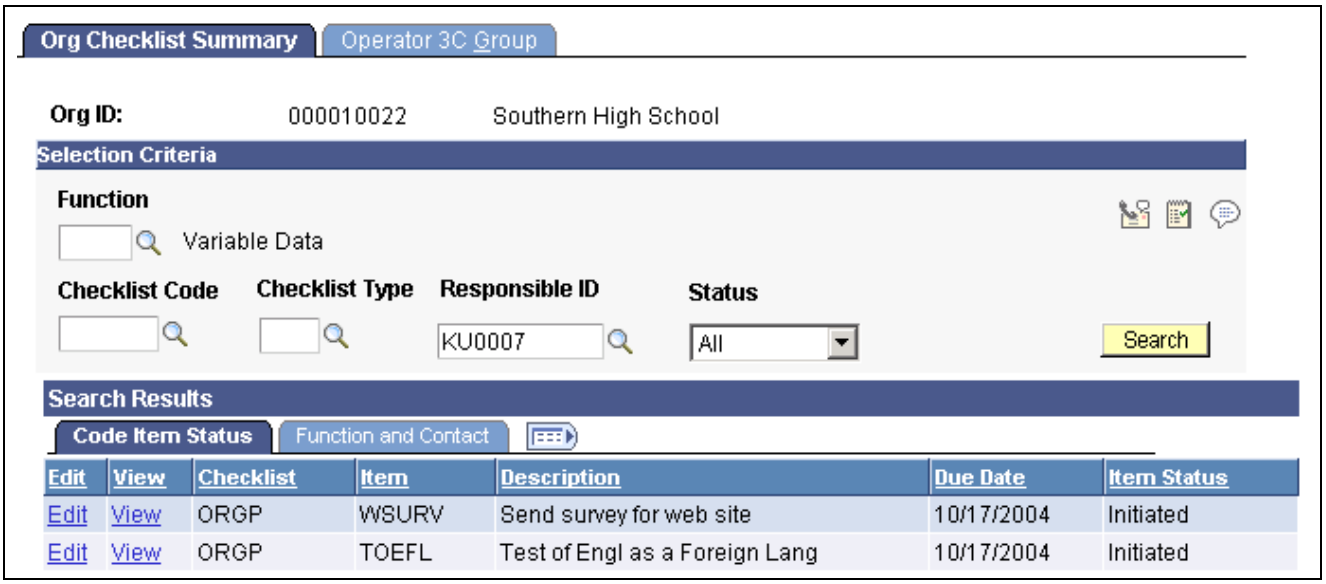
The Organization Checklist Detail 1 and 2 pages are view-only versions of the Organization Checklist Management 1 and 2 pages where you assign checklist items to the organization. You cannot enter or edit data here.

See Also

Chapter 33, "Managing Checklists," Assigning Checklists to Organizations, page 483

Viewing a Summary of Checklist Item Status for an Organization

Access the Org Checklist Summary page.



Org Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for this organization and displays the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Function The administrative area on which you want to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this organization

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

See Chapter 33, "Managing Checklists," Assigning a Checklist to an Organization, page 484.

Checklist Code The checklist on which you want to search. The available checklists are from the Checklists page.

Checklist Type The type of checklist (*Condition List, Communication List, Requirements List,* and so on) for which you want to search.

Responsible ID The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search Click this button to launch the search based on the selected criteria.

Click the Communication button to transfer to the Organization Communication 1 page, where you can add a new communication for this organization.

Click the Checklist button to transfer to the Assigning a Checklist to an Organization, where you can add a new checklist for this organization.

Click the Comment button to transfer to the Organizational Comment Entry page, where you can enter a new comment for this organization.

Code Item Status Tab

Edit Click this link to access the Org Checklist Management 1 page, where you can edit the checklist.

The Edit link is available only if the user has 3C group update access for this checklist code.

View Click this link to access the Org Checklist Management 1 page, where you can view the checklist.

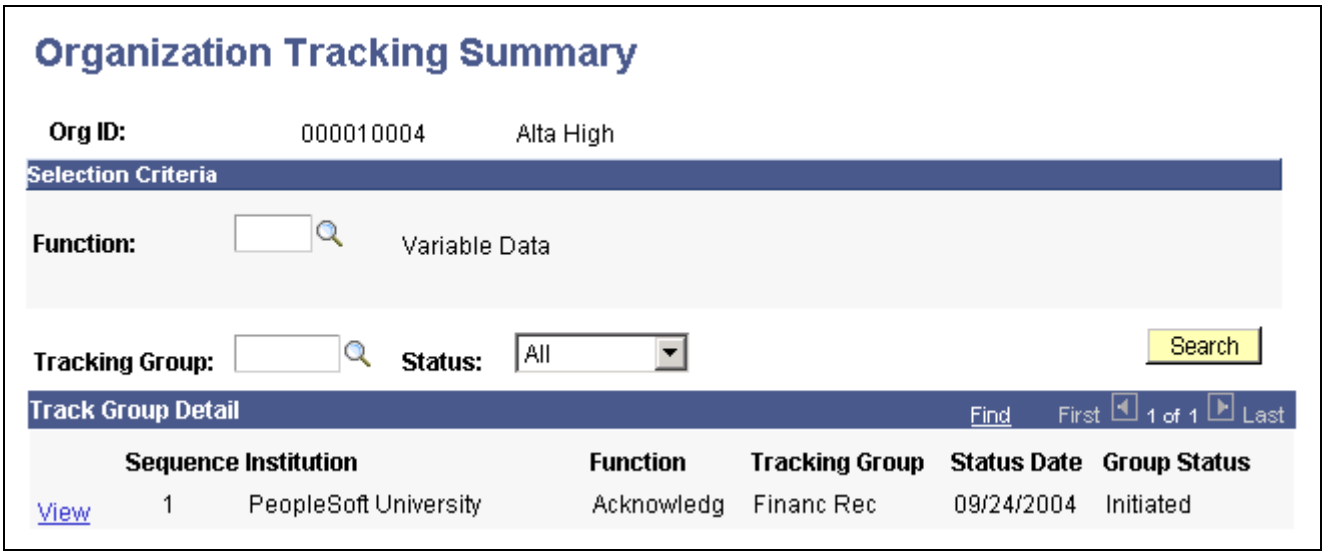
The View link is available only if the user has 3C group inquiry access for this checklist code.

Function and Contact Tab

Use the Function and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.

Viewing a Summary of Tracking Groups for an Organization

Access the Organization Tracking Summary page.



Organization Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function The administrative area on which to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Tracking Group The tracking group on which to search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Track Group Detail

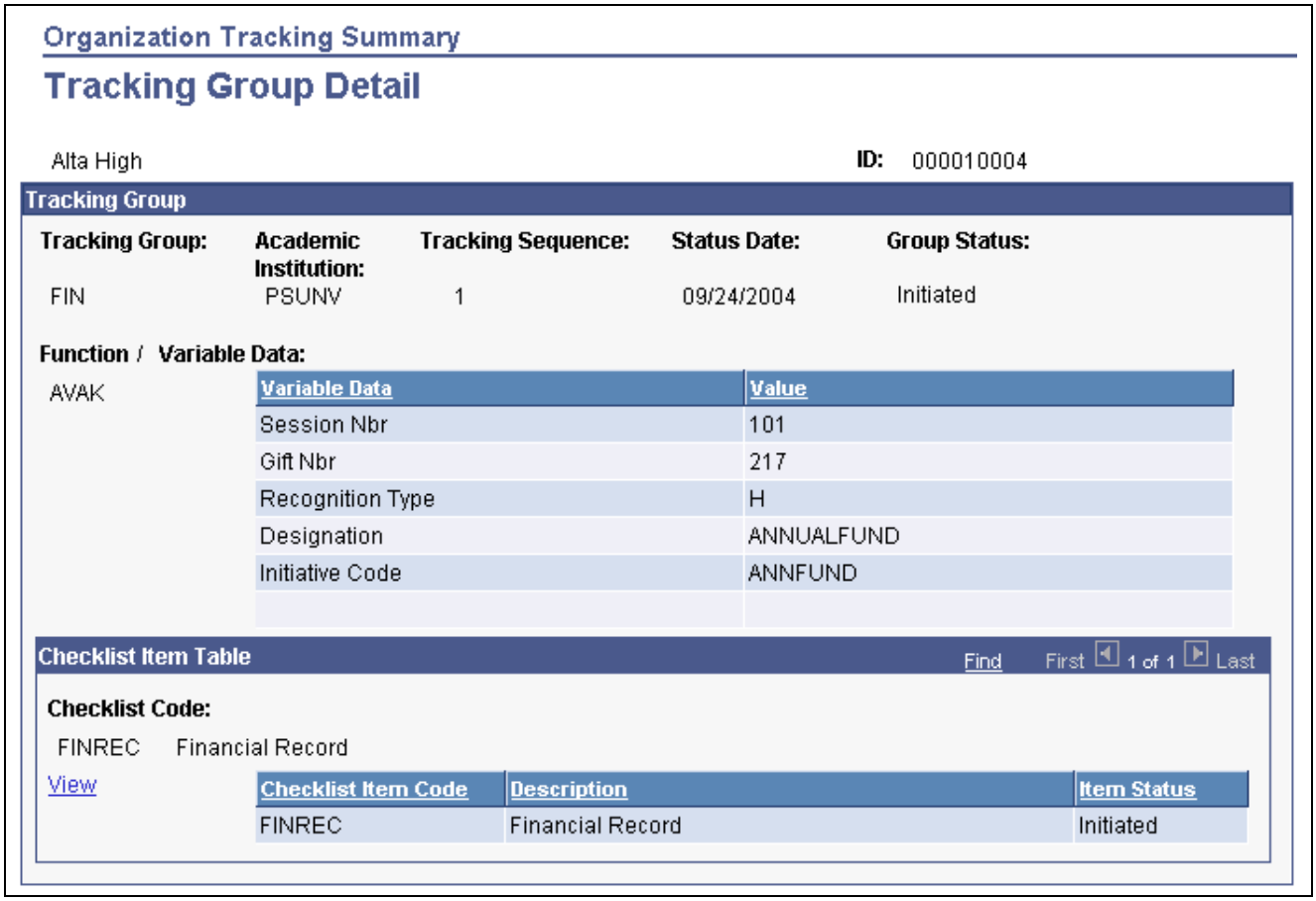
View If the user has 3C group inquiry access for this checklist code and the administrative function is not *General*, this link is available.

Click this link to access the Tracking Group Detail page where you can view the checklist.

Note. If the function is *General,* the link might appear on the page, but it will not transfer you.

Viewing a Summary of Checklists in a Tracking Group for an Organization

Access the Tracking Group Detail page.



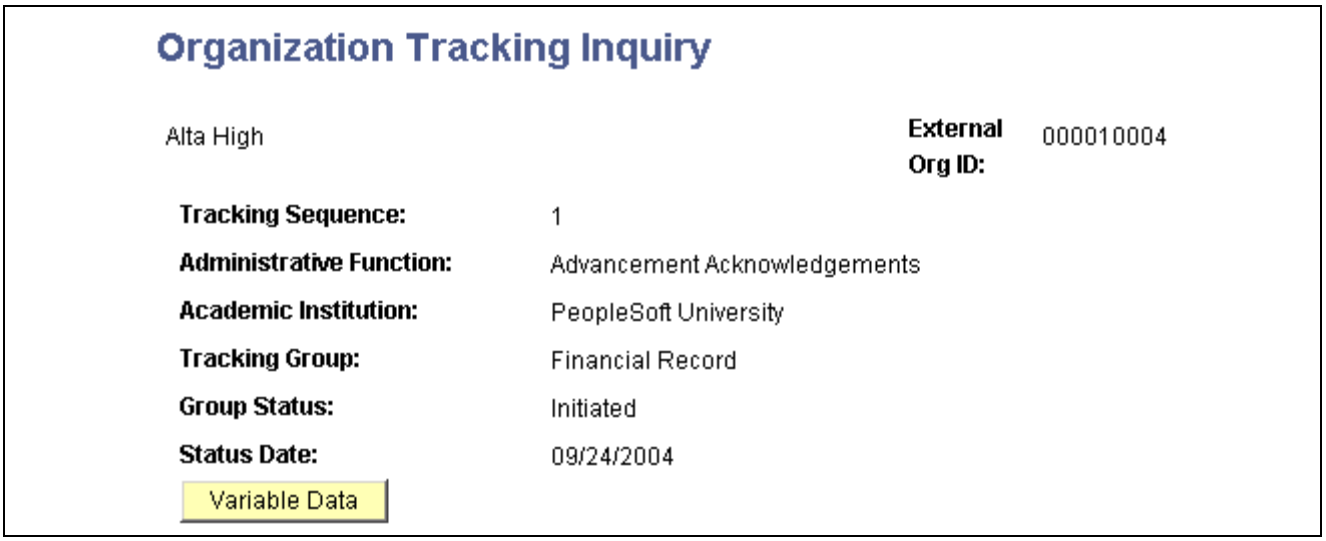
Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Click the View link to access the Org Checklist Detail 1 page for the checklist code.

Viewing Tracking Group Data

Access the Person Tracking Inquiry page.



Person Tracking Inquiry page

This page is for viewing purposes only. You cannot enter or modify data here. Click the Variable Data button to access the Variable Data page where you can review the variable data associated with this tracking group.

Reviewing Checklists for Events

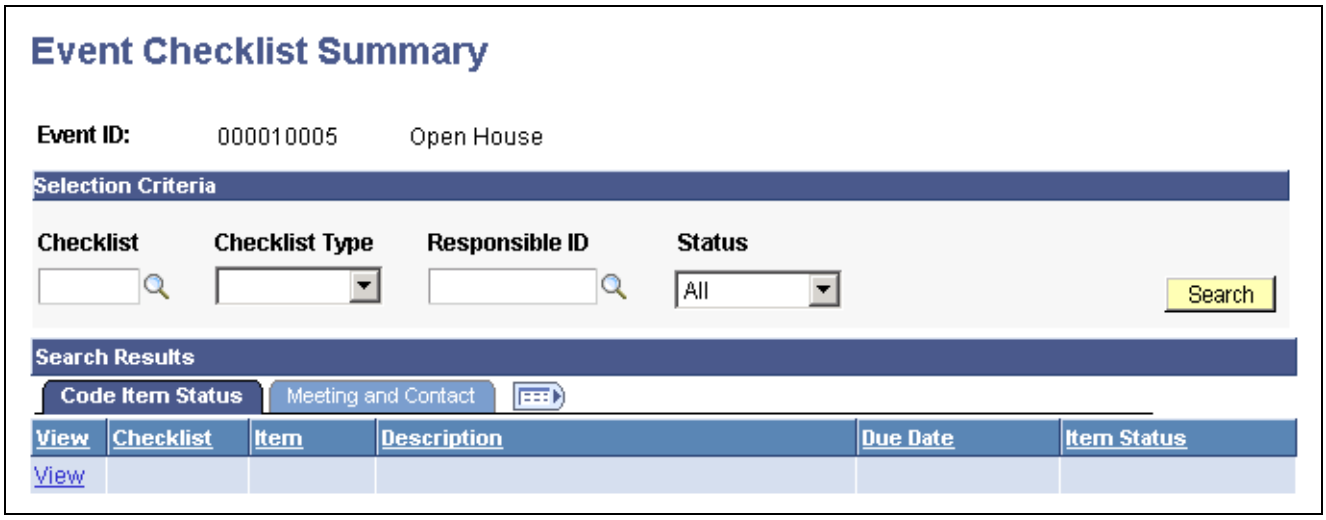
This section discusses how to view all checklist items assigned to an event.

Page Used to Review Checklists for Events

Page Name	Object Name	Navigation	Usage
Event Checklist Summary	EVENT_CHKLST_SUMM	Campus Community, Checklists, Event Checklists, Event Checklist Summary	Review all of the checklist items assigned to an event.

Viewing All Checklist Items Assigned to an Event

Access the Event Checklist Summary page.



Event Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system will search for all checklists for this organization and display the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Checklist The checklist on which to search. The available checklists are from the Checklists page.

Checklist Type The type of checklist (for example, *Condition List, Communication List,* or *Requirements List*) for which you want to search.

Responsible ID The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search Click this button to launch the search based on the selected criteria.

Code Item Status Tab

View Click to access the Event Checklist Management 1 page where you can view the checklist.

The View link is available only if the user has 3C group inquiry access for this checklist code.

Meeting and Contact Tab

Use the Meeting and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.

CHAPTER 34

Adding Organizations to Your Database

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

- Create organization records.
- Enter school-related data.
- Enter affiliations.

Understanding Organizations

Organizations can include high schools, colleges or universities, community or civic groups, government entities, test and transcript data companies, office supply vendors, and so on. You can create a record for each organization and enter the location of the organization with telephone numbers and electronic addresses. You can enter persons at the organization with whom your institution maintains contact and specify the primary location, department, and contact person that your institution should use.

For schools, you can identify the subjects and courses that they offer, the types of transcripts they generate, and their term, grading, and credit structure. Maintaining this information helps to convert their information into an equivalent at your institution so you can evaluate it according to your requirements.

After you set up group types, contact types, and external subjects, terms, and courses, you can add organizations to your database and select from those items to help describe or identify each organization.

To add an organization to your system, create an organization record on the Organization Table page. When you enter data and save the record, the system assigns the next available sequential organization ID to that organization and adds the record to your database. That ID remains associated with the organization unless you change or delete it. You can use the organization name or its unique ID to access the record and update the organization information and specify primary contacts, locations, departments and so on.

Important! When you save the new organization record, the system does not notify you if a duplicate organization already exists. The system assigns the ID and adds the organization. To avoid creating duplicate records, configure the system to notify you of duplicates by using Search/Match to determine if an organization with the same data already exists in your database before adding the new one.

See Chapter 20, "Searching for Records and Using Search/Match," page 181.

When an organization is a supplier, you can identify it as a vendor and make note of the taxpayer identification number (TIN).

When an organization is also a school or other institution that offers courses, you can identify and track the subject areas that the organization offers and the specific courses that it offers within that subject area. Maintaining subject and course data is especially valuable when evaluating transcripts from other institutions.

You can identify items that are important to your institution's academic affiliations with organizations, including their grading structure and the types of transcripts that they generate. Maintaining this information helps you convert their information into an equivalent at your institution so that you can evaluate.

You update organization data on the Organization Table page and other organization pages, but in the Update/Display mode after adding the organization.

Warning! Before adding organizations or entering and updating data about them, you must be familiar with PeopleSoft applications, including the *Add, Update/Display, Include History,* and *Correct History* modes and the PeopleSoft system's method of applying effective dates with active or inactive status.

See *Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, "Understanding Effective Dates"*

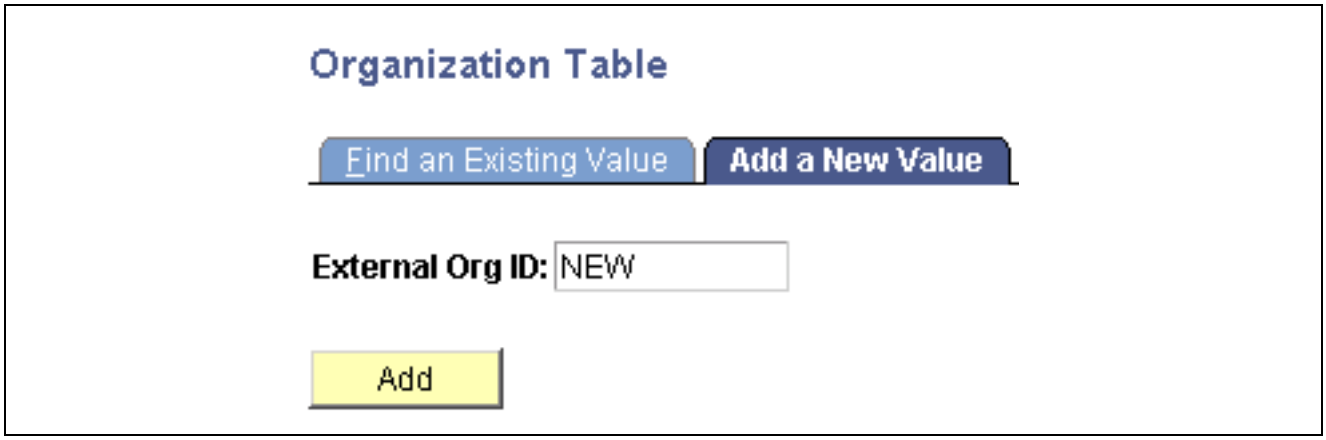
To create an organization record:

1. Select Campus Community, Organization, Create/Maintain Organizations, Organization Table.
2. Select the Add a New Value link at the bottom of the Organization Table - Find an Existing Value search page.

   The Organization Table - Add a New Value search page appears with *NEW* in the External Org ID field.
3. Click the Add button.

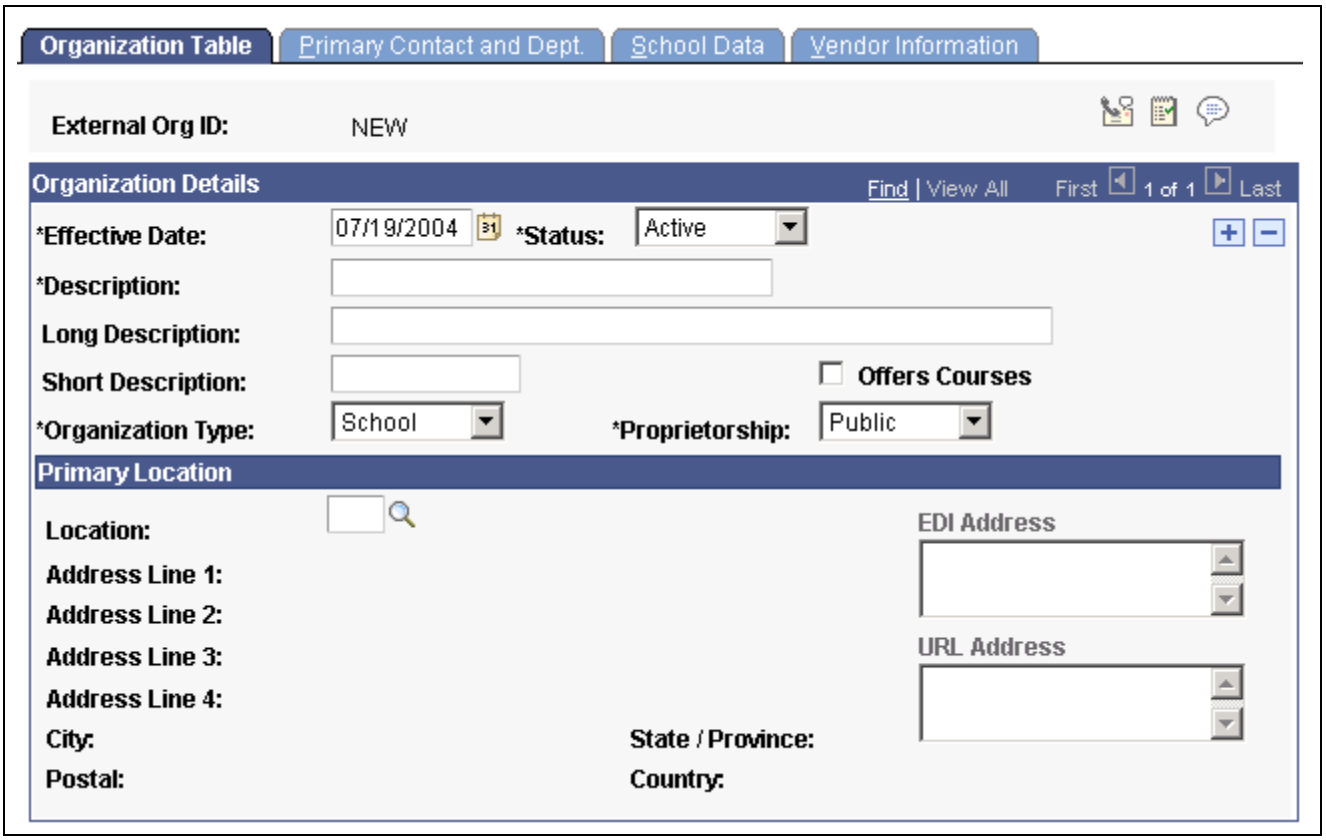
   The Organization Table page appears with ID of *NEW.*

Warning! If you overwrite the word *NEW* in the External Org ID field on the Organization Table - Add a New Value and manually enter an ID for the organization that you are adding, you disrupt the system's autonumbering sequence. A system administrator might need to intervene to correct the situation.



Organization Table - Add a New Value search page

This example shows the Organization Table page when you are adding a new record:



Adding a new record on the Organization Table page (EXT_ORG_TABLE)

1. Enter at least the required data (Effective Date, Status, Description, Organization Type, and Proprietorship) on the Organization Table page to add the new record.

   Warning! If you select Save before completing the required data, you must use the Correct History mode to continue entering or modifying the effective-dated data.

2. Select Save.

   The system assigns the next available unique organization ID to the record and adds it to your database.

See Also

Chapter 35, “Managing Organization Data,” Reviewing Organization Data, page 535

Chapter 12, “Setting Up Organization Data,” page 115

Chapter 36, “Loading External Organization Data,” page 547

Creating an Organization Record

This section lists prerequisites and discusses how to:

- Identify the organization.
- Identify the primary contact and department.

- Identify the organization as a school.
- Identify the organization as a vendor.

Prerequisites

Before adding an organization to the database, set up organization groups and types, and set up organization departments and contacts. If the organization is a school, also make sure that external subjects and terms are set up.

See Also

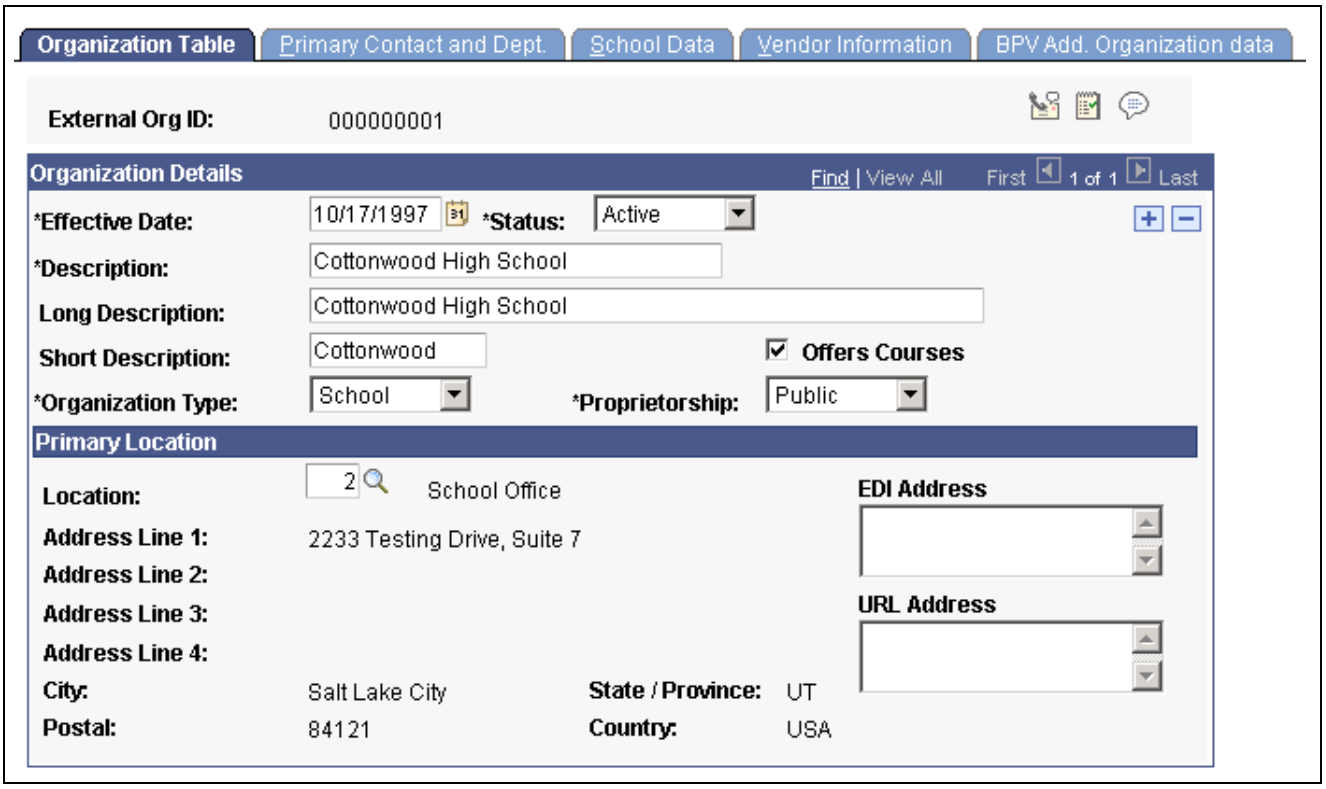
Chapter 12, "Setting Up Organization Data," page 115

Pages Used to Create an Organization Record

Page Name	Object Name	Navigation	Usage
Organization Table	EXT_ORG_TABLE	Campus Community, Organization, Create/Maintain Organizations, Organization Table	Identify the organization.
Primary Contact and Department	EXT_ORG_PRIM_INFO	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Primary Contact and Dept.	Identify the department and persons that your institution should contact for an organization.
School Data	EXT_ORG_SCHL_DATA	Campus Community, Organization, Create/Maintain Organizations, Organization Table, School Data	Enter data that applies to an organization that offers courses.
Vendor Information	EXT_ORG_VNDR_INFO	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Vendor Information	Identify an organization as a vendor.
BPV Add. Organization data	SAD_BPV_ORG_AD_NLD	Campus Community, Organization, Create/Maintain Organizations, Organization Table, BPV Add. Organization data	Specify the academic organization with which the organization is associated.

Identifying the Organization

Access the Organization Table page.



Organization Table page

Note. When you create the record for the first time and you enter a description in the Description field and exit the field, the system automatically enters *Long Description, Short Description, Organization Type* and *Proprietorship* field values. You can override these values.

Organization Details

Offers Courses When selected, indicates that this organization offers courses, whether or not those course offerings are central to the organization's mission. This makes entering data on the School Data page possible.

Organization Type The type of organization *(Business, Non-Profit, Other,* or *School)* that describes this organization.

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

Proprietorship The type of primary owner or funding source *(Other, Private, Public,* or *Religious)* of this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Primary Location

If you are creating this organization record for the first time, primary locations are unavailable. Assign locations to the organization after you create and save the record. When the record exists, and you have set up locations on the Organization Locations page, return to the Organization Table page to indicate the primary location.

Location This location's number from the Organization Locations page.

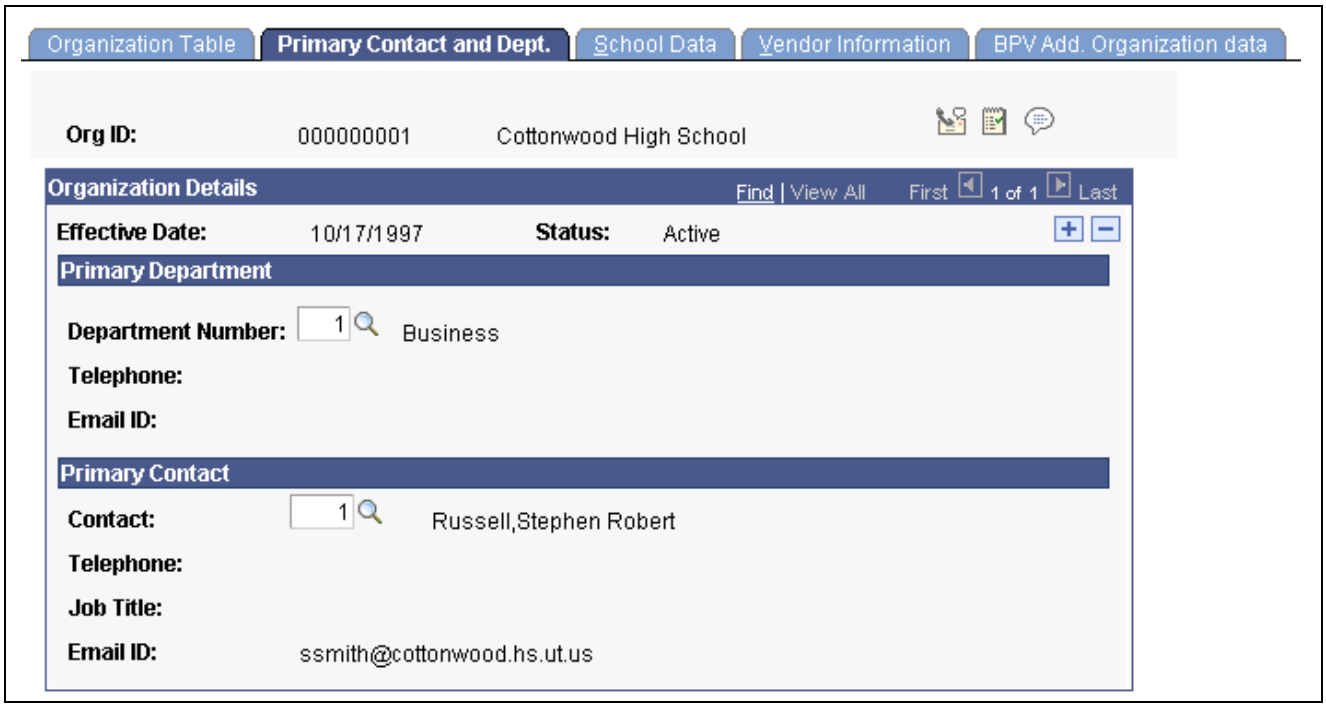
When you select the location number and exit the field, the system automatically displays the associated Electronic Data Interchange (EDI) and Uniform Resource Locator (URL) addresses for you.

EDI Address The EDI address for this location.

URL Address The URL web address for this location.

Identifying the Primary Contact and Department

Access the Primary Contact and Dept. page.



Primary Contact and Dept. (department) page

Primary Department

If you are creating this organization record for the first time, primary contact persons are unavailable. Assign contacts to the organization after you create and save the record. When the record exists and you have set up contacts on the Organization Contacts page, return to the Primary Contact and Depart. page and indicate the primary contact persons here.

Department Number This contact department's number from the Organization Departments page.

When you select the department number and exit the field, the system automatically displays the associated preferred telephone and email address.

Telephone The department's preferred phone number.

Email ID The department's email address.

Primary Contact

If you are creating this organization record for the first time, primary contact persons are not available. You must assign contacts to the organization after you create and save the record in your database. When the record exists and you have set up contacts on the Organization Contacts page, you can come back and select from those contacts to indicate the primary contact persons here.

Contact This contact person's number from the Organization Contacts page.

When you select the contact person's number and exit the field, the system automatically displays the associated preferred telephone number, job title, and email address.

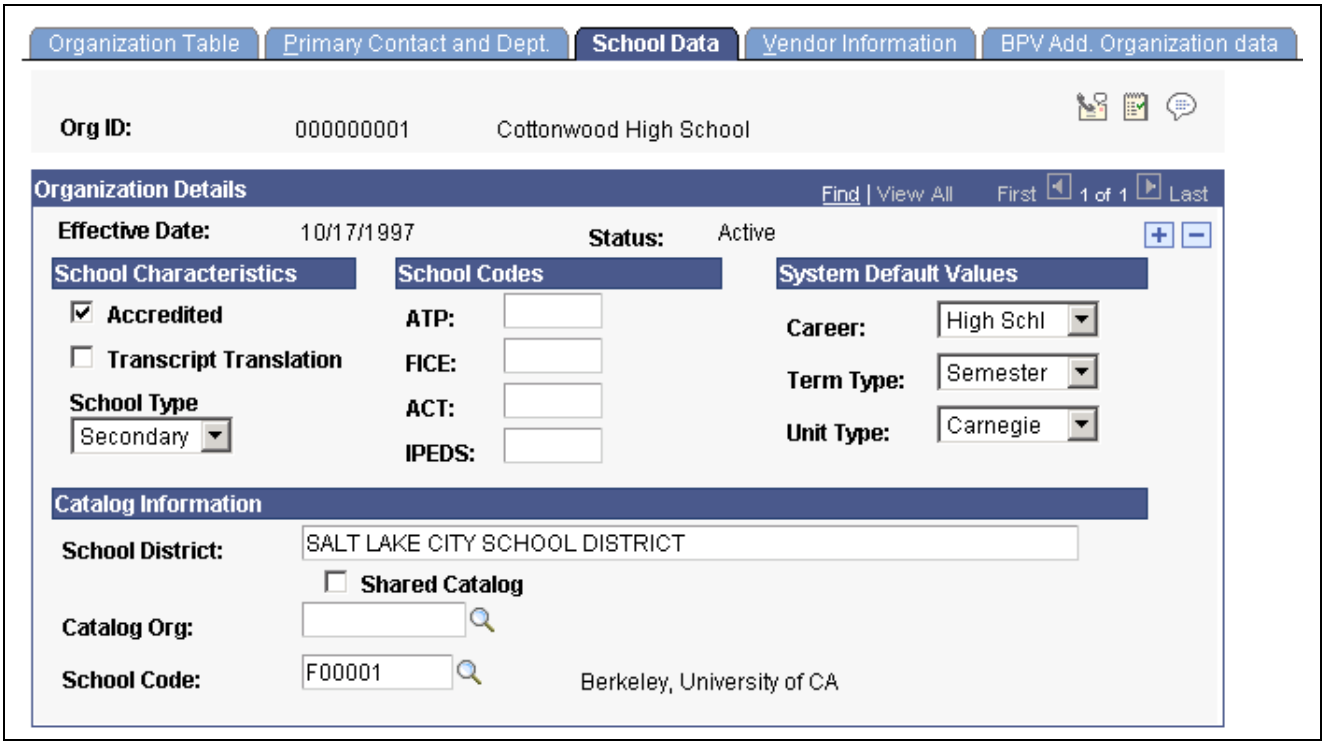
Telephone This contact person's preferred telephone number.

Job Title This contact person's job title.

Email ID This contact person's email address.

Identifying the Organization as a School

Access the School Data page.



School Data page

School Characteristics

Accredited When selected, indicates that this school is accredited.

Transcript Translation When selected, indicates that transcripts from this school are in a foreign language and must be translated.

School Type The type, from the School Type Table page, that describes this school.

See *PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook*, "Setting Up Prospects," Setting Up School Types.

Warning! You must use the School Type Table setup page in the LS_SCHL_TYPE_TABLE component (Set Up SACR, Common Definitions, External Education, School Type Table) to set up or modify school type values for Campus Solutions pages. HRMS also uses school types, but these are defined inside the SCHOOL_TYPE_TBL record in the SCHOOL_TYPE_TBL page of the SCHOOL_TYPE_TABLE component. If you modify or add values in the HRMS table, you will not see the changes on the Campus Solutions pages.

School Codes

ATP The ATP code for this school.

FICE The FICE code for this school.

ACT The ACT code for this school.

IPEDS The IPEDS code for this school.

System Default Values

Career The default career level that is associated with this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Term Type The default term type that is associated with this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Unit Type The default credit or term type that further describes the term type associated with this organization.

PeopleSoft Enterprise Recruiting and Admissions uses this field for information only. For example, your admissions office might describe the external term as having a *Quarter* term unit type with a *No Credit* unit type value.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Catalog Information

School District The district in which this organization is located.

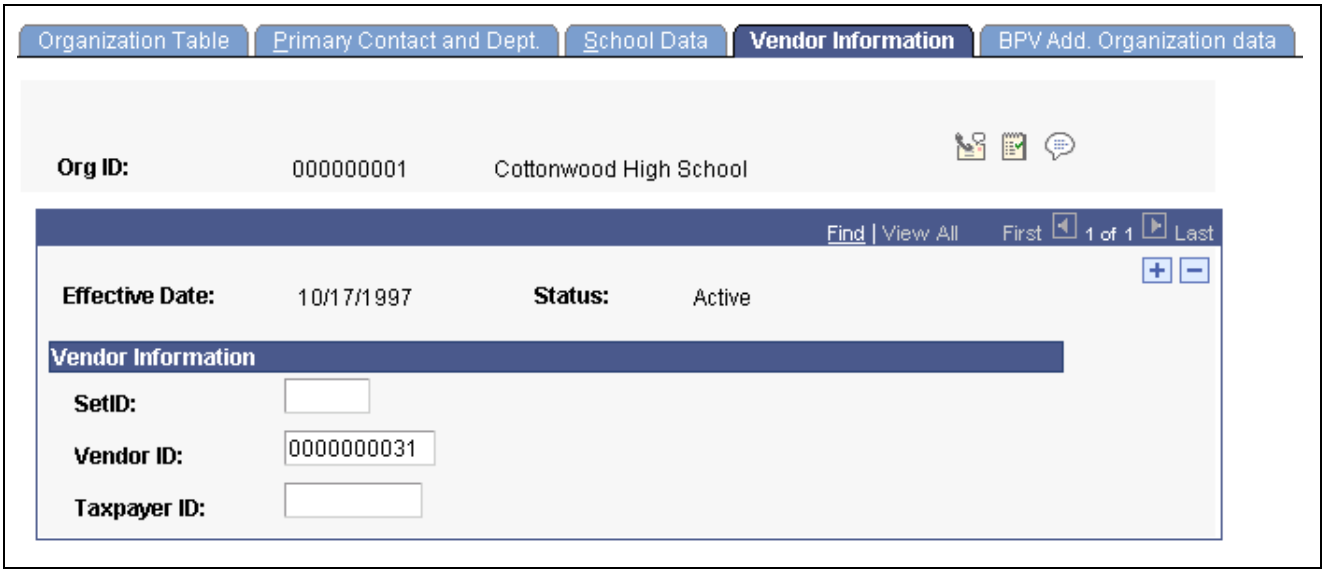
Shared Catalog When selected, indicates that this organization participates in a shared catalog with another school.

Catalog Organization The secondary school with which this organization shares a catalog.

School Code The code for the higher education institution with which this organization shares a catalog.

Identifying the Organization as a Vendor

Access the Vendor Information page.



Vendor Information page

Vendor Information

SetID The setID of the department at your institution that does business with or is responsible for paying the bills from this vendor.

Vendor ID The number or other descriptor that your institution uses for this vendor

Taxpayer ID This vendor's taxpayer identification number.

Entering School Related Data

This section discusses how to:

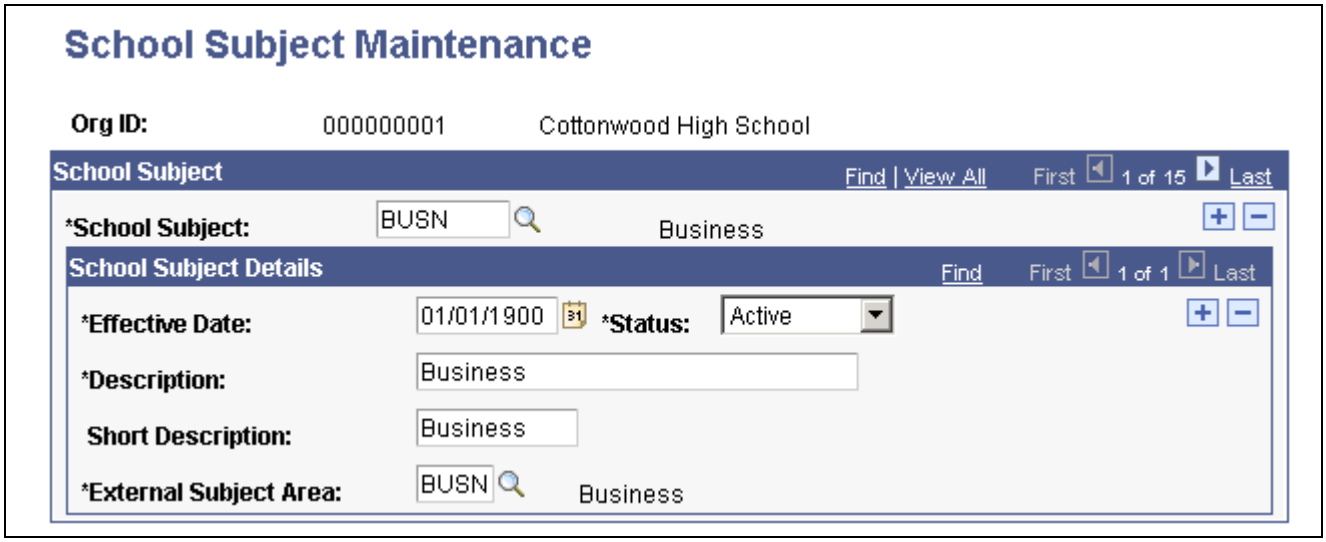
- Enter subjects offered by the school.
- Enter the courses offered within a subject area.
- Set defaults for TS130 electronic transcripts

Pages Used to Enter School Related Data

Page Name	Object Name	Navigation	Usage
School Subject Maintenance	SCHOOL_SUBJECTS	Campus Community, Organization, Create/Maintain Organizations, School Subject Maintenance	Enter subject areas offered by the school and relate them to subject areas that your institution offers.
School Course Classification	SCHOOL_COURSES	Campus Community, Organization, Create/Maintain Organizations, School Course Classification	Enter the courses offered for each of the organization's subject areas.
Organization TS130 Setup	ORG_E_ADDR_TS	Campus Community, Organization, Create/Maintain Organizations, Organization TS130 Setup	Enter defaults for sending TS130 electronic transcripts to a school.

Entering Subjects Offered by the Organization

Access the School Subject Maintenance page.



School Subject Maintenance page

School Subject

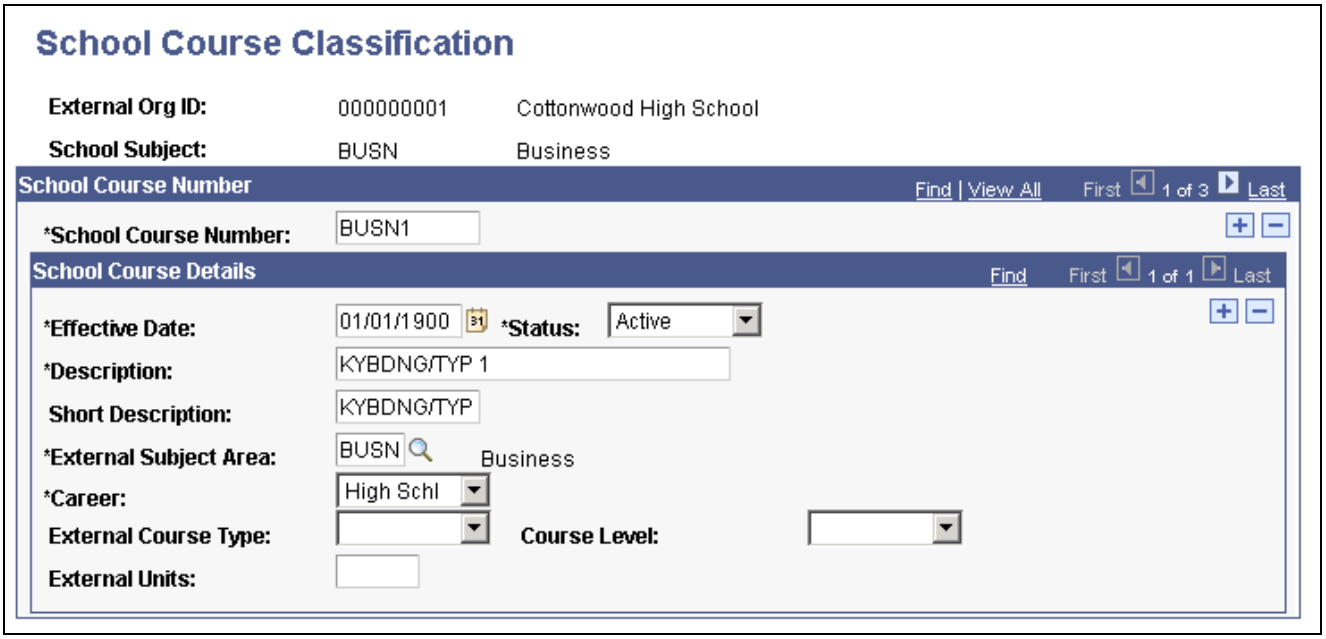
School Subject Enter the subject offered by your institution for which you want to track the equivalent subject at an external school.

School Subject Details

External Subject Area Enter the broad external subject area, from the External Subject Table page, that encompasses this subject at your institution.

Entering the Courses Offered Within a Subject Area

Access the School Course Classification page.



School Course Classification page

School Course Number

School Course Number Enter the number of the external course, usually the catalog number.

School Course Details

External Subject Area Enter the code, from the External Subjects Table page, that describes the subject area of this external course. When courses have different names but are similar in subject—for example, Chemistry and Biology—you can represent both by the single subject that you select here, such as LABS (for Laboratory Science).

Career Enter the career level (for example, *Undergraduate, Graduate,* or *PostDoc*) of this external course.

Values for this field are delivered with the system as translate values. You can modify these translate values.

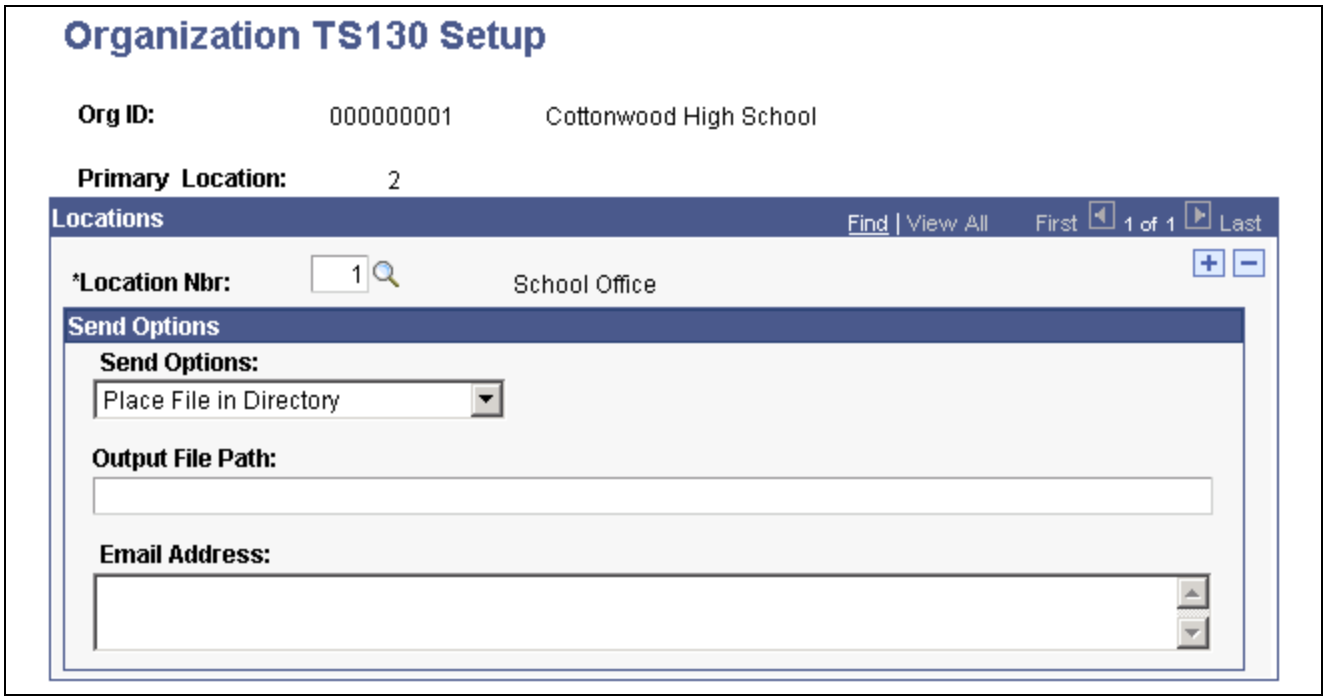
Course Level Enter the level (for example, *Freshman, Graduate,* or *Honors*) at which this course is offered.

Values for this field are delivered with the system as translate values. You can modify these translate values.

External Units Enter the number of units offered by this external course.

Setting Defaults for TS130 Electronic Transcripts

Access the Organization TS130 page.



Organization TS130 Setup page

Enter defaults for sending electronic transcripts to the school. You can specify a directory in which to save the files and send them regularly in a group as FTP or any way that you choose. Or, you can send the transcripts by email, in which case you must enter the destination email address.

When creating a TS130 request, you can override the default values.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Transcripts," Setting Up Electronic Transcript Processing

Entering Affiliations with Organizations

This section lists prerequisites and discusses how to enter organization affiliation details.

Prerequisites

Before entering affiliation information, set up GPA types, grading schemes, grading bases, and transcript details.

See Also

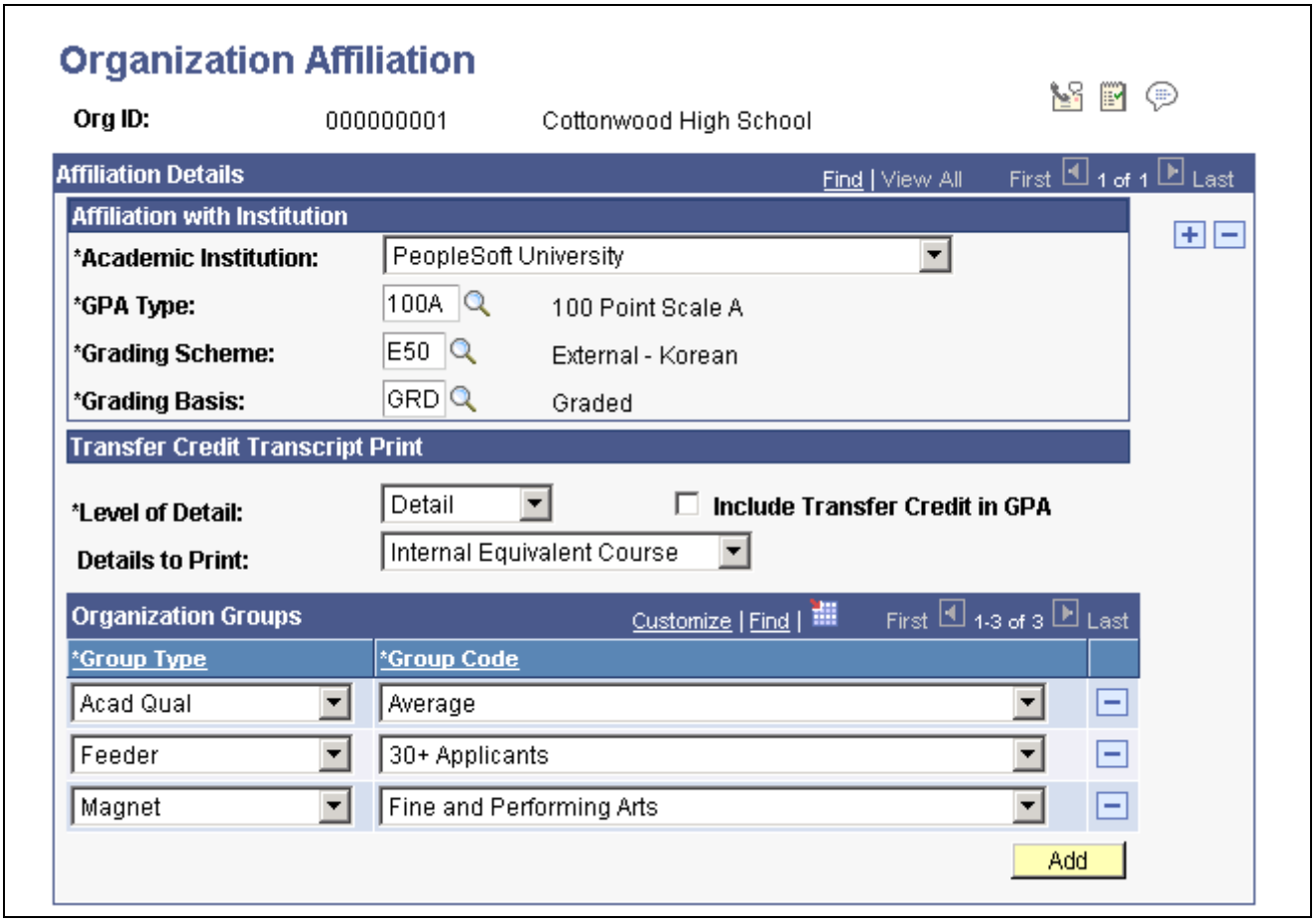
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts"

Page Used to Enter Affiliations with Organizations

Page Name	Object Name	Navigation	Usage
Organization Affiliation	EXT_ORG_AFFLTN	Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation	Enter organization affiliations details.

Entering Organization Affiliation Details

Access the Organization Affiliation page.



Organization Affiliation page

Affiliation with Institution

Academic Institution Enter the institution with which this organization is affiliated.

GPA Type Enter the type of grade point average used by this organization.

Grading Scheme Enter the type of grading scheme used by this organization.

Grading Basis Enter the grading basis used by this organization.

Transfer Credit Transcript Print

Level of Detail Enter the level of detail of the transfer credit to print on the transcript.

Summary: Indicates that the system prints the total transferred units and GPA on the student's transcript.

Detail: Indicates that the system prints the information that you specify in the Details to Print field.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Include Transfer Credit in GPA Select to include the transfer credit from this organization in the student's GPA.

Details to Print This is available only when you select *Detail* in the Level of Detail field. Select the details that you want the system to print on the transcript:*None, External Courses, External and Internal* or *Internal Equivalent Course.*

You should not modify these values.

Organization Groups

Group Type Enter the type of group, from the Organization Group Table page, to which this organization belongs.

Group Code Enter the code associated with the specified group type, which further describes the group to which this organization belongs.

CHAPTER 35

Managing Organization Data

This chapter provides an overview of updating organization data and discusses how to:

- Enter organization location data.
- Enter organization department data.
- Enter organization contact data.
- Review organization data.
- Use organization search.
- Manage organization IDs.
- Enter codes for external organizations.

See Also

Chapter 34, "Adding Organizations to Your Database," page 511

Chapter 19, "Managing IDs," Deleting Organization IDs, page 176

Chapter 19, "Managing IDs," Changing an External Organization ID, page 177

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, "(CAN) Setting Up to Receive OUAC Transactions," Setting Up OUAC Organizations

Understanding Organization Data

You can enter information about an organization's various locations, including its addresses and phone numbers. You can enter as many locations for an organization as you need. After you enter this information, you can use it to specify the primary location for the organization.

You can enter information about an organization's various department names, locations, and email addresses. You can enter as many departments for an organization as you need. After you enter this information, you can use it to specify the primary department for this organization on the Organization Table page.

You can enter information about the people that your institution should contact at an organization, including the person's name, job title, and telephone numbers. You can enter as many contacts for an organization as you need. After you enter this information, you can use it to specify the primary contact for this organization on the Organization Table page.

You can review lists of all the locations, departments, and contacts for an organization.

Entering Organization Location Data

This section discusses how to:

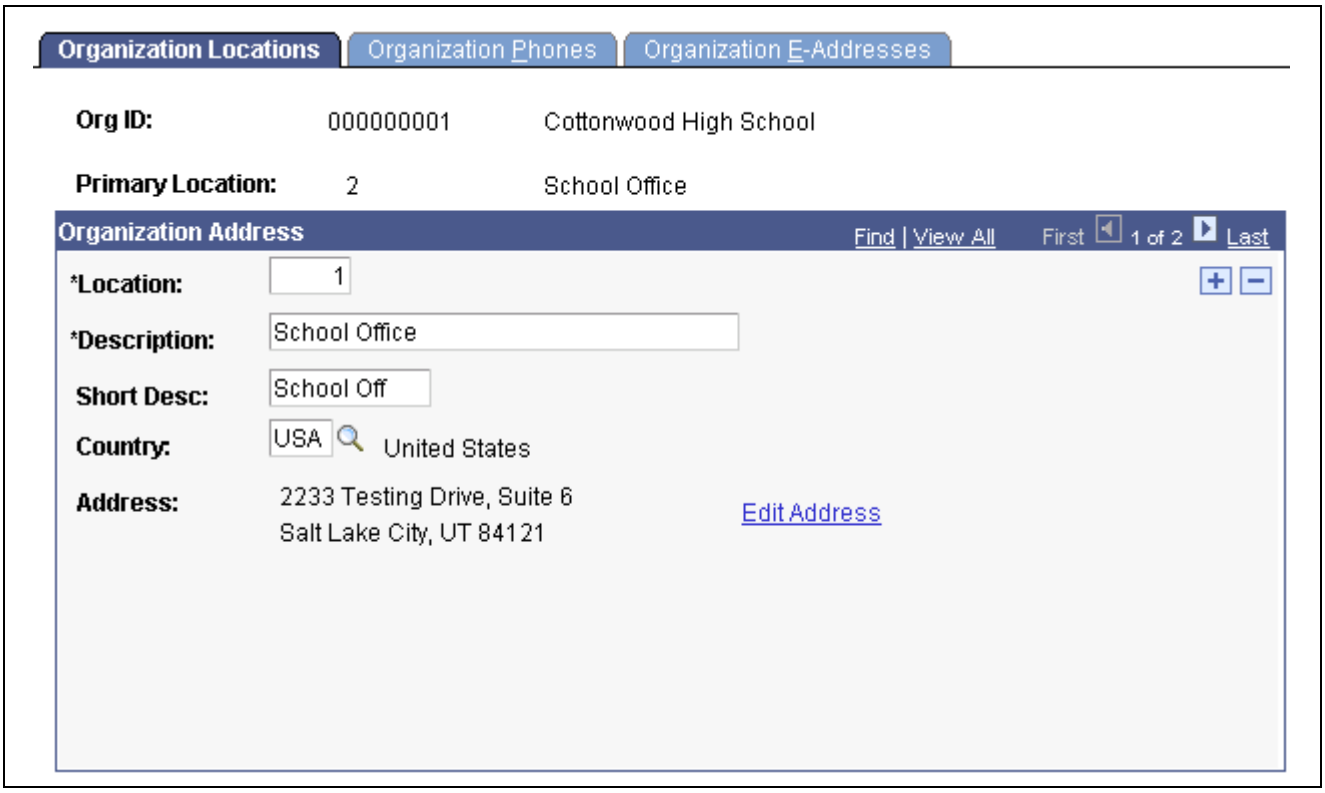
- Identify the organization locations.
- Identify the organization phone data.
- Identify the organization email data.

Pages Used to Enter Organization Location Data

Page Name	Object Name	Navigation	Usage
Organization Locations	ORG_LOCATIONS	Campus Community, Organization, Create/Maintain Organizations, Organization Locations	Enter or review the physical or mailing addresses for an organization.
Organization Phones	ORG_PHONES	Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Organization Phones	Enter or review the phone numbers for each location of an organization.
Organization E-Addresses	ORG_E_ADDR	Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Organization E-Addresses	Enter or review the electronic addresses for each location of an organization.

Identifying the Organization Location

Access the Organization Locations page.



Organization Locations page

Location The number of this location in the list of locations for this organization.

The system automatically assigns the next sequential number to each location that you add. You can manually override these numbers to rearrange the order of the locations.

Country The country of this location. Labels in the address format for the specified country appear so that you can enter or review the address of this location.

Use Edit Address Click to access the Edit Address page, where you can add or edit a location address.

Identifying the Organization Phone Data

Access the Organization Phones page.

Organization Phones page

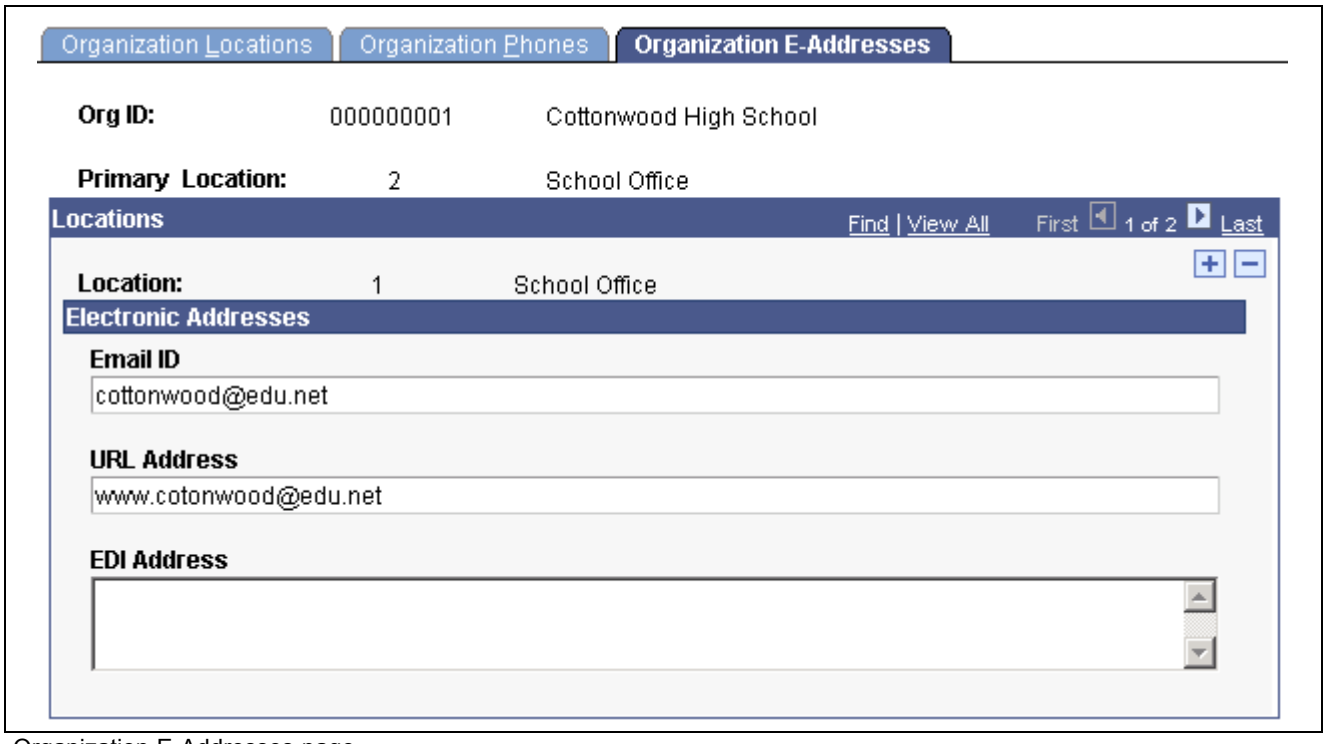
Type The type of phone number for this location.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Phone The telephone number for the specified type.

Identifying the Organization Email Data

Access the Organization E-Addresses page.



Organization E-Addresses page

Email ID Enter the email address for this location of the organization.

URL Address Enter the Uniform Resource Locator (URL) address of the World Wide Web page for this location of the organization.

EDI Address Enter the Electronic Data Interchange (EDI) address for this location of the organization.

Entering Organization Department Data

This section lists prerequisites and discusses how to:

- Identify an organization's departments.
- Identify the department location.
- Identify the department email data.

Prerequisites

Before entering or updating organization department data, you must enter the organization location data.

See Also

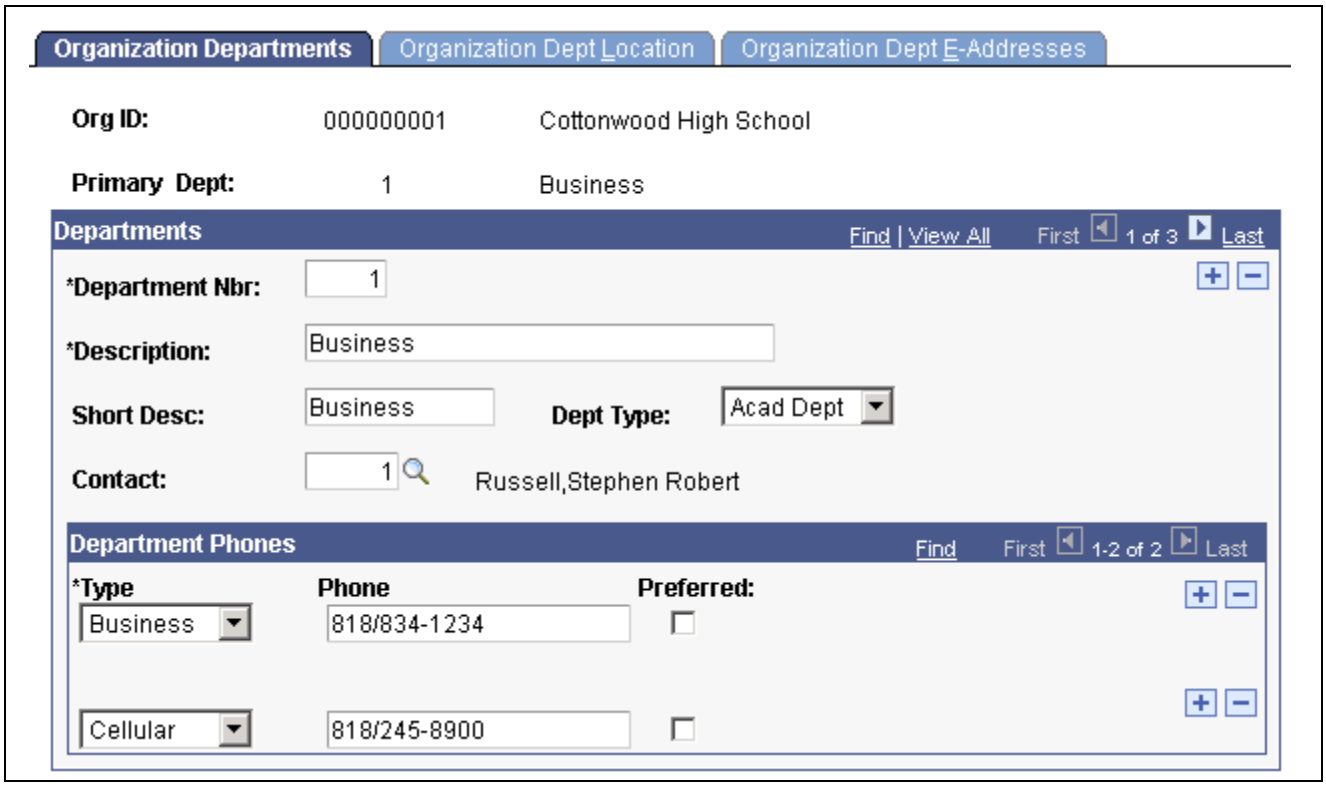
Chapter 35, "Managing Organization Data," Entering Organization Location Data, page 526

Pages Used to Enter Organization Department Data

Page Name	Object Name	Navigation	Usage
Organization Departments	ORG_DEPARTMENTS	Campus Community, Organization, Create/Maintain Organizations, Organization Departments	Enter or review the departments of an organization.
Organization Dept. Location	ORG_DEPT_LOC	Campus Community, Organization, Create/Maintain Organizations, Organization Departments, Organization Dept Location	Enter the location address for a department within an organization.
Organization Dept E-Addresses	ORG_DEPT_E_ADDR	Campus Community, Organization, Create/Maintain Organizations, Organization Departments, Organization Dept E-Addresses	Enter or review electronic addresses for a department within an organization, including email and URL addresses.

Identifying the Organization Departments

Access the Organization Departments page.



Organization Departments page

Department Number The number of this department in the list of departments for this organization.

The system automatically assigns the next sequential number to each department that you add. You can manually override these numbers to rearrange the order of the departments.

Department Type The type *(Academic* or *Administrative)* that describes this department.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Contact The main contact, from the Organization Contacts page, for this department.

Note. You cannot select a contact for this department until contacts are entered on the Organization Contacts page.

Type The type of phone number for this department.

Values for this field are delivered with the system as translate values. You can modify these translate values.

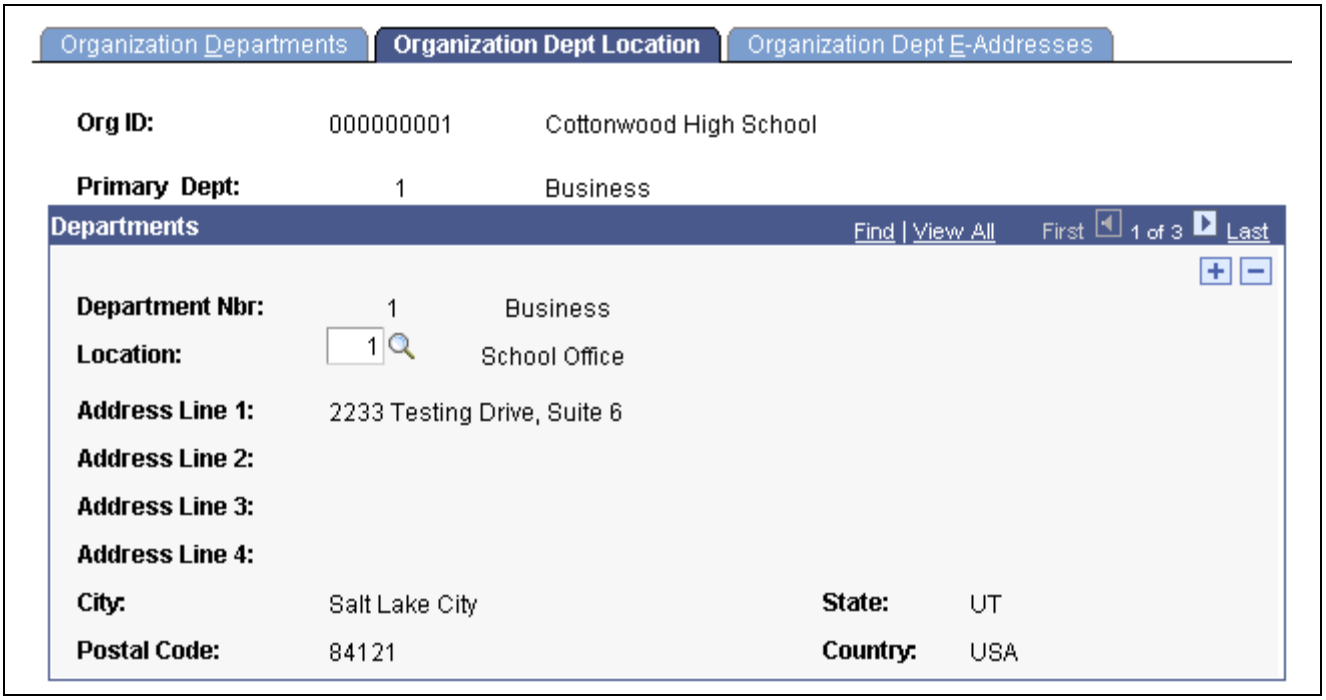
Phone The telephone number for the specified type for this department.

Preferred When selected, indicates that this phone number is the preferred or primary phone number for this department.

This number appears as the preferred phone number when this department is selected as the primary department on the Primary Contact and Department page.

Identifying the Department Location Data

Access the Organization Dept Location page.

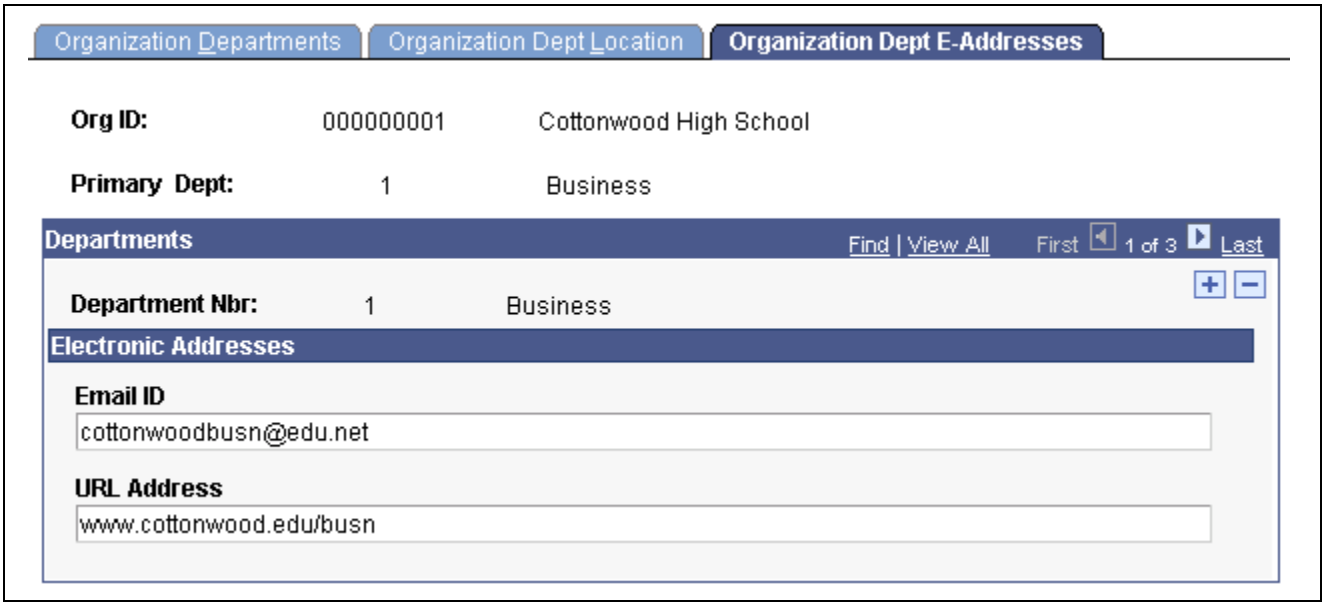


Organization Dept (department) Location page

Location The location number, from the Organization Locations page, for this department's location. The system displays the address associated with the location selected.

Identifying the Department Email Data

Access the Organization Dept E-Addresses page.



Organization Dept (department) E-Addresses page

Email ID The email address for this department of the organization.

URL Address The URL web address for this department of the organization.

Entering Organization Contact Data

This section lists prerequisites and discusses how to:

- Identify the organization's contacts.
- Identify the contact location.
- Identify the contact email data.

Prerequisites

Before entering or updating organization contact data, enter the organization department data.

See Also

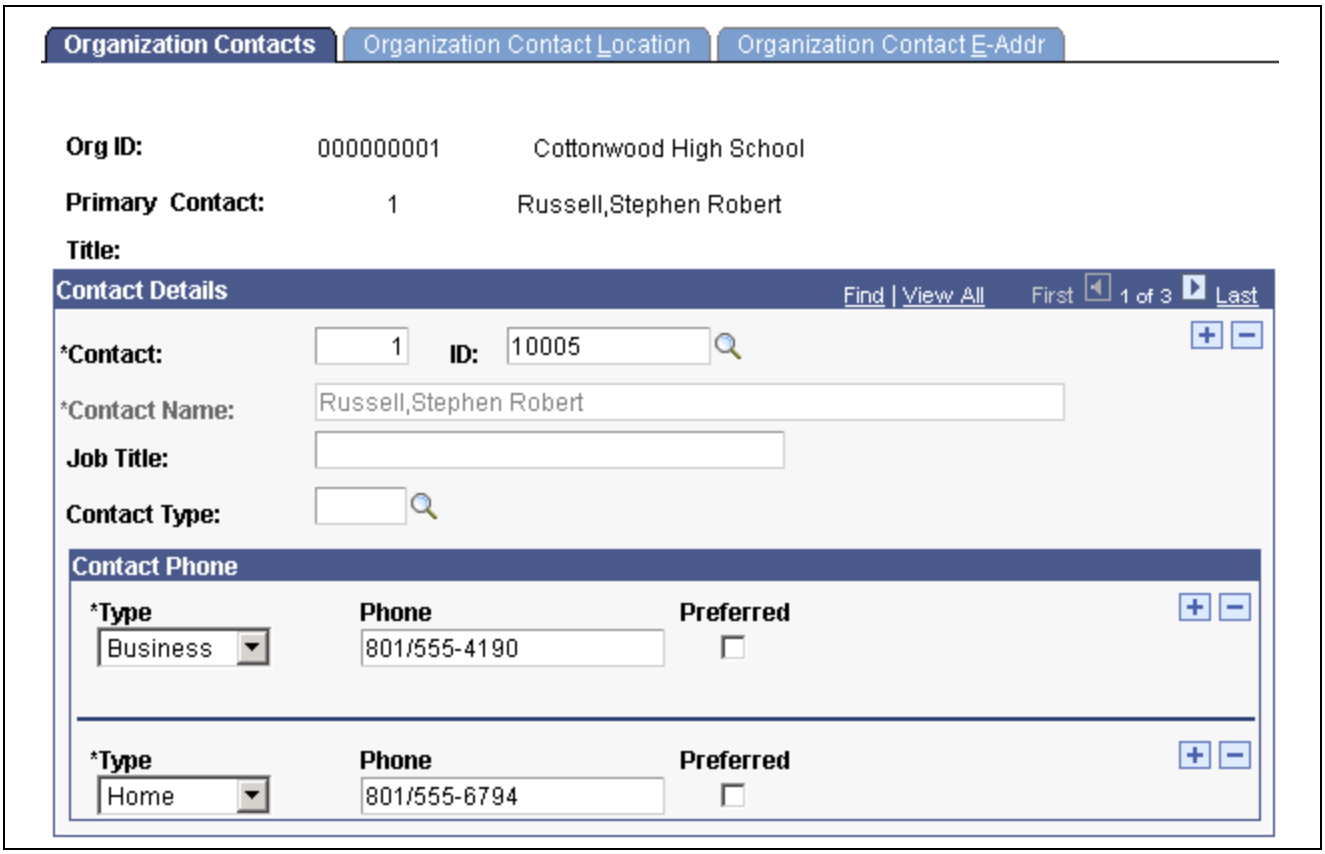
Chapter 35, "Managing Organization Data," Entering Organization Department Data, page 529

Pages Used to Enter Organization Contact Data

Page Name	Object Name	Navigation	Usage
Organization Contacts	ORG_CONTACTS	Campus Community, Organization, Create/Maintain Organizations, Organization Contacts	Enter or review contact information for an organization.
Organization Contact Location	ORG_CONTACTS_LOC	Campus Community, Organization, Create/Maintain Organizations, Organization Contacts, Organization Contact Location	Specify or review the location of an organization contact.
Organization Contact E-Addresses	ORG_CONTACT_E_ADDR	Campus Community, Organization, Create/Maintain Organizations, Organization Contacts, Organization Contact E-Addr	Enter or review electronic addresses for a contact person at an organization, including email and URL addresses.

Identifying the Organization's Contacts Data

Access the Organization Contacts page.



Organization Contacts page

Contact Details

Contact The number of this contact person in the list of contacts for this organization.

The system automatically assigns the next sequential number to each contact that you add. You can manually override these numbers to rearrange the order of the contacts.

ID The ID of this contact person, if the person exists in your database.

Contact Name The name of this contact person.

If the person is in your database, the system automatically displays the person's name when you select the ID. If the person is not in your database, you must enter the name manually.

Job Title This contact person's job title.

Contact Type The type of contact (for example, *Teacher, Principal, Guidance Counselor,* or *Primary Contact*) from the Contact Type Table page.

Contact Phone

Type The type of phone number for this contact.

Values for this field are delivered with the system as translate values. You can modify these translate values.

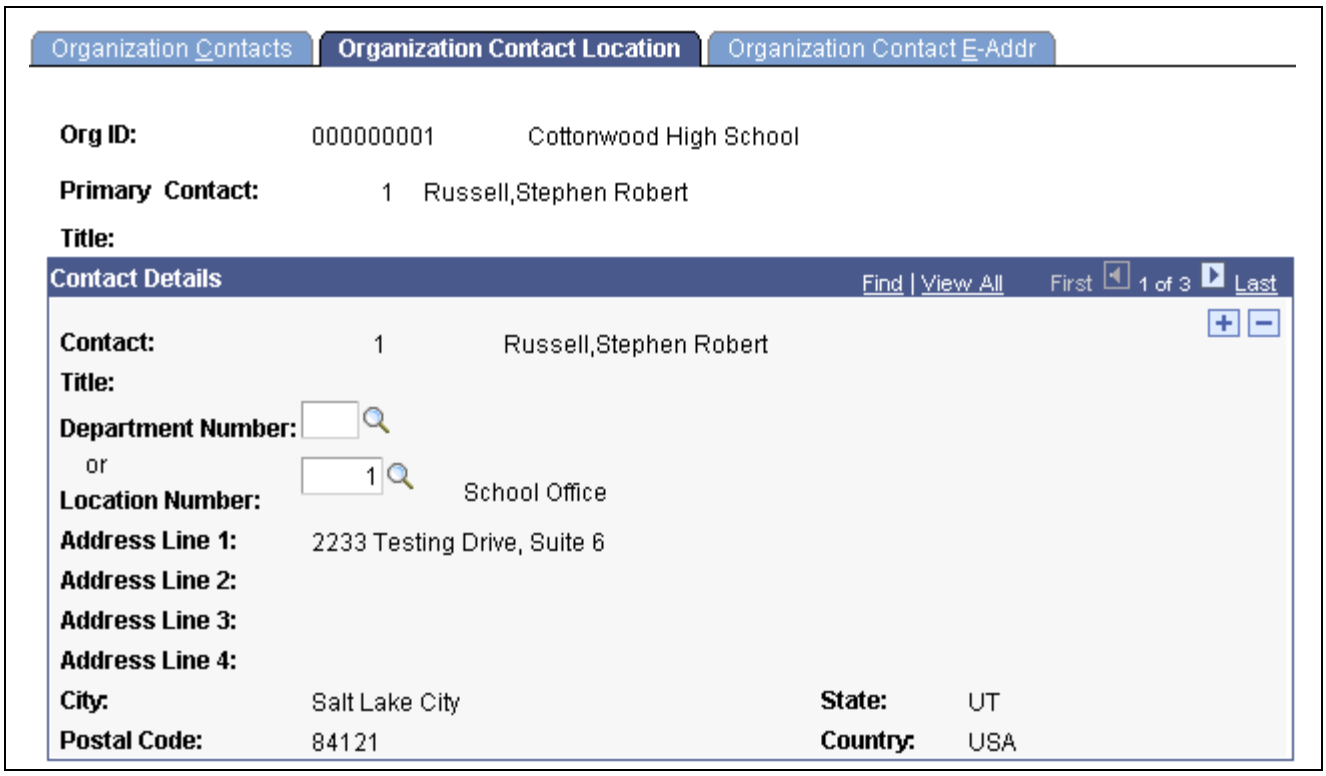
Phone The telephone number for the specified type for this contact.

Preferred When selected, indicates that this phone number is the preferred or primary phone number for this contact person.

This number appears for this person if he or she is selected as the primary contact on the Primary Contact and Department page.

Identifying the Contact Location

Access the Organization Contact Location page.



Organization Contact Location page

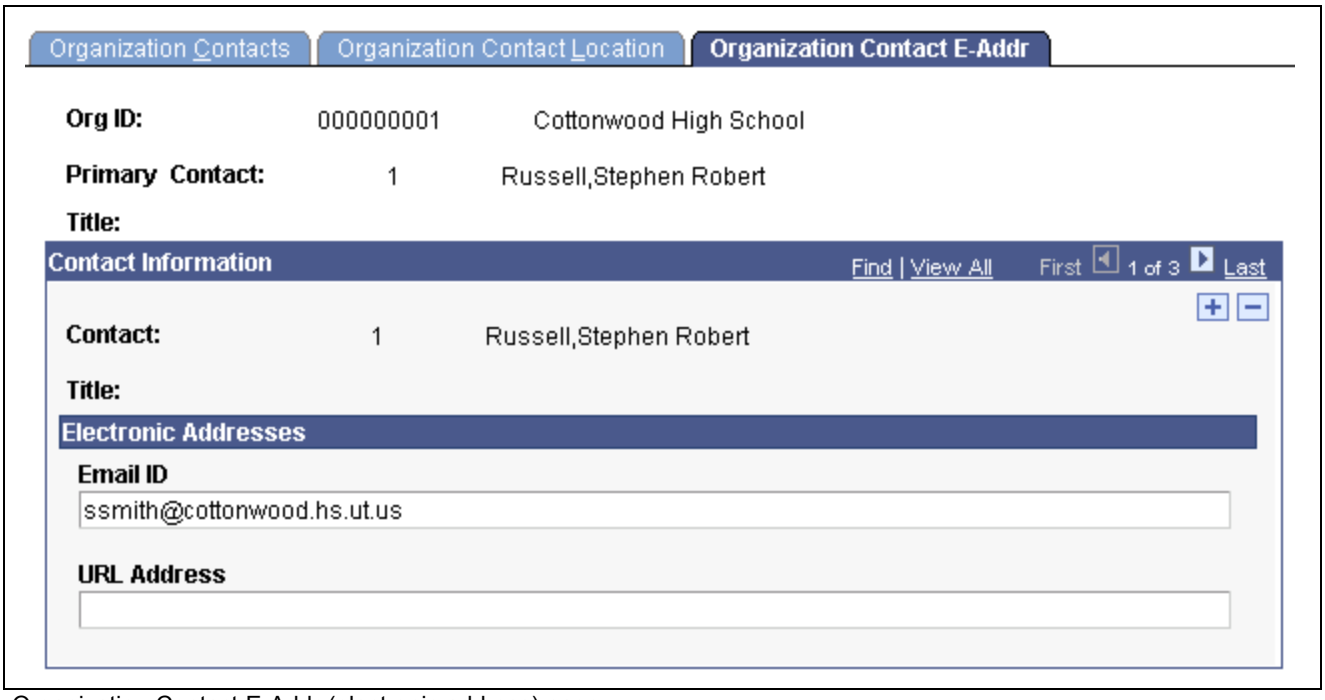
You can enter either the department number or the location number.

Department Number The department number, from the Organization Departments page, for this contact's department. The system displays the address associated with the department selected.

Location Number The location number, from the Organization Locations page, for this contact's location. The system displays the address associated with the location selected.

Identifying the Contact Email Data

Access the Organization Contact E-Addr page.



Organization Contact E-Addr (electronic address) page

Electronic Addresses

Email ID Enter the email address for this contact person.

URL Address Enter the URL web address for this contact person.

Reviewing Organization Data

This section discusses how to:

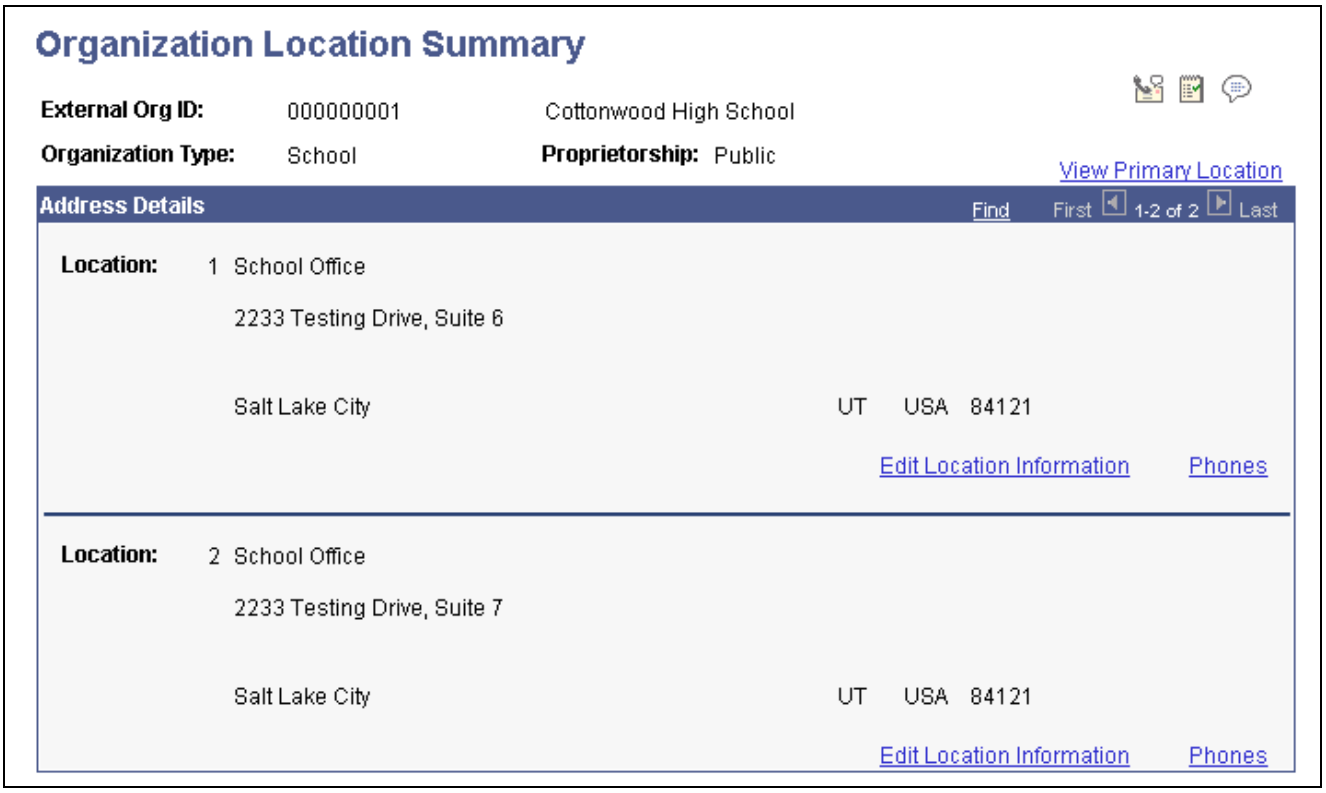
- View locations data.
- View primary location data.
- View school data.
- View phones data.
- View departments data.
- View department location data.
- View department phone data.
- View contacts data.
- View contact phone data.
- View contact location data.
- View organizations by group types.

Pages Used to Review Organization Data

Page Name	Object Name	Navigation	Usage
Organization Location Summary	EXT_ORG_LOC_SUM	Campus Community, Organization, Review Organizations, Organization Location Summary	Review all of the locations for an organization.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the View Primary Location link on the Organization Location Summary page.	View data for the primary location for an organization.
Organization School Information	SCHOOL_INFO	Click the School Information link on the Organization Primary Location page.	View the school characteristics of an organization location.
Organization Phone Information	EXT_ORG_LOC_PHN	Click the Phones link on the Organization Location Summary page.	View phone an electronic address information for an organization location.
Organization Locations	ORG_LOCATIONS	Click the Edit Location Information link on the Organization Location Summary page.	View or edit location information for an organization location.
Organization Dept. Summary	EXT_ORG_DEPT_SUM	Campus Community, Organization, Review Organizations, Organization Dept. Summary	Review the departments for a specific organization.
Department Location Information	EXT_ORG_DEPT_LOC	Click the Location link on the Organization Dept. Summary page.	View the location information for a department at an organization.
Department Phone Information	EXT_ORG_DEPT_PHN	Click the Phone link on the Organization Department Summary page.	Review the telephone numbers for a department at an organization.
Organization Contacts Summary	EXT_ORG_CNTCT_SUMM	Campus Community, Organization, Review Organizations, Organization Contacts Summary	Review the contacts for a specific organization.
Contact Phone Information	EXT_ORG_CNTCT_PHN	Click the Phone link on the Organization Contact Summary page.	Review email address and telephone numbers for an organization contact.
Contact Location Information	EXT_ORG_CNTCT_LOC	Click the Location link on the Organization Contact Summary page.	Review location information for a contact at an organization.
Organization Groups Summary	ORG_GROUP_SUMM	Campus Community, Organization, Review Organizations, Organization Groups Summary	Review all organizations by group.

Viewing Locations Data

Access the Organization Location Summary page.



Organization Location Summary page

The Organization Location Summary page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Locations page.

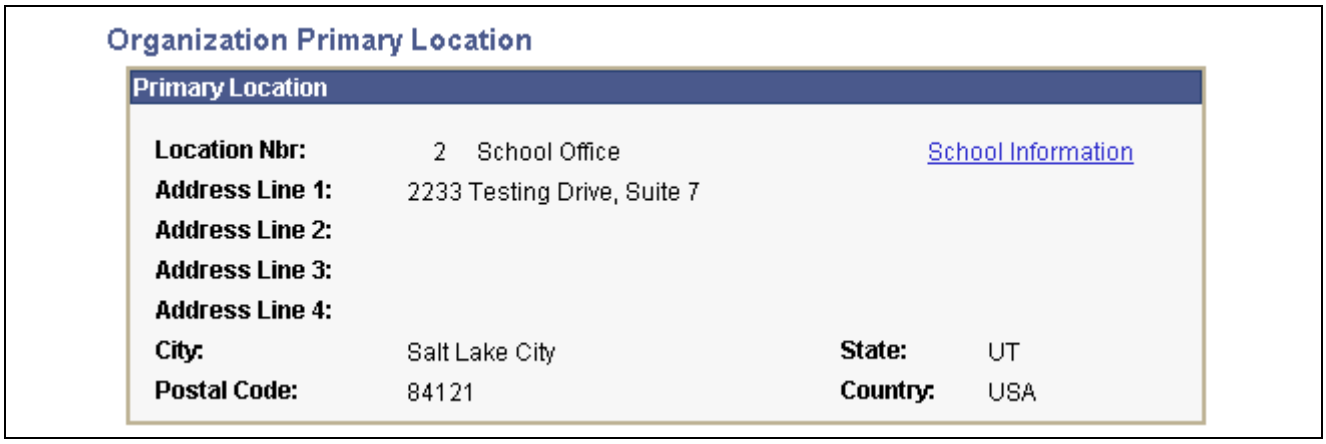
View Primary Location Click to access the Organizations Primary Location page, where you can view data for the primary location for this organization.

Edit Location Information Click to access the Organization Location page, where you can edit or update data for this organization location.

Phones Click to access the Organization Phone Information page, where you can view phone and electronic address information for this organization location.

Viewing Primary Location Data

Access the Organization Primary Location page.



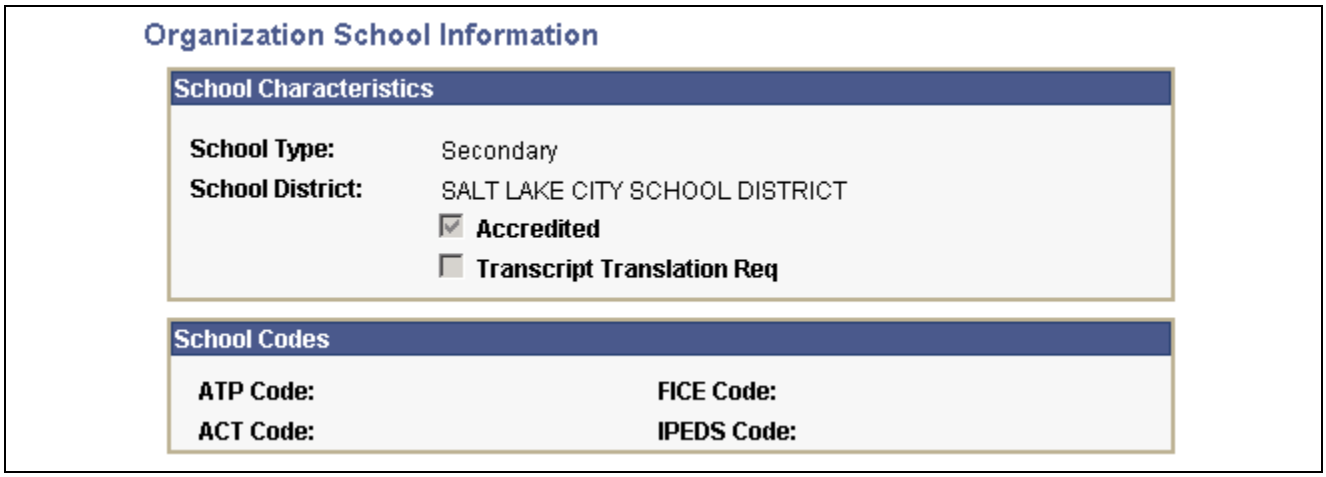
Organization Primary Location page

The Organization Primary Location page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Locations page.

School Information Click to access the Organization School Information page, where you can view the school characteristics for this organization location.

Viewing School Data

Access the Organization School Information page.

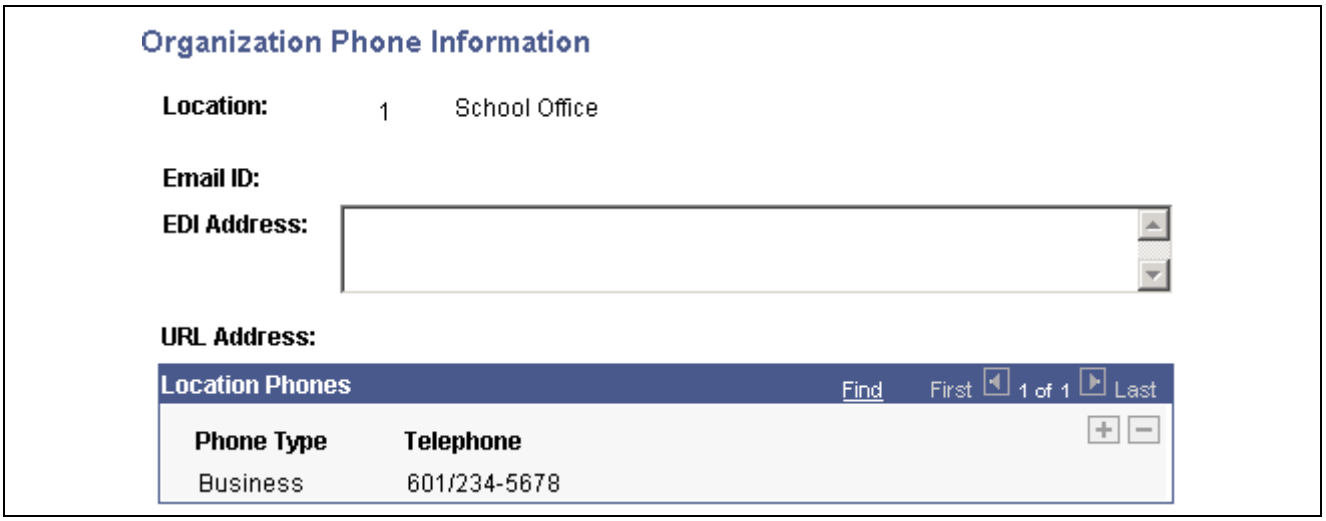


Organization School Information page

The Organization School Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the School Data page.

Viewing Phones Data

Access the Organization Phone Information page.

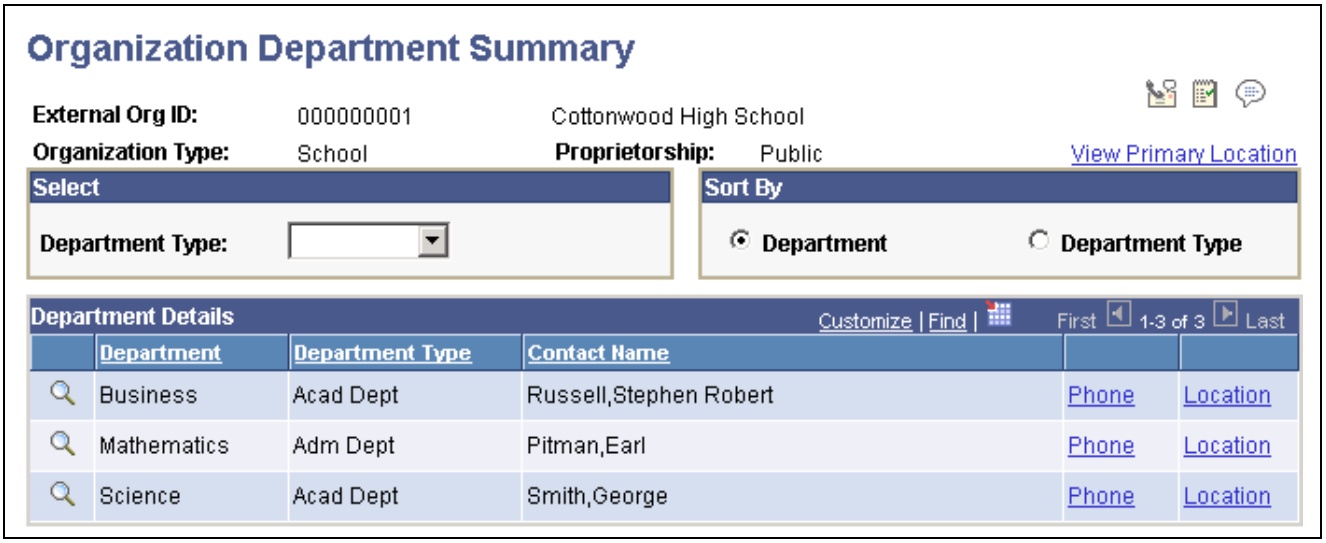


Organization Phone Information page

The Organization Phone Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the phones and email pages in the Organization Locations component.

Viewing Departments Data

Access the Organization Department Summary page.



Organization Department Summary page

View Primary Location Click to access the Organization Primary Location page, where you can view data for the primary location for this organization.

Select

Department Type The type of departments *(Academic* or *Administrative)* that you want to review. If you do not specify a department type, the system lists all the departments for this organization.

Sort By

Department When selected, indicates that the system should sort the list of departments alphabetically by department.

Department Type When selected, indicates that the system should sort the list of departments by department type.

Department Details

(edit department) Click to access the Organization Departments page, where you can edit or update data for this organization department.

Phones Click to access the Department Phone Information page, where you can view phone and electronic address information this organization department.

Location Click to access the Department Location Information page, where you can view the location data for this department.

Viewing Department Location Data

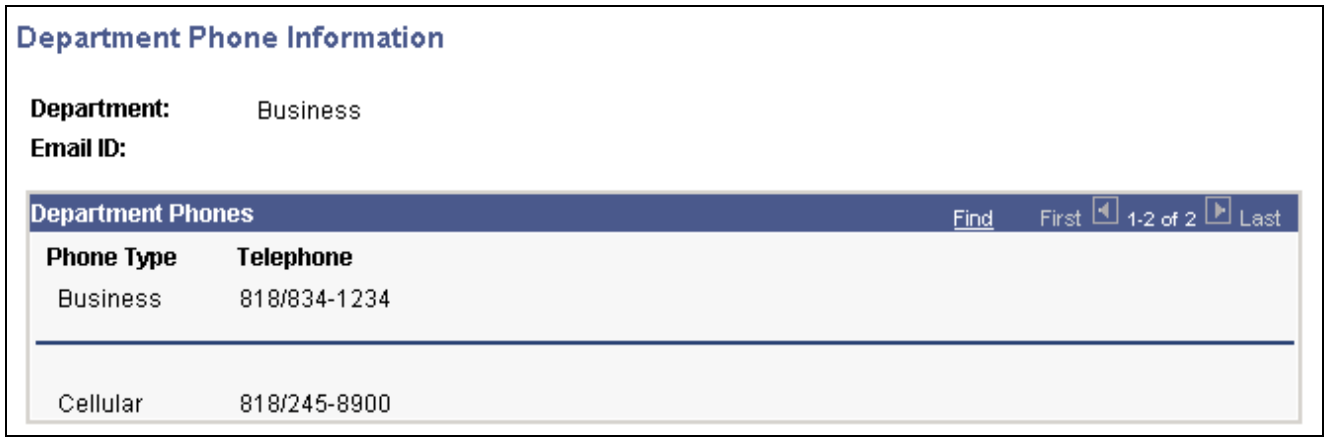
Access the Department Location Information page.

Department Location Information page

The Department Location Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Departments component.

Viewing Department Phone Data

Access the Department Phone Information page.

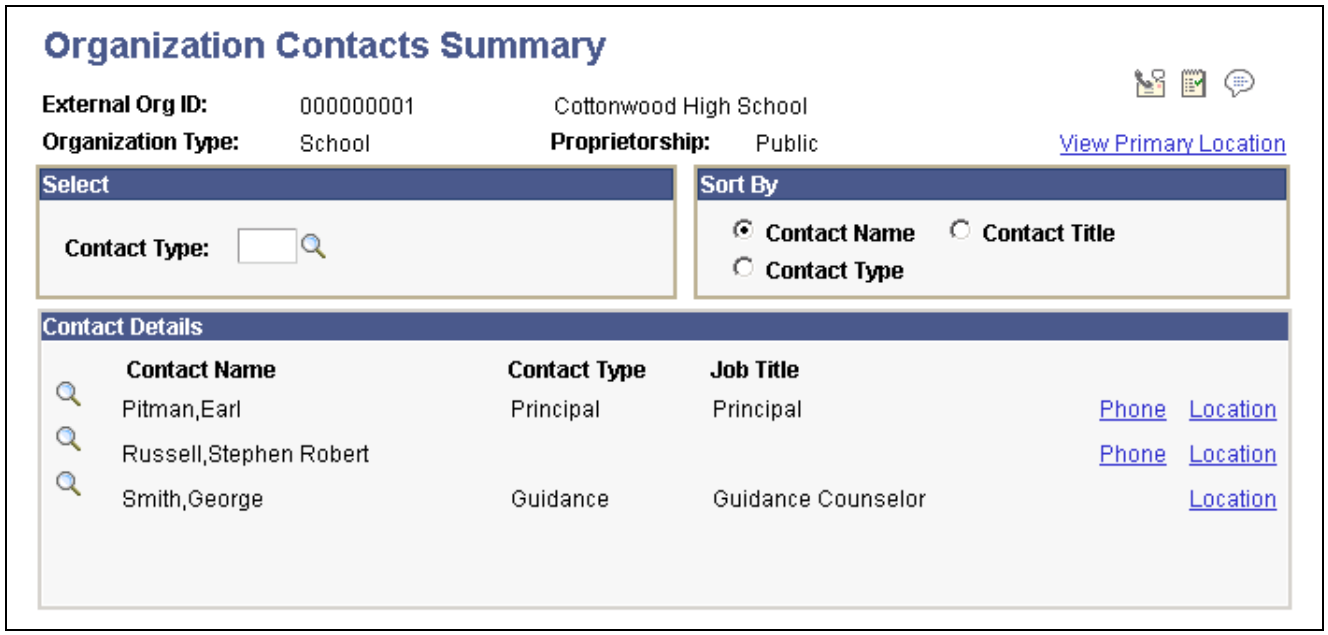


Department Phone Information page

The Department Phone Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Departments component.

Viewing Contacts Data

Access the Organization Contacts Summary page.



Organization Contacts Summary page

View Primary Location Click to access the Organization Primary Location page, where you can view data for the primary location for this organization.

Select

Contact Type The type of contact to review (for example, *Teacher, Guidance Counselor,* or *Principal*). If you do not specify a contact type, the system lists all the contacts for this organization.

Sort By

Contact Name When selected, indicates that the system sorts the list of contacts alphabetically by name.

Contact Type When selected, indicates that the system sorts the list of contacts by contact type.

Contact Title When selected, indicates that the system sorts the list of contacts by job title.

Contact Details

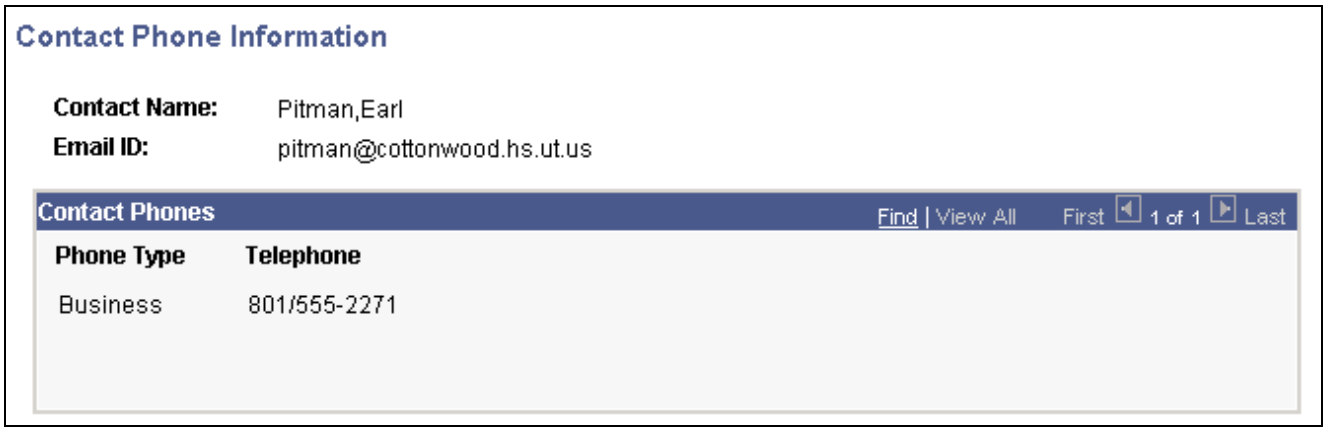
(edit contact) Click to access the Organization Contacts page, where you can edit or update data for this organization contact.

Phones Click to access the Contact Phone Information page, where you can view phone and electronic address information this organization contact.

Location Click to access the Contact Location Information page, where you can view the location data for this contact.

Viewing Contact Phone Data

Access the Contact Phone Information page.

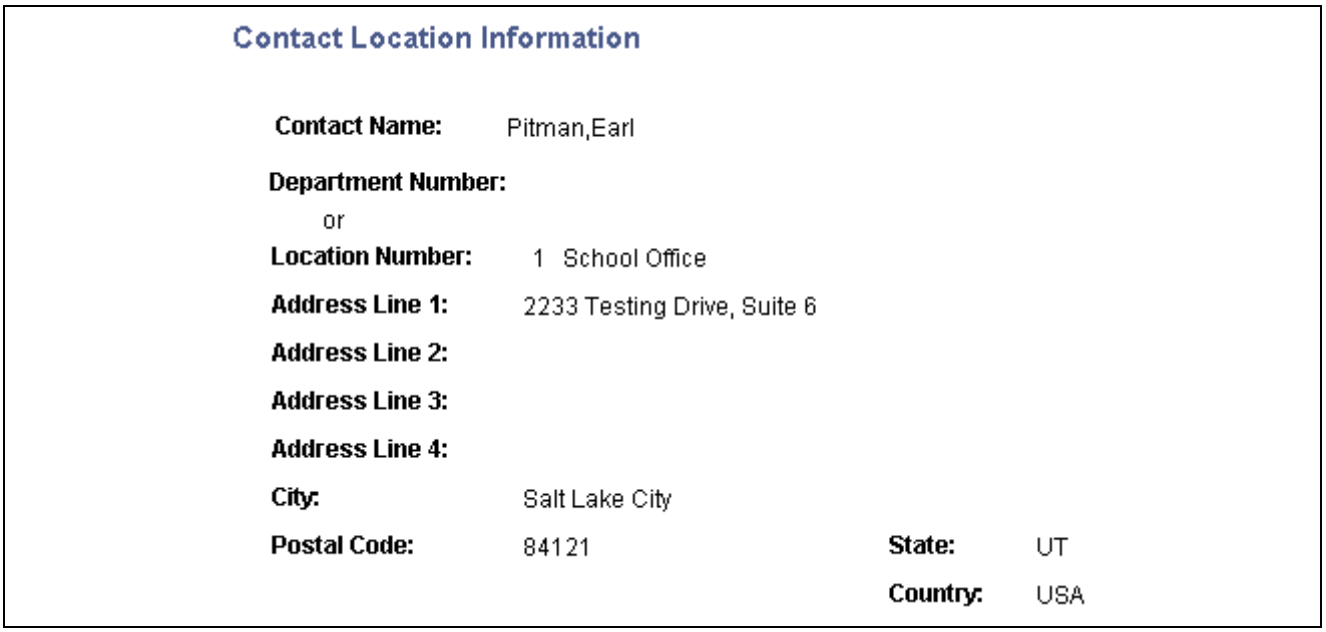


Contact Phone Information page

The Contact Phone Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Contacts component.

Viewing Contact Location Data

Access the Contact Location Information page.

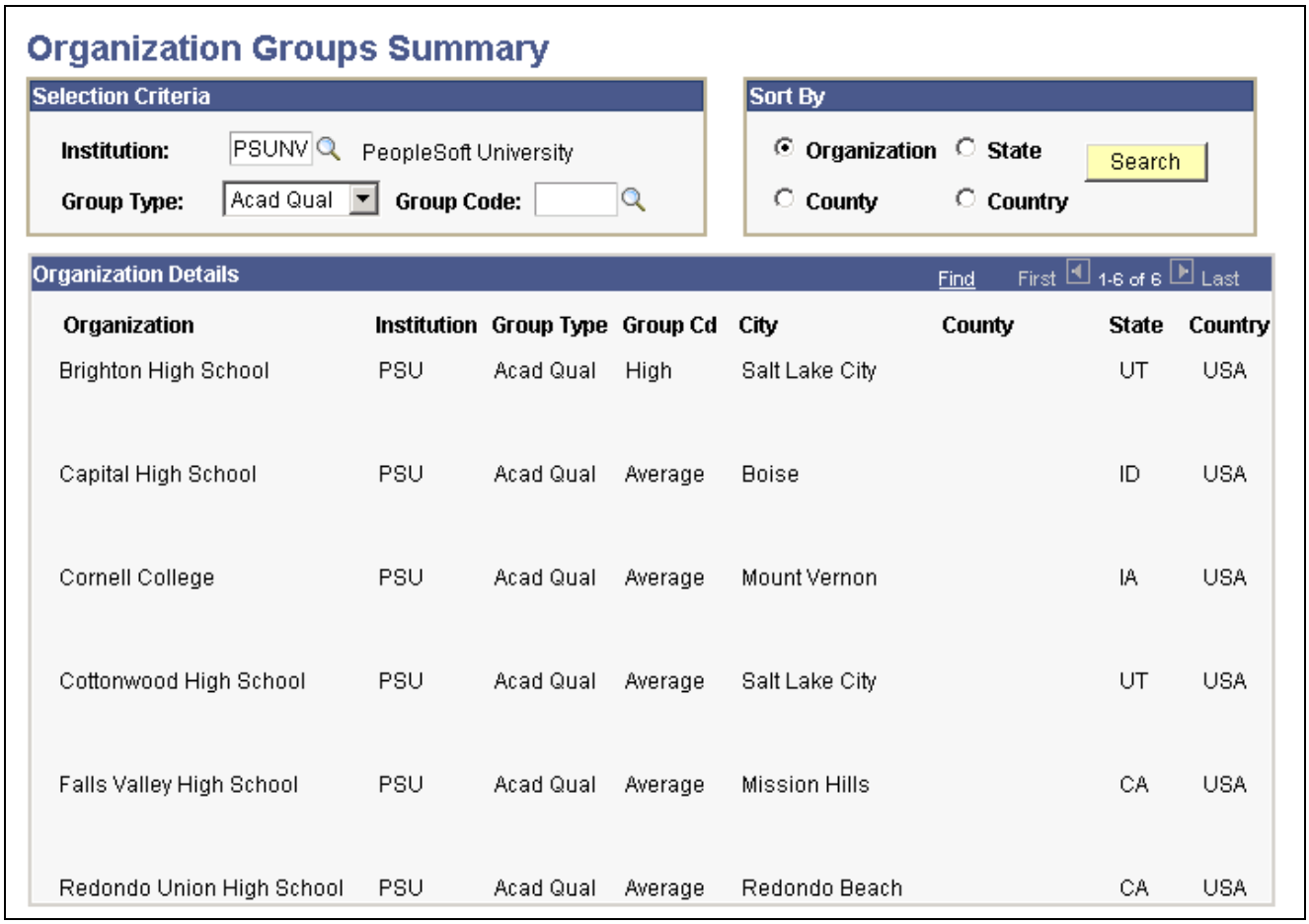


Contact Location Information page

The Contact Location Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Organization Contacts component.

Viewing Organizations by Group Types

Access the Organization Groups Summary page.



Organization Groups Summary page

Selection Criteria

Institution The institution associated with the organizations to review.

Group Type The type of group *(Academic Quality, Feeder,* or *Magnet),* from the Organization Affiliation page, to review.

Note. Because the purpose of this page is to enable you to review a summary of organizations by group, you *must* specify a Group Type value.

Group Code The group code, from within the group type, to review.

Sort By

Search Click to launch the search based on the selected criteria.

Managing Organization IDs

You can define priority control records to prevent the deletion of organization IDs. You can also change an organization's ID from the system-generated ID to another ID.

See Also

Chapter 3, “Setting Up ID Delete Control,” page 31

Chapter 19, “Managing IDs,” page 171

Entering Codes for External Organizations

This section provides an overview of external organization codes, lists prerequisites, and discusses how to assign codes to external organizations.

Understanding External Organization Codes

You can enter and track external codes for organizations. You can load third-party external codes into your system, for example EPS or ATP codes, and view the results of the automated assignment process on the Organization External Codes page.

See Also

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, “Loading and Assigning EPS Market Codes”

Chapter 36, “Loading External Organization Data,” page 547

Prerequisites

Before assigning codes to external organizations, set up the code types from which to select.

See Also

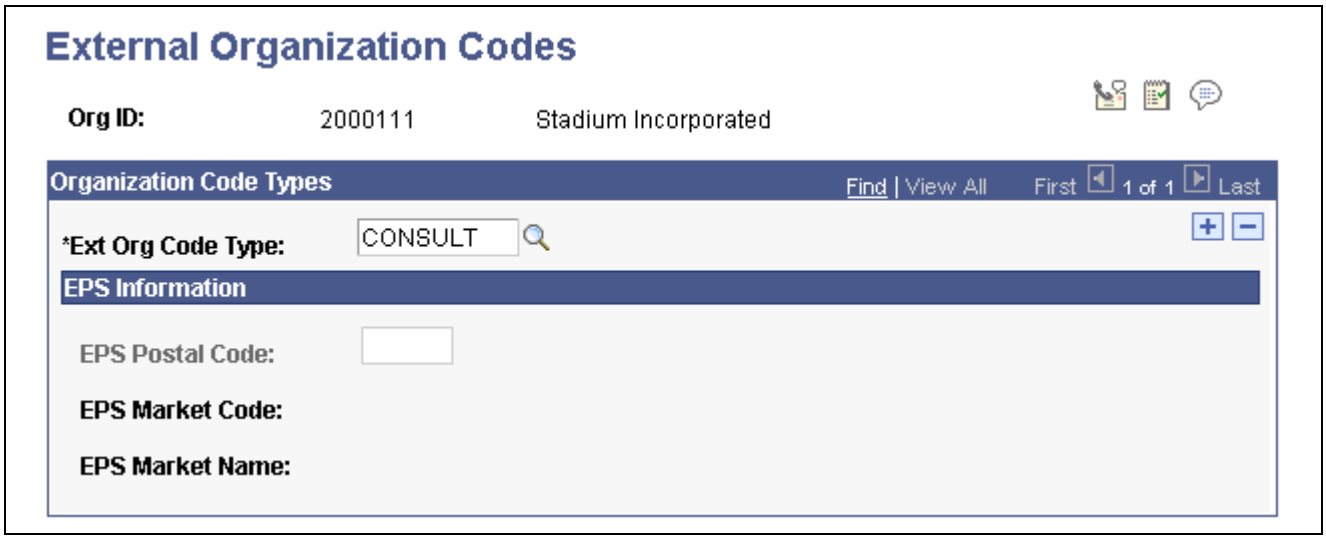
Chapter 12, “Setting Up Organization Data,” Loading or Defining External Codes for Organization Types, page 117

Pages Used to Enter Codes for External Organizations

Page Name	Object Name	Navigation	Usage
External Organization Codes	EXT_ORG_CODES	Campus Community, Organization, Create/Maintain Organizations, External Organization Codes	Assign or review codes for external organizations.

Assigning Codes to External Organizations

Access the External Organization Codes page.



External Organization Codes page

Organization Code Types

Ext Org Code Type (external organization code type) The code, from the External Organization Code Table page, that applies to this organization.

EPS Information

EPS Postal Code If the code type is set as an EPS code on the External Organization Code Table page, the EPS Postal Code field is available.

If EPS codes are loaded into your system, you can select from the EPS postal codes for this organization.

EPS Market Code The system displays the EPS market code based on the EPS postal code.

EPS Market Name The system displays the EPS market name based on the EPS postal code.

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CHAPTER 36

Loading External Organization Data

This chapter provides an overview of loading external organization data and discusses how to:

- Load external ATP data.
- Load external EPS market code data.

Understanding External Data Load

When you load data from an external source, you load it into a suspense table. You can then review the data in the suspense table and modify it. To load data into the suspense table, position the source file or tape, specify the location of the source, and run the appropriate load external data process.

PeopleSoft Process Scheduler runs the process and stores the data in the suspense tables. When it is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. Use this number to review the data on the appropriate Suspense Process Options page.

Loading External ATP Data

This section provides an overview of loading ATP data and discusses how to:

- Specify the data source.
- Review suspense process options data.
- Review school address data.
- Review other school data.
- Review all ATP messages.
- Specify search parameters.
- Search for duplicate records and post the data.
- Purge ATP data from the suspense file.

Understanding ATP Data Load

When you schedule the process, PeopleSoft Process Scheduler runs the CCATPLOD.SQR process and stores the ATP data in the ATP suspense tables. When the process is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. You can review the loaded data on the ATP Suspense Process Options page.

The ATP suspense tables hold records not yet posted to the organization tables. School data from these tables migrates to your database during the posting process based on the options that you select on the ATP Search Parameters and ATP Post Parameters pages.

You can review data in the ATP suspense table at any time during the ATP external data load process. You might want to look at the data immediately after loading it, after performing a search/match on it, or after posting it. You can determine if a record is yet to be processed, if a record was added to your database, and if any errors were encountered during the search/match or loading processes.

Note. If you have not yet posted the data, you can edit it on the ATP Suspense Table page. When editing data in the suspense tables, you must be careful not to create duplicate records that are added to the database during posting.

You may choose to correct errors on the appropriate pages before running the post process. When you make changes to fields in this component, click Save; the other fields are updated according to the revisions you made. For example, if the Edit field displayed *Error,* when you fix the errors in the file and save it, the program updates the Edit field to *Complete.*

You should always click Save before changing any of the processing options so that you can review the results of any data changes you made.

After loading the ATP data into a suspense table, run the ATP Search/Match process to check for duplicate matching records before posting the data. Each record in the ATP load contains a change code value—*Add, Change,* or *Delete*—that instructs the system to add the record as new or to change or delete the existing one. The Search/Match process investigates the database to identify conflicts between existing data and the data loaded for posting, and between existing data and the action required by the change code. You must decide what you want the system to do in the case of conflicts.

For example, if the change code is *Add,* and the system finds an existing record that matches the load data, the system does not update the existing data and add it for posting; you must decide whether the system should update the existing data, place that load data in suspense until you can investigate it further, or ignore and skip over it. You must also decide what the system should do if the change code is *Change* or *Delete* and it finds no matching record to change or delete.

After loading the ATP external data into the suspense table and selecting the parameters for the Search/Match process, run the CCATPPST.SQR process to post the data. You can process and post a single record or all records in the suspense table.

You can remove records from a ATP suspense table by running the ATP Purge Suspense File process.

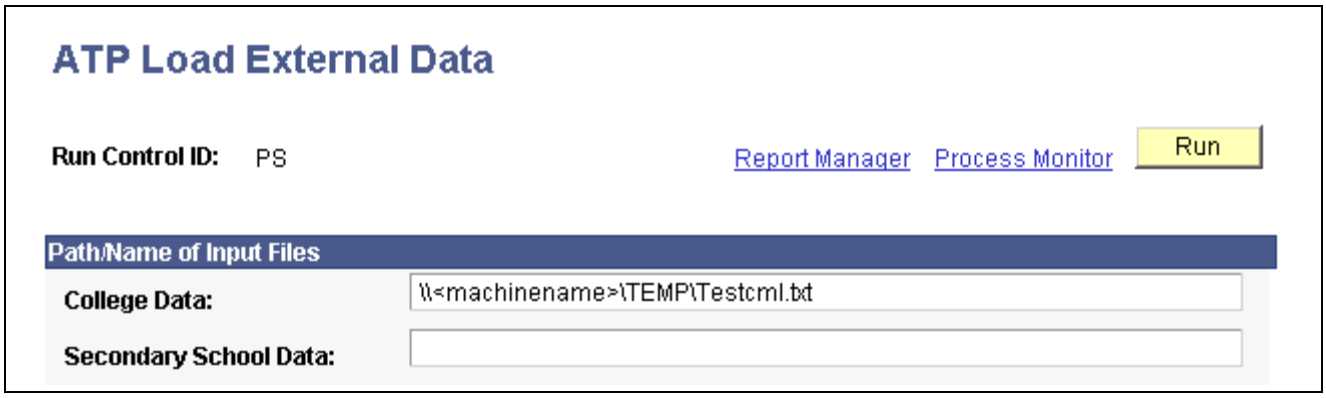
The PeopleSoft Process Scheduler runs the CCATPPRG.SQR process and purges the designated records from the ATP suspense file. When it is finished, the organizations whose data was loaded are added to the database and organization IDs are assigned to them.

Pages Used to Load External ATP Data

Page Name	Object Name	Navigation	Usage
ATP Load External Data	ATP_LOAD_PARMS	Campus Community, Organization, Organizations Data Load, ATP Load External Data	Specify the source from which the load process should get the ATP data.
ATP Suspense Process Options	ATP_SUSP_PROC_OPTN	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Process Options	Review and edit the status of data in the ATP Suspense Table.
ATP Suspense Address Data	ATP_SUSP_ADDRESS	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Address Data	Review address information loaded for a specific school.
ATP Suspense Data	ATP_SUSP_DATA	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Data	Review data other than address data for the school record loaded.
ATP Messages	ATP_SUSP_MESSAGE	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Messages	Review and resolve ATP suspense messages.
ATP Messages	ATP_MESSAG_TABLE	Campus Community, Organization, Organizations Data Load, ATP Messages	Review any of the ATP data messages in your system.
ATP Search Parameters	ATP_SEARCH_PARMS	Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Search Parameters	Select search parameters to identify duplicate matching records before posting the data.
ATP Post Parameters	ATP_POST_PARMS	Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Post Parameters	Select parameters for posting the data.
ATP Purge Suspense File	ATP_PURGE_PARMS	Campus Community, Organization, Organizations Data Load, ATP Purge Suspense File	Purge data from the ATP Suspense Table.

Specifying the Data Source

Access the ATP Load External Data page.



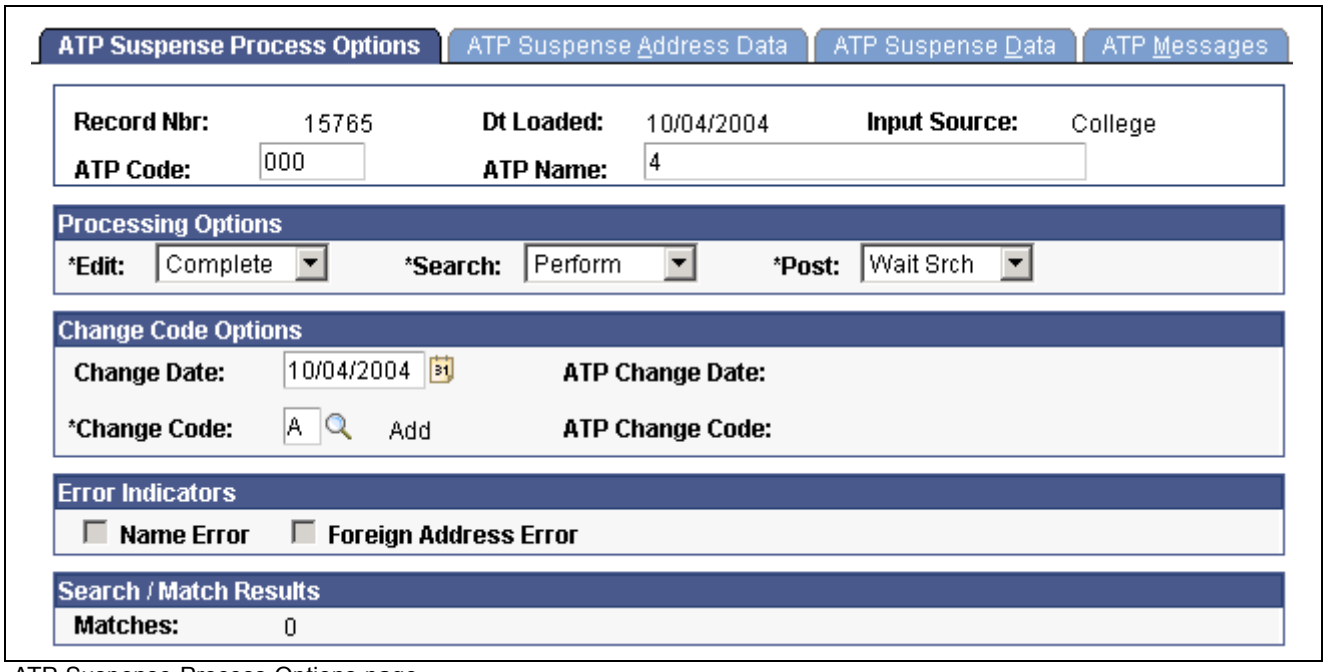
ATP Load External Data page

College Data If the ATP data is college data, specify the correct path to the input file here.

Secondary School Data If the ATP data is secondary school data, specify the correct path to the input file here.

Reviewing Suspense Process Options Data

Access the ATP Suspense Process Options page.



ATP Suspense Process Options page

The top portion of this page displays information about the ATP record: the ATP record number, date loaded, input source, ATP code, and ATP name. You can override the ATP code and ATP name if necessary.

Processing Options

Values for the Edit, Search, and Post fields are delivered preset with the system.

Warning! You can manually edit the values in the Edit, Search, and Post fields; however, if any of these fields shows a status of *Error* and you manually change the status without correcting the error, you might have problems when posting the data.

Edit

The status of the record as the result of the load external data process.

Complete: The program was able to process this record without a problem.

Error: The program encountered problems when processing this record.

Perform: This value is only set manually and is for informational purposes.

Search

The status of the record as the result of the Search/Match process:

Complete: The Search/Match process ran without errors.

Error: The Search/Match process ran and errors were detected in this record.

Perform: The Search/Match process was not yet run for this record or the Search/Match process is set so that the record will be re-selected.

Post

The status of the record as the result of the post process. These values can be entered manually; however, some are entered by the system after processes are run, as described below:

Delete ID: The system encountered an indication that the organization was deleted from the tape.

Set by the system during the Search/Match process if it is unable to add data to a deleted organization. Can also be set manually.

Error: The Post process encountered a problem.

Set by the system during the Post process.

New ID Add: The system was unable to find a match in the database and will add a record with a new ID when the Post process is run, provided that the system finds no matches and an ATP change code of *Add.*

Set by the system during the Search/Match process if no match is found and a new one is added.

No Action: This value is only added manually. It is not automatically entered by the system. If this value is entered, the Post and Purge processes ignore the record. Set manually.

Purge: This value indicates that this suspense record is removed from the system during the Purge process.

Set by the system during the Post process if the record is successfully processed.

Update ID: The system found a matching ID in the database. This existing ID record is updated with the data from this ATP record during the Post process.

Set by the system during the Search/Match process if a match is found in the database.

Wait Search: This record is in the Suspense Table and is waiting to be processed by the Search/Match process.

Set by the system during the ATP Load External Data process.

Error Indicators

When the *Error* indicator appears in the Edit field in the Processing Options group box, the Error Indicators group box identifies the type of error.

Note. Correct errors on the appropriate page before running the Post process. When you make and save the correction, the system updates the Processing Options group box fields accordingly. For example, if the Edit field value is *Error* and you fix the errors in the file so that the system now recognizes the data, when you save the change, the system changes the Edit field to *Complete.* You should always save before changing any of the processing options so that you can review the results of any data changes.

Name Error When selected, indicates that the system could not recognize the name data.

Foreign Address Error When selected, indicates that the system could not recognize the address data or that the country of the address is not in the database.

Change Code Options

Change Date The system automatically displays the date when the ATP Load External Data process ran. You can change this date if necessary.

Change Code Instructs the system what to do with the record loaded by the ATP Load External Data process. The system automatically displays the value of *Add* for each record loaded by the process.

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

Add: Add the record loaded by the ATP Load process to the database as a new record.

Change: Change the existing record to reflect the record loaded by the ATP Load process.

Delete: Delete the record loaded by the ATP Load process.

See Chapter 36, "Loading External Organization Data," Loading External ATP Data, page 547.

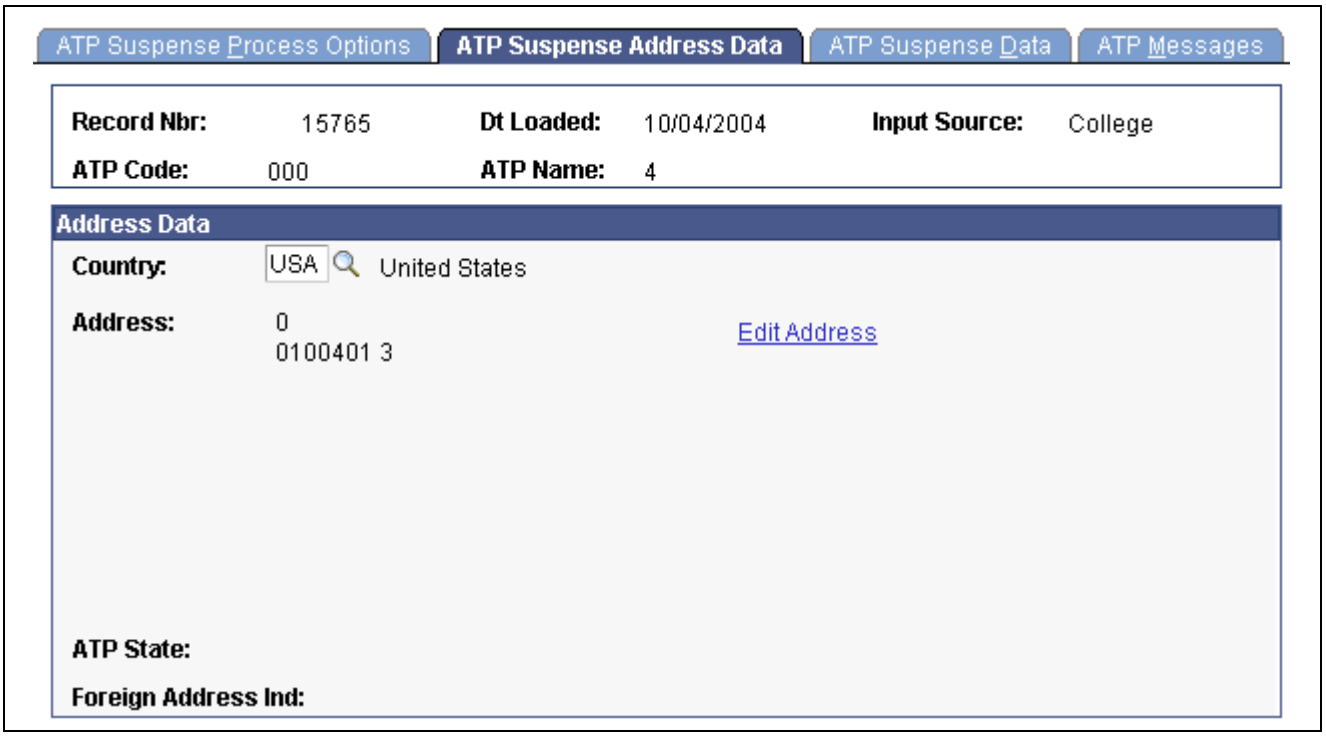
Search/Match Results

Matches The number of matches that the Search/Match process found for this organization.

Note. You can view additional information about errors and other processing actions on the ATP Messages page.

Reviewing School Address Data

Access the ATP Suspense Address Data page.

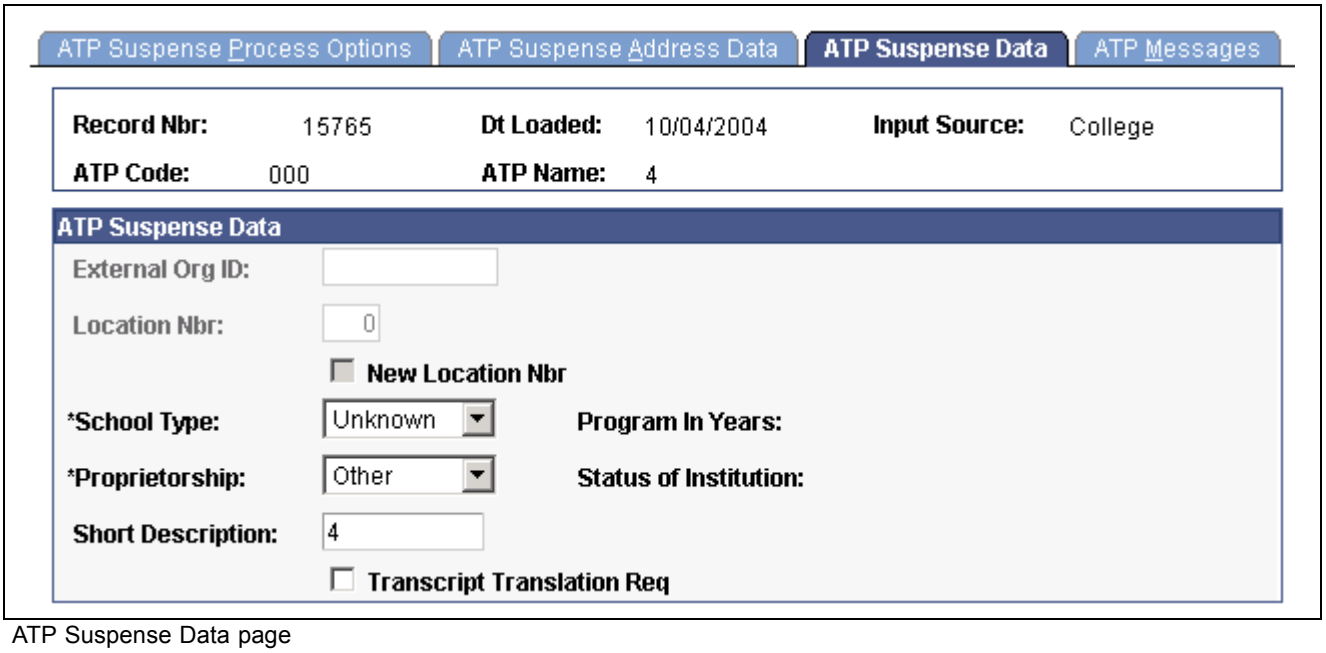


ATP Suspense Address Data page

The external data load provides the information on this page. You can change the address information if necessary.

Reviewing Other School Data

Access the ATP Suspense Data page.



ATP Suspense Data page

External Organization ID The system displays the existing ID of the organization or, if none exists, assigns the next available new ID when you save.

Location Number The address location number of this organization. The default location number when adding a new organization is one.

New Location Number When selected, indicates that the system found that the organization exists in your database, but the location address was changed or added by the data load. You can overwrite the new location number by specifying a location number or clearing the New Location Number check box.

School Type The system displays the type of this school, if a value exists on the School Type table used by the ATP Load External Data process.

Program In Years The system displays the program in years if a value exists on the source tape.

Proprietorship The system displays the name of the proprietorship if the value on the source tape matches a proprietorship value used by the ATP Load External Data process.

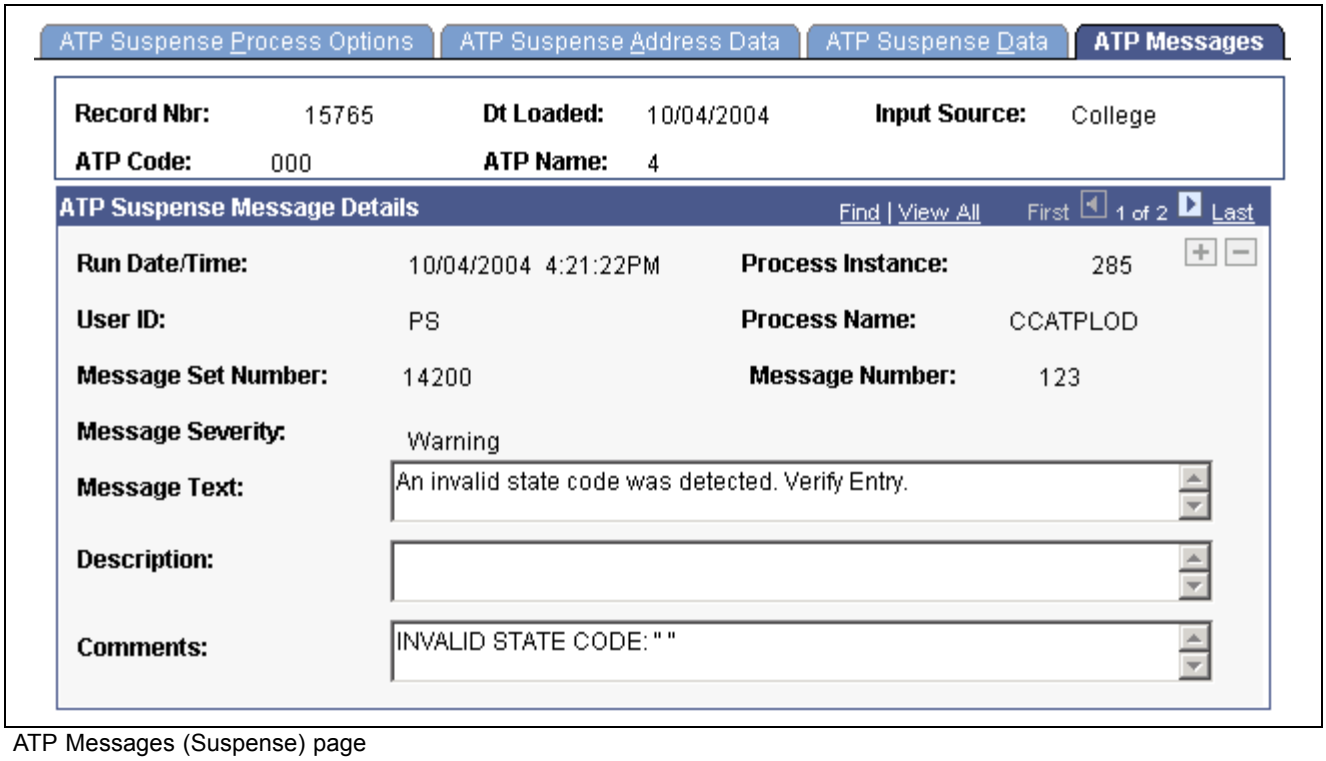
Values for this field are delivered with the system. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status of Institution The system displays the status of the institution if a value exists on the source tape.

Transcript Translation Required When selected, indicates that the transcript from this organization needs to be translated.

Reviewing ATP Data Suspense Messages

Access the ATP Messages (Suspense) page.

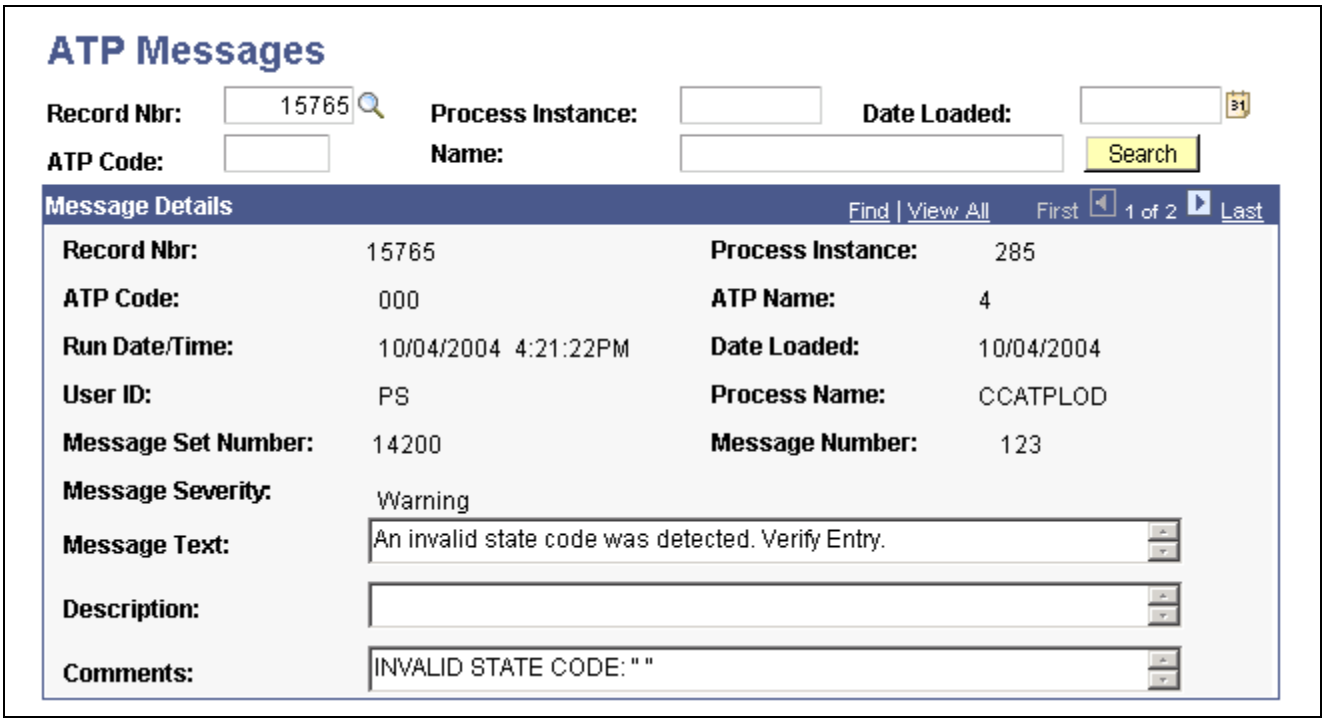


ATP Messages (Suspense) page

The ATP Messages (Suspense) page is for viewing purposes only. You cannot enter or modify data here.

Reviewing All ATP Messages

Access the ATP Messages page.

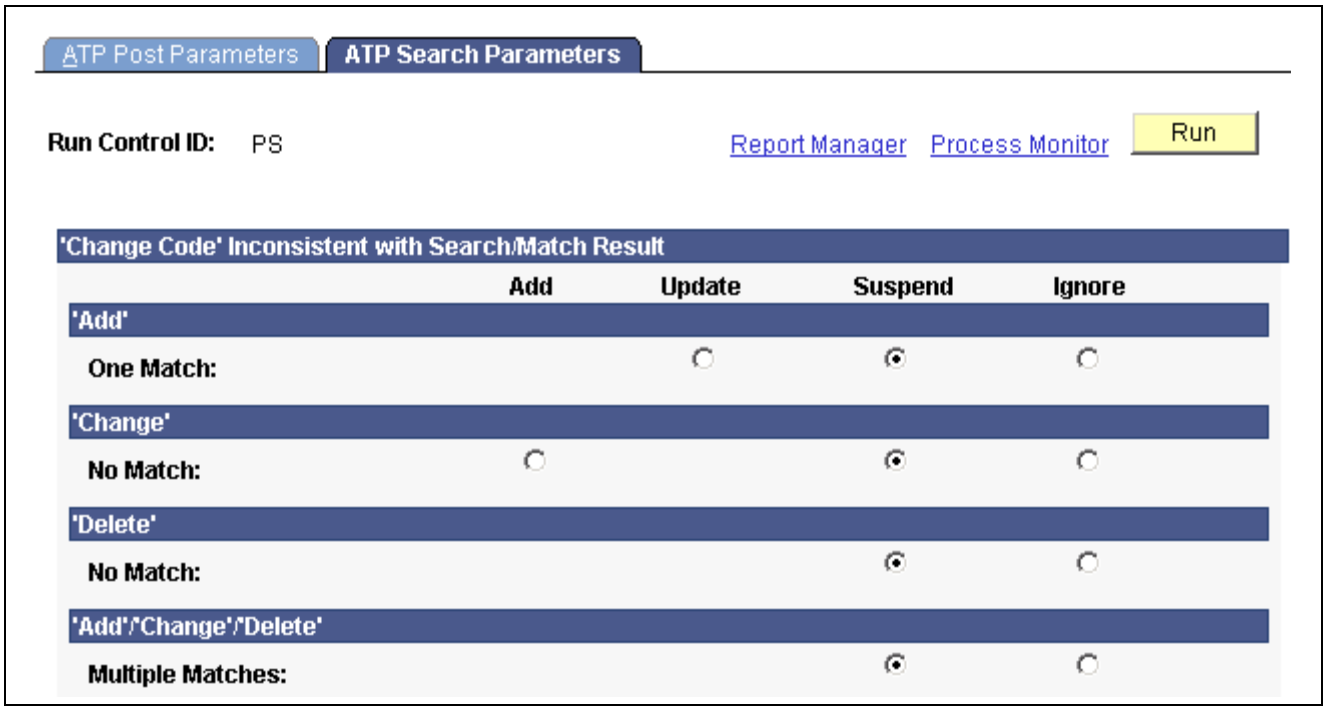


ATP Messages page

Enter any combination of record number, process instance (generated by the process scheduler), date loaded, and ATP code. Click the Search button to launch the search for all ATP messages based on the criteria you selected.

Specifying Search Parameters

Access the ATP Search Parameters page.



ATP Search Parameters page

These values are common to each group box on this page:

Add Select for the system to automatically add the load data.

Update Select for the system to automatically overwrite the existing data with the new load data.

Suspend Select for the system to set the load data aside and post a message about it to the ATP Messages page until you can investigate further.

Ignore Select for the system to do nothing with the load data or to your database, but to continue with the ATP Search/Match process.

Add

One Match Select what you want the system to do (update, suspend, or ignore) when the change code is *Add* and the Search/Match process finds one match.

Change

No Match Select what you want the system to do (update, suspend, or ignore) when the change code is *Change* and the Search/Match process finds no match.

Delete

No Match Select what you want the system to do (update, suspend, or ignore) when the change code is *Delete* and the Search/Match process finds no match.

Add/Change/Delete

Multiple Matches Select what you want the system to do (update, suspend, or ignore) when the change code is *Add, Change,* or *Delete* and the Search/Match process finds multiple matches.

Note. The Search/Match process used inside the ATP Search/Match/Post process is independent from Search/Match for organizations.

Searching for Duplicate Records and Posting the Data

Access the ATP Post Parameters page.

ATP Post Parameters page

Search/Match/Post Execution Option

Select the processes to run: *Search, Match and Post, Post Only,* or *Search and Match Only.*

Note. If you choose to run either *Search, Match and Post,* or *Search and Match Only,* you should indicate the conflict parameters on the ATP Search Parameters page.

ATP Post Processing Parameters

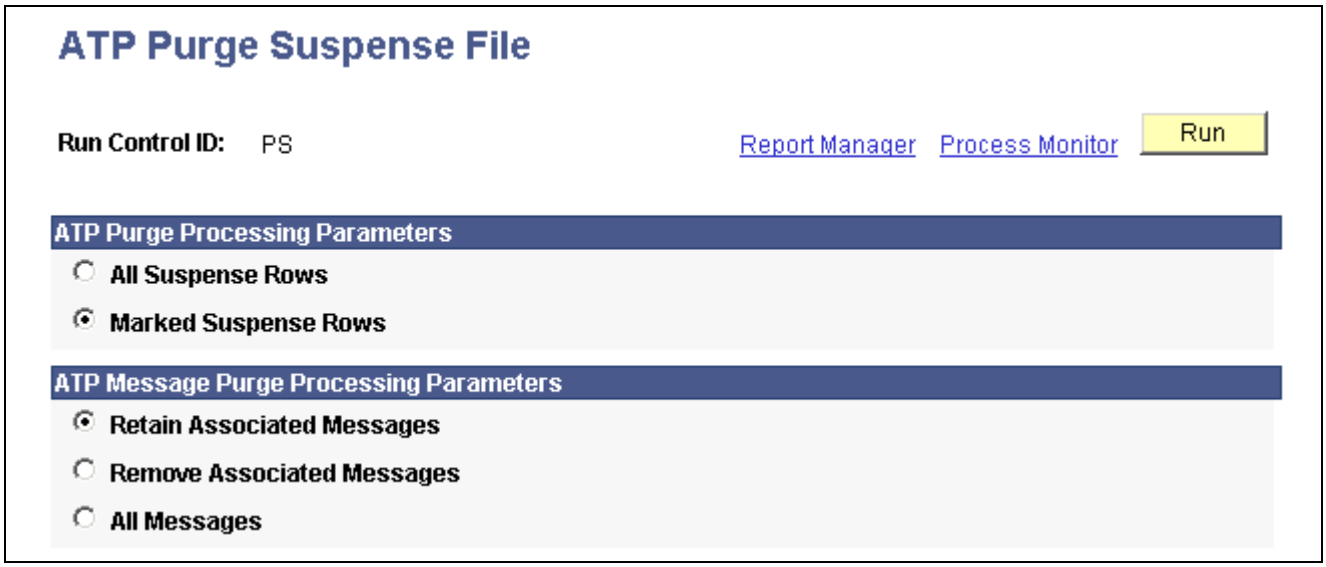
Process Single Record Select to set the specified process to run only on one record. You must specify the ATP record number for the school the system posts.

When you click Runand schedule the process, the PeopleSoft Process Scheduler runs the CCATPPST.SQR process and posts the ATP data.

Note. If you selected *Search, Match and Post,* or *Search and Match Only,* you should review messages on the ATP Messages page to investigate and resolve conflicts for which you set the search parameters to *Suspend.*

Purging ATP Data from the Suspense File

Access the ATP Purge Suspense File page.



ATP Purge Suspense File page

ATP Purge Processing Parameters

All Suspense Rows Select to set the process to purge all records in the suspense tables.

Marked Suspense Rows Select to set the process to purge only those records marked *Purge* in the suspense file, as indicated in the ATP Suspense Process Options page.

ATP Message Purge Processing Parameters

Remove Associated Messages Select to set the process to purge messages associated with the row of data selected by the Marked Suspense Rows option.

Retain Associated Messages Select to set the process not to purge any messages associated with the row of data selected by the Marked Suspense Rows option.

All Messages Select to set the process to purge all messages from the suspense files. You should select this option if you selected the All Suspense Rowsoption.

Loading External EPS Data

Use the EPS data load pages to load EPS market codes into the system similar to the way you load external ATP data. Some admissions offices use EPS market codes to focus their recruiting efforts in the geographic areas where they believe they will be the most successful.

See Also

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, "Loading and Assigning EPS Market Codes"

CHAPTER 37

Managing Committee Data

This chapter lists prerequisites and discusses how to:

- Create a committee.
- Assign committee members.

Prerequisites

Before creating a committee, create a committee template and then use the template to create similar committees or committees for similar events.

See Also

Chapter 17, "Setting Up Committee Templates," page 161

Creating Committees

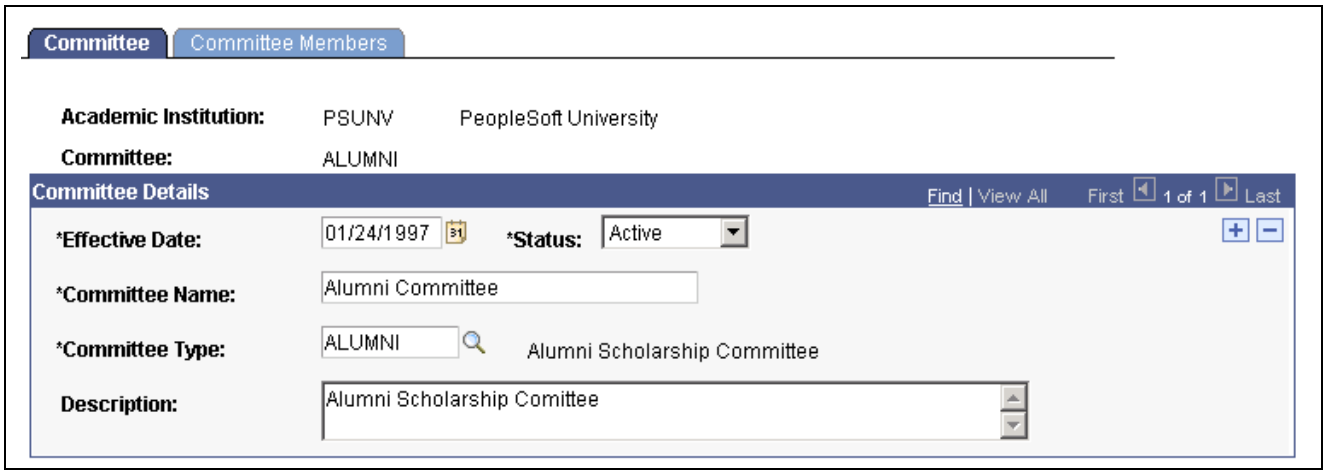
This section discusses how to create a committee.

Page Used to Create Committees

Page Name	Object Name	Navigation	Usage
Committee	COMMITTEE	Campus Community, Committees, Manage Committees, Committee	Create or review a committee.

Creating a Committee

Access the Committee page.



Committee page

Committee Details

Committee Name Enter a name for the committee.

Committee Type Select the type of committee, from the Committee Type/Roles page, that describes this committee.

Assigning Committee Members

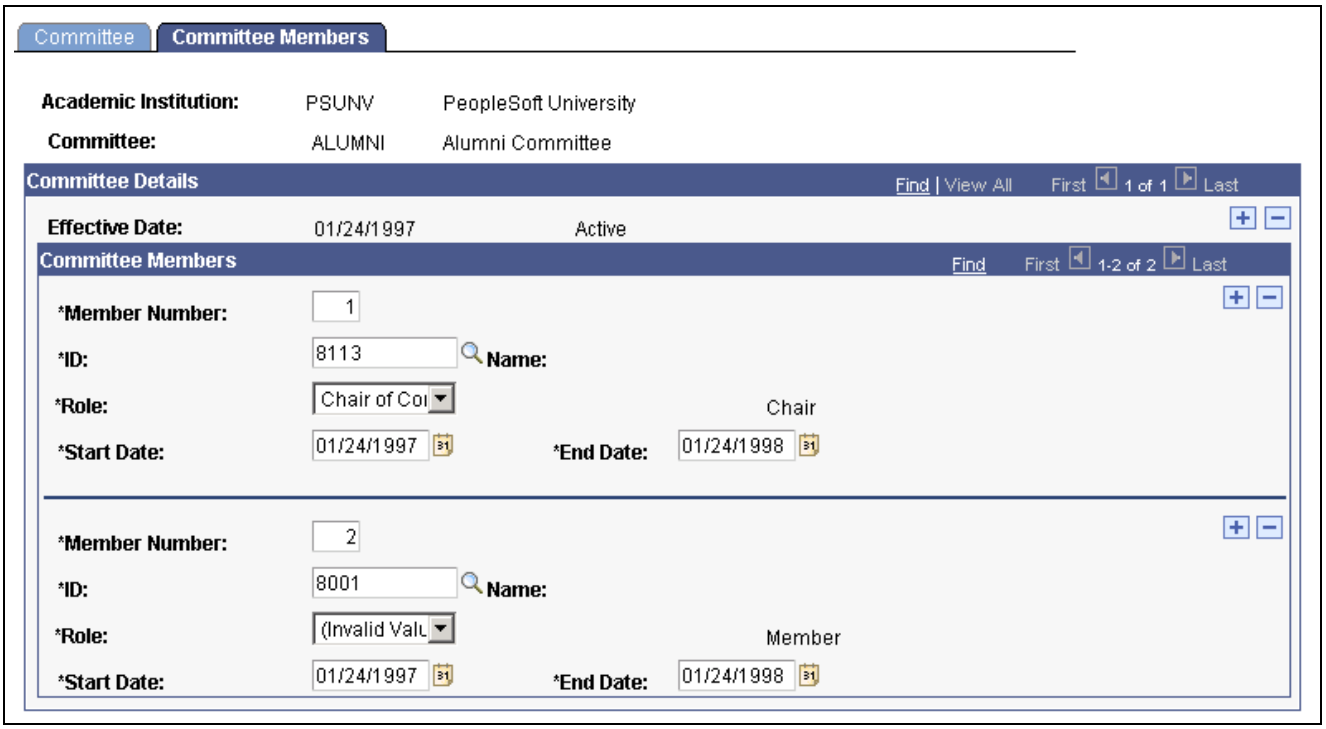
This section discusses how to assign members to a committee.

Page Used to Assign Committee Members

Page Name	Object Name	Navigation	Usage
Committee Members	COMMITTEE_MEMBERS	Campus Community, Committees, Manage Committees, Committee Members	Assign individual members to a committee.

Assigning Members to a Committee

Access the Committee Members page.



Committee Members page

Committee Members

Member Number The number of this member in the list of members for this committee.

The system automatically enters the next sequential number for each member that you add. You can override the number manually to reorder the list of committee members.

ID The ID of the individual assigned to this committee. The system displays the individual's name after you select the ID.

Role The role assigned to this individual for this committee.

Start Date The date when the member's participation in this committee is scheduled to begin.

End Date The date when the member's participation in this committee is scheduled to end.

CHAPTER 38

Managing Campus Event Planning

This chapter provides an overview of campus event planning, lists common elements, and discusses how to:

- Create an event.
- Track event attendance.
- Review event, meeting, and attendee information.
- View reports for events.

Understanding Campus Event Planning

You can use your system to help plan and manage campus events. A set of meetings comprises one overall event, and each meeting can have resources and staff assigned to it. For example, you could create an event called Orientation. Your template might include meetings such as a welcome reception, a general session, several workshops, and a tour of the campus. You can identify the required resources for each meeting (tables, chairs, brochures, banners, and so on), and assign and schedule the responsible staff.

Orientation, for example, is a recurring event, and each of the meetings might need the same resources and staff each time. You can create an Orientation event template to make it easier to regularly plan and manage this event. You can also use the template to plan similar events.

Courses are also events. You use event planning to assign classrooms, identify faculty, and schedule equipment for courses.

Note. Be careful not to confuse the events described in this chapter with 3C engine events. One attends the events described in this chapter; 3C engine events are data occurrences within the system.

You can use your system to get accurate counts of how many attendees you invited to an event, how many plan to attend, and how many actually attended.

You can identify attendees who are in your database versus those who are not. You can also add guests as attendees and associate them with the host attendee who invited them. Tracking guest information this way is especially useful in social situations. For example, if an attendee invites two coworkers who you know are key figures in the local community, you do not have to remember which attendee works with and invited them, you can check the list of attendees to find out.

Note. Attendees do not have to exist in your database to attend an event. However, if you want to add each attendee to your system, use the Biographical Information pages to create records and add them to your database. Adding attendees to your system enables you to include them in any confirmation, thank you, or other letter that you generate for the event.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Buildings, Rooms, and Classroom Facilities

Common Elements Used in This Chapter

Event ID The ID number for an event. When you create a new event on the Events page, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type Select the type, from the Event Types page prompt list, that describes the event.

Academic Institution The academic institution responsible for the event.

Event Manager The individual at your institution who is managing the event.

Event Meeting The number of each meeting in the list of meetings for an event. The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings are listed in the specified order.

Primary Meeting The primary meeting for the event. You can identify a primary meeting from the list of meetings for an event on the Event Template page. When you save the page, the system displays the event meeting number and corresponding meeting location for the primary meeting on the Event page.

Campus Coordinator The individual at your institution who is responsible for, or should be contacted about, this meeting.

Department Sponsor The department at your institution that is responsible for this meeting.

Manager The name of the responsible department's manager. The system displays the manager's name if one is associated with the department sponsor on the Department Profile page.

Attendee An individual who is invited or scheduled to attend any event meeting.

Guest Relationship The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required.

Creating an Event

This section lists prerequisites and discusses how to:

- Name an event.
- Add meetings to an event.
- Enter meeting details.
- Specify meeting sponsors.
- Enter the meeting location.
- Schedule meeting resources.

- Schedule meeting staff.

Prerequisites

Before creating events, define the types of events, staff, and resources. You might also find it helpful to set up general event templates from which to copy when creating specific events.

Set up internal departments and organization departments and contacts before designating event managers, sponsors, and contacts. You must set up facilities before you can designate event locations.

See Also

Chapter 18, “Setting Up Campus Event Planning,” page 165

Chapter 34, “Adding Organizations to Your Database,” Creating an Organization Record, page 513

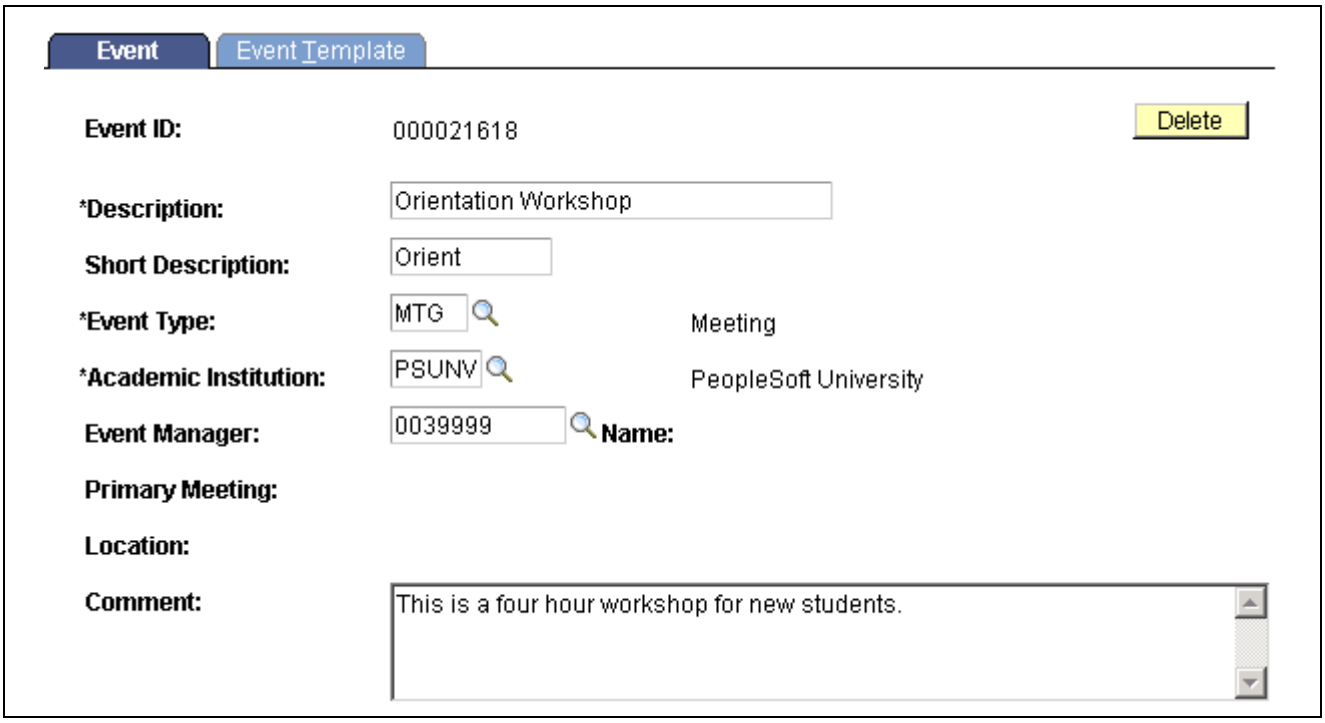
PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Preparing for the Course Catalog and Schedule of Classes,” Defining Buildings, Rooms, and Classroom Facilities

Pages Used to Create an Event

Page Name	Object Name	Navigation	Usage
Event	CAMPUS_EVENT	Campus Community, Campus Event Planning, Event Management, Events, Event	Name an event, including selecting the event type and assigning the event manager.
Event Template	CAMPUS_MEETING	Campus Community, Campus Event Planning, Event Management, Events, Event Template	Specify event meetings.
Meeting Detail	CAMPUS_MEETING1	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Detail	Enter meeting details, including date, time, and anticipated attendance.
Meeting Sponsor	CAMPUS_MEETING2	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Sponsor	Enter meeting sponsor and contact information.
Meeting Location	CAMPUS_MEETING3	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Location	Enter meeting location information.
Meeting Resources	CAMPUS_MTG_RSRCES	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Resources	Schedule meeting resources.
Meeting Staff	CAMPUS_MTG_STAFF	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Staff	Schedule meeting staff.

Naming an Event

Access the Event page.



Event page

Event ID When you create a new event, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type The type, from the Event Types page, that describes this event.

Academic Institution The academic institution responsible for this event.

Event Manager The individual at your institution who is managing this event.

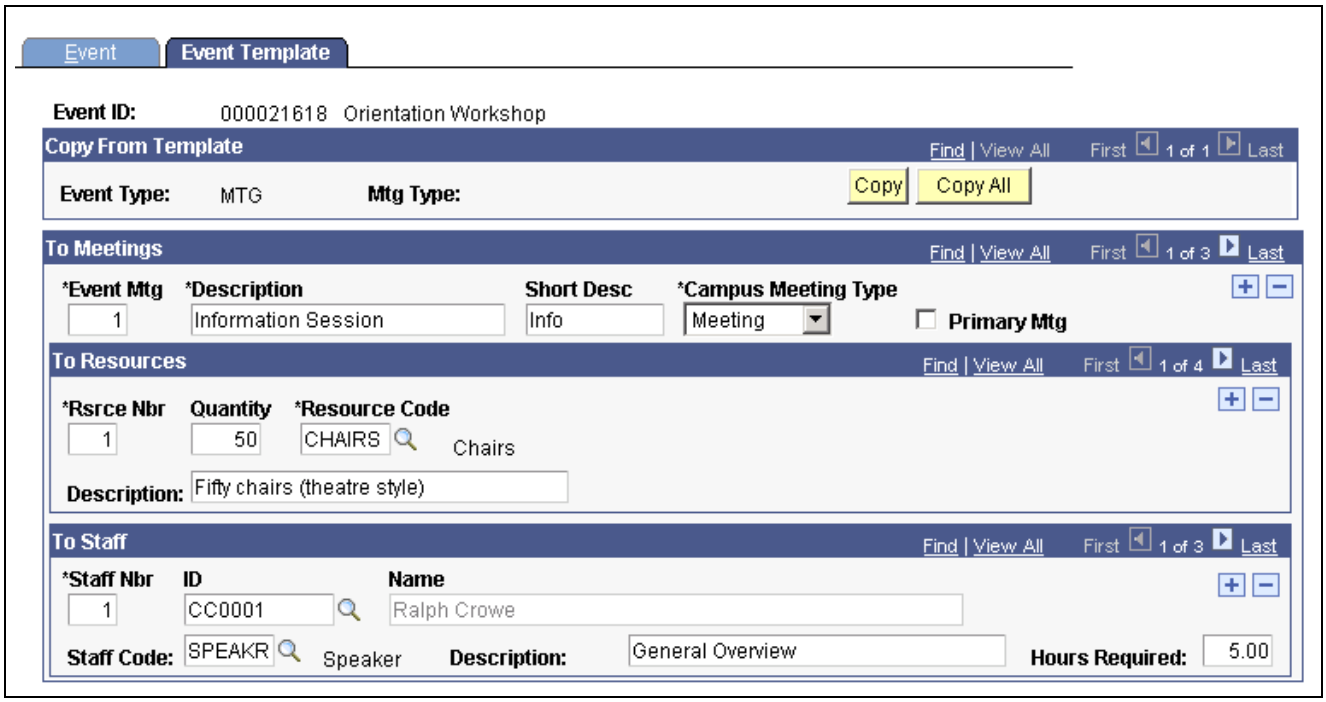
Primary Meeting After you identify a primary meeting for this event on the Event Template page and save that page, the system displays the number of that meeting here. The system displays the location for the meeting in the Location field.

Comment Comments to further identify or describe this event.

Delete Click this button to delete this event from your database.

Adding Meetings to an Event

Access the Event Template page.



Event Template page

Note. You can also add meetings to an event on the Meeting Details page.

Copy From Template

If meetings, resources, and staff templates exist for the selected event type (from the meeting Template page, Meeting Resource Templates page, and Meeting Staff Template page), the system displays that data here. You can click either the Copy or Copy All button to copy the information from those templates to this event. If no template exists, no data appears here and you must add the meetings and assign the resources and staff for this event.

Copy Click this button to copy each meeting set up for the event type selected with its resources and staff. You can manually change any of the copied information.

Copy All Click this button to copy all the meetings with their resources and staff. You can manually change any of the copied information.

Note. The Copy All button is especially helpful if, for example, if you have the same event each year. Instead of entering the information each time, you can click this button to copy all information from the template and update the information for the current year's event.

To Meetings

Primary Meeting When selected, indicates that this is the primary meeting for this event.

To Resources

Add the resources and quantity that you need for this meeting. You can also add a brief description.

To Staff

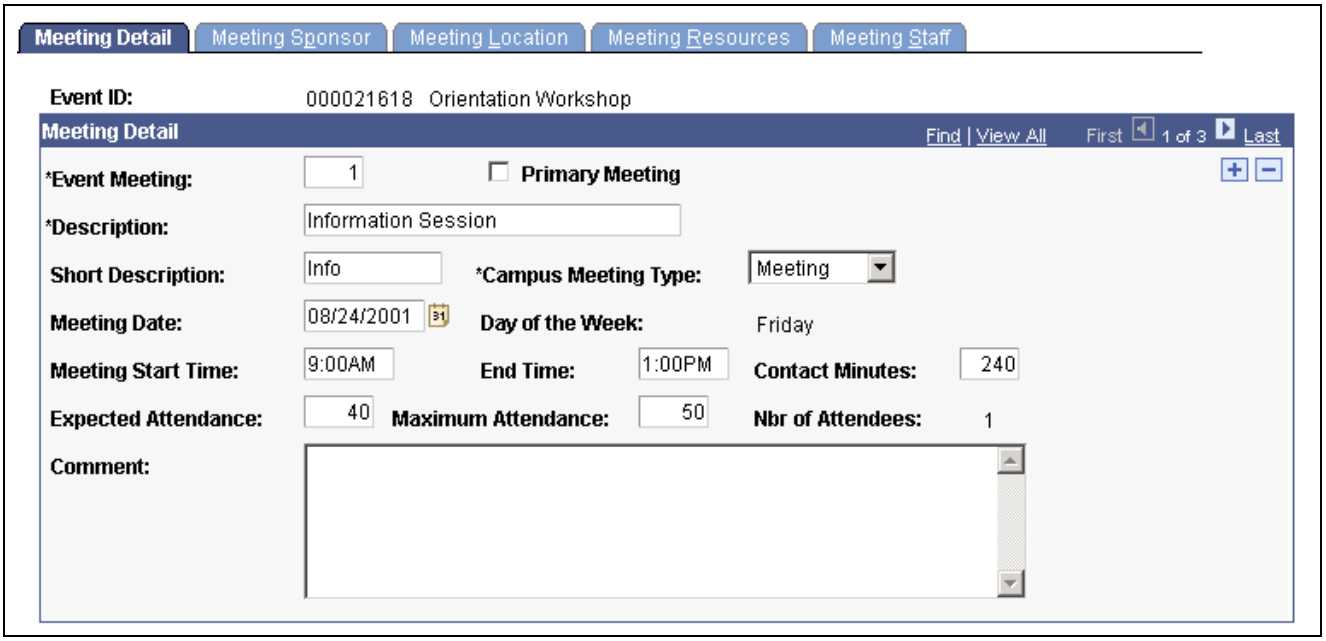
ID The ID of the individual responsible for this task.

Hours Required The number of hours that the assigned individual is required to perform or participate in this task.

You can also add a brief task description.

Entering Meeting Details

Access the Meeting Detail page.



Meeting Detail page

Meeting Detail

Event Meeting The number of this meeting in the list of meetings for this event.

The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.

Primary Meeting When selected, indicates that this is the primary meeting for this event.

Campus Meeting Type The meeting type that best describes this meeting.

Values for this field are delivered with the system. You can modify these.

Meeting Date The date when this meeting is scheduled to occur.

Day of the Week The day of the week when this meeting is scheduled to occur. The system automatically displays the day of the week when you exit the *Meeting Date* field.

Meeting Start Time The time when this meeting is scheduled to begin. The system assumes the time is *AM*. If not, you must enter *PM*.

End Time The time when this meeting is scheduled to end. The system assumes the time is *AM*. If not, you must enter *PM*.

Contact Minutes The length or duration of this meeting. The system calculates the contact time based on the meeting start and end times. The system recalculates the contact minutes each time that you change the start or end time. You can override the calculated minutes value.

Expected Attendance The number of attendees expected at this meeting.

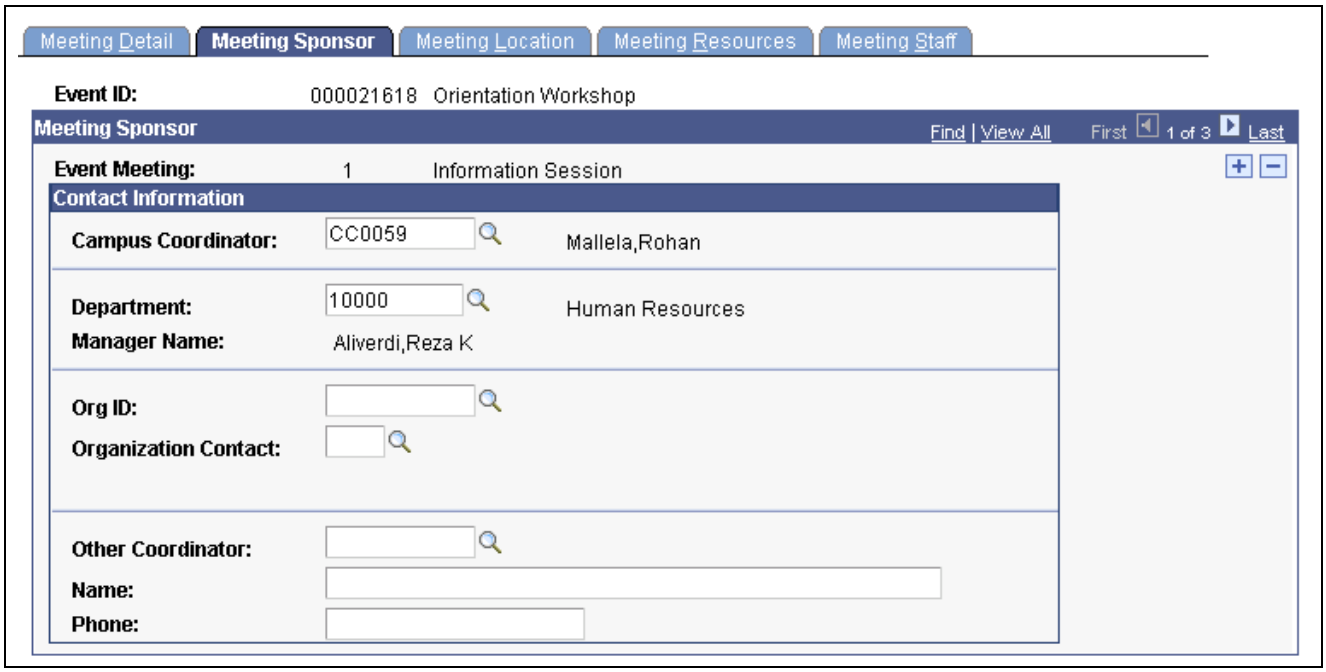
Maximum Attendance The maximum number of attendees that can be accommodated at this meeting.

Number of Attendees The number of attendees invited to this meeting. The system displays the number of invited attendees assigned to this meeting on the Event Attendees page.

Comments Comments to further identify or describe this meeting.

Specifying Meeting Sponsors

Access the Meeting Sponsor page.



Meeting Sponsor page

Contact Information

Campus Coordinator The individual at your institution who is responsible for, or should be contacted about, this meeting.

Department Sponsor The department at your institution that is responsible for this meeting.

Manager Name The name of the responsible department's manager. The system displays the Manager field and manager's name only if a manager is associated with this department on the Department Profile page.

Organization ID The organization that is responsible for or is sponsoring this meeting.

Organization Contact The individual in the responsible organization who you should contact about this meeting.

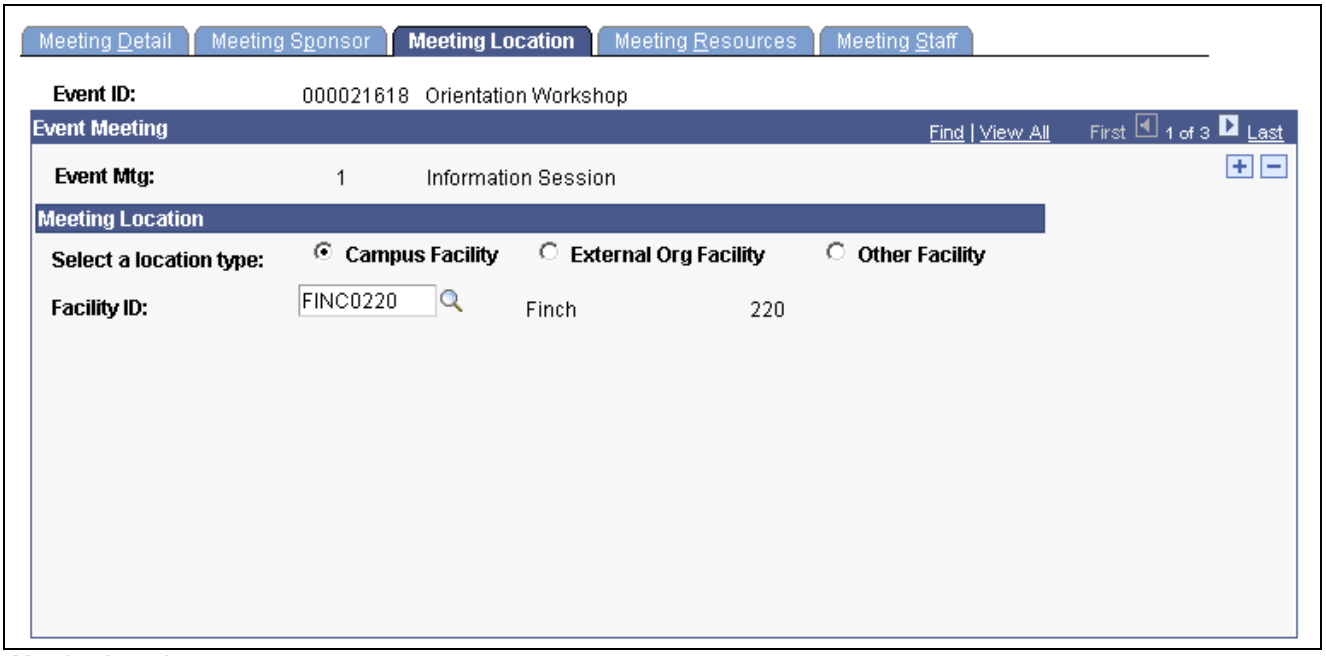
Other Coordinator The additional individual at your institution who is responsible for, or can be contacted about, this meeting.

Name The name of the additional contact person if the individual does not exist in your database.

Phone The phone number of the additional contact person if the individual does not exist in your database.

Entering the Meeting Location

Access the Meeting Location page.



Meeting Location page

Meeting Location

Campus Facility When selected, indicates that the location for this meeting is a campus facility.

When you select *Campus Facility,* the system provides the Facility ID field with a prompt list of facility IDs from the Facility Table page.

External Organization Facility When selected, indicates that the location for this meeting is a facility at or arranged by an external organization.

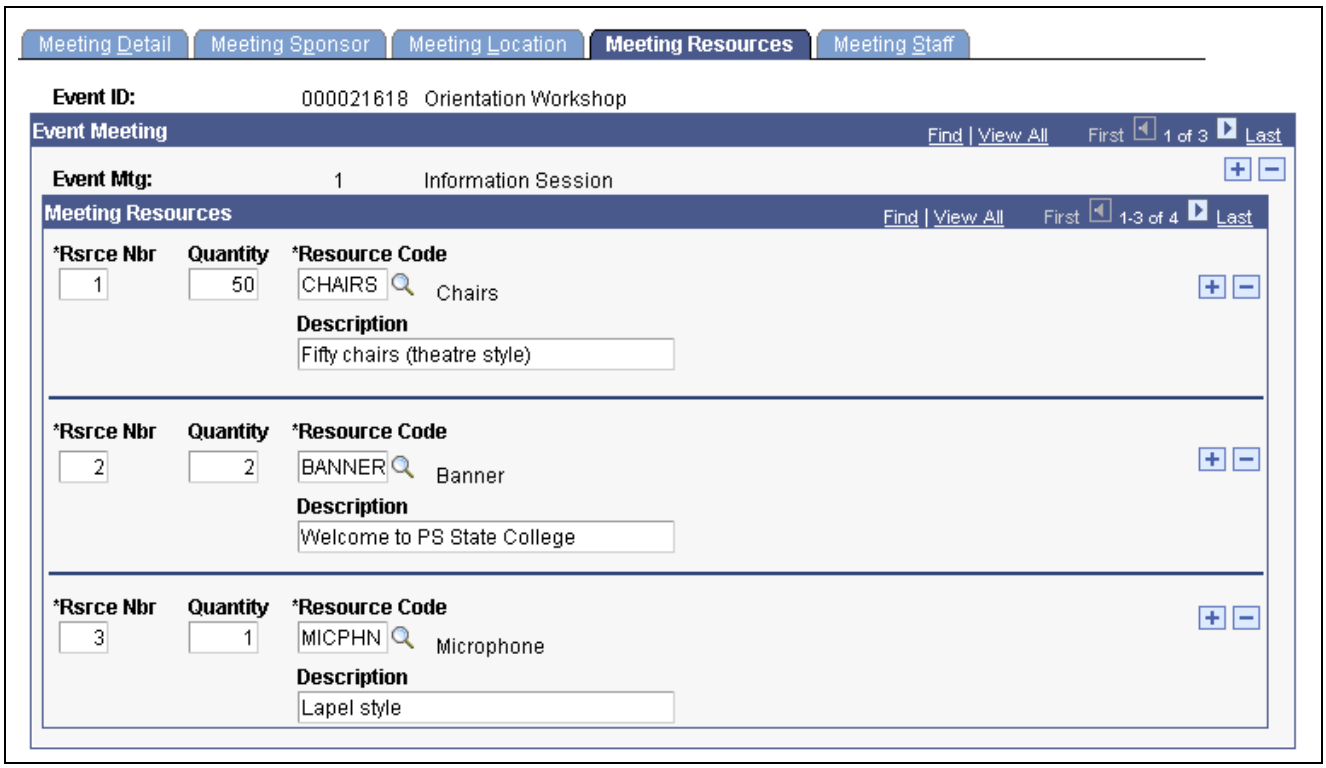
When you select the External Org Facility option, the system displays the organization ID and description from the Meeting Sponsor page and provides the External Org Location field with a prompt list of locations for the organization from the Organization Locations page. When you select a location number, the system displays the address for that location.

Other Facility When selected, indicates that the location for this meeting is a facility other than at your campus or at an external organization in your database.

When you select the Other Facility option, the system displays address fields for you to identify the address or location of the facility.

Scheduling the Meeting Resources

Access the Meeting Resources page.



Meeting Resources page

Meeting Resources

Resource Number The number of this resource in the list of resources for this meeting.

The system automatically enters the next sequential number for each resource that you add. You can override the number to reorder the list of resources. When you return to the page, the resources are in the specified order.

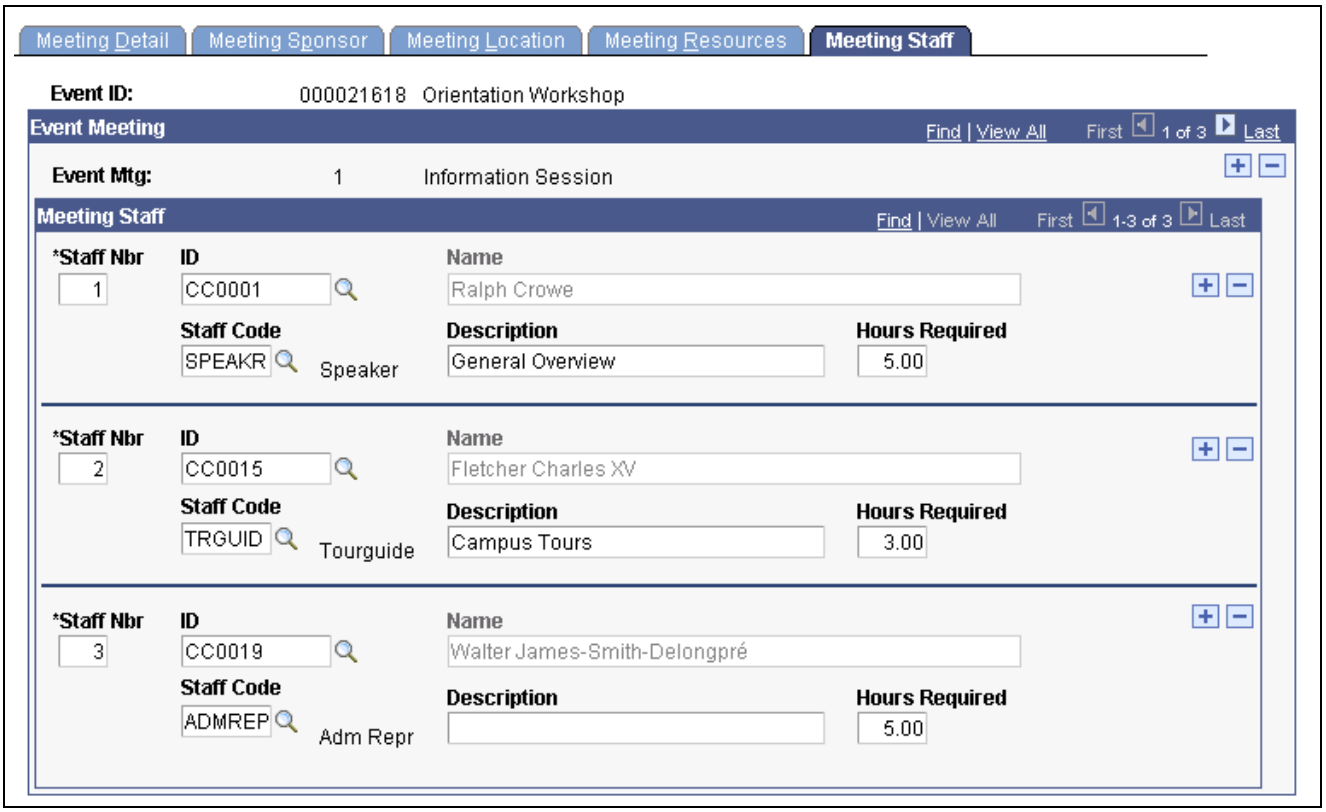
Quantity The number or quantity of the resource required for this meeting.

Resource Code The type of resource, from the Resource Codes page, required for this meeting.

Description A brief description to further identify or describe this resource.

Scheduling Meeting Staff

Access the Meeting Staff page.



Meeting Staff page

Meeting Staff

Staff Number The number of this staff person in the list of staff required for this meeting.

The system automatically assigns the next sequential number to each staff member that you add. You can override these numbers to rearrange the order of the staff. When you return to the page, the staff members are in the specified order.

ID The ID of the staff member responsible for this task.

Name The system automatically displays the individual's name when you select the ID.

If the individual does not have an ID in your system, you can enter his or her name in this field.

Staff Code The type of staff required for this meeting.

Description The task that the staff member is required to perform or participate in for this meeting.

Hours Required The number of hours that the responsible individual is required to perform or participate in for this task.

Tracking Event Attendance

This section discusses how to:

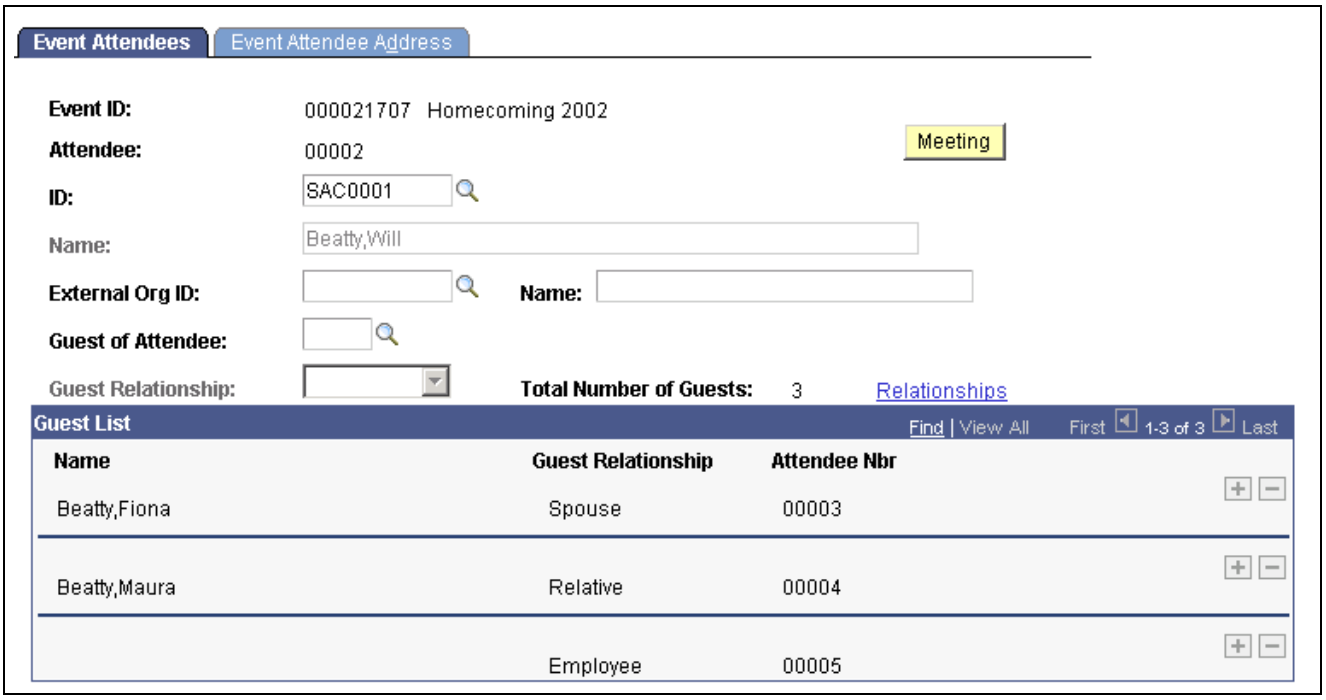
- Identify attendees and guests.
- Specify meetings for an attendee and review attendance statuses.
- (Optional) Enter an attendee's address.

Pages Used to Track Event Attendance

Page Name	Object Name	Navigation	Usage
Event Attendees	EVENT_ATTENDEE	Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendees	Identify individuals invited or scheduled to attend an event, and specify their guest relationships, if any.
Attendee Meetings	EVENT_MEETING1_SEC	Click the Meeting button on the Event Attendees page.	Identify the meetings to which an attendee is invited and the status of his or her attendance.
Event Attendee Address	EVENT_ATND_ADDR	Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendee Address	Enter and track attendee addresses for an event.

Identifying Attendees and Guests

Access the Event Attendees page.



Event Attendees page

Attendee The number of this individual on the list of attendees for this event. For example, attendee 00015 is the 15th attendee on the list of attendees in the system for this event.

Note. If you are entering an attendee for the first time, the Attendee field is all zeros. Do not override this value. After you enter data and save the page, the system assigns and displays the next sequential attendee number.

Meeting Click to access the Attendee Meetings page, where you can identify the meetings to which the attendee is invited.

ID The attendee's ID, if he or she exists in your database.

Name When you select the attendee's ID, the system automatically displays the individual's name here.

If the attendee does not exist in your database, you must enter the attendee's name here.

External Organization ID The organization's ID, if the attendee is from an organization in your database.

Name When you select the organization's ID, the system automatically displays the organization's name here.

If the organization does not exist in your database, you must enter the organization's name here.

Guest of Attendee The attendee number of the individual whose guest this individual is. An attendee can have multiple guests.

Note. You must first create guests as new entries on the list of attendees. You can then select them from that list and associate them as guests of the attendee described on this page.

Guest Relationship The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required. If you do not know the relationship, select *Unknown.*

When you save the page, the system lists all guests of the host attendee at the bottom of this page.

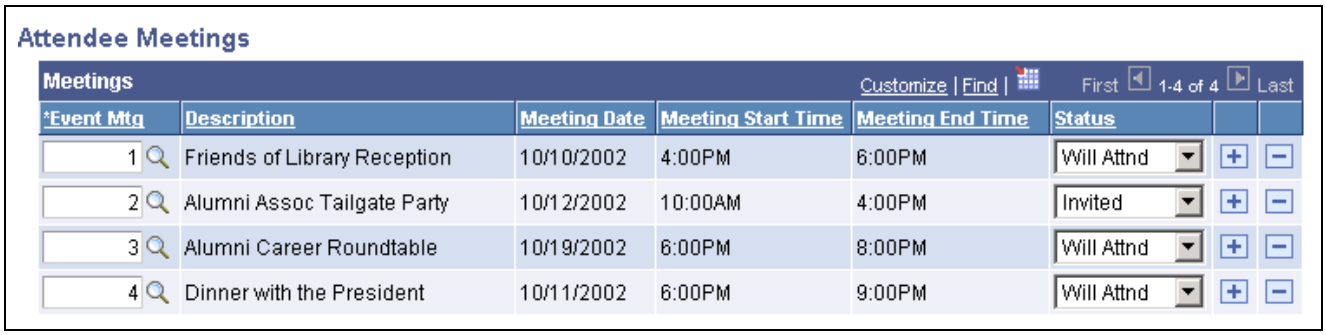
Values for this field are delivered with the system. You can modify these.

Relationships Click this link to access the Relationships search box page, where you can create or review a relationship between two individuals in your database.

Guest Relationship values are independent of the relationships that you set up on the Relationships page. Guest relationship is a quick method of identifying the association between two attendees specifically for an event.

Specifying Meetings for an Attendee and Reviewing Attendance Status

Access the Attendee Meetings page.



Attendee Meetings page

Meetings

Event Meeting The number of the meeting to which you want to invite the attendee.

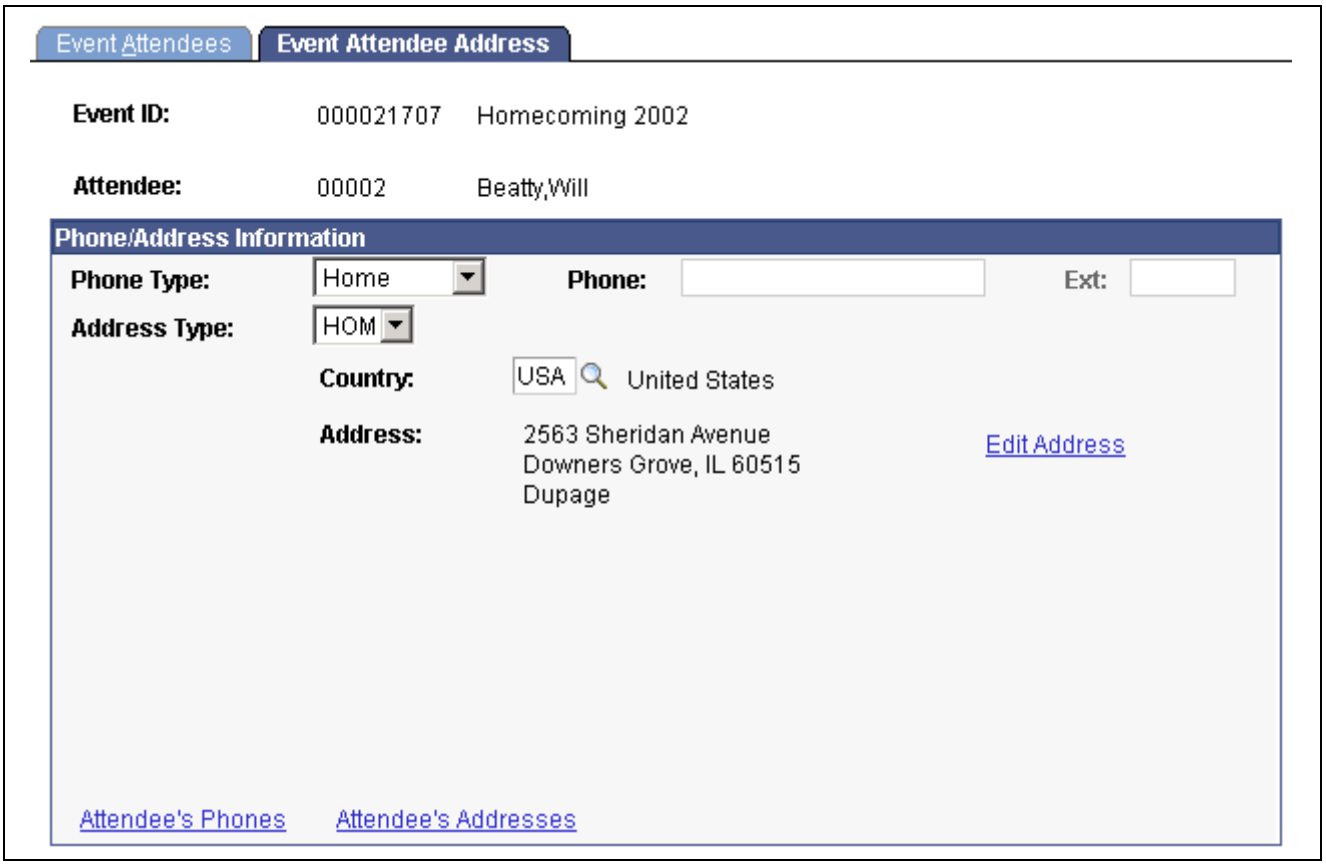
When you select the meeting, the system automatically displays the description, date, and start and end times for that meeting from the Meeting pages.

Status The status of the individual's attendance for this meeting. Status values are *Attended, Invited, Not Attend,* and *Will Attend.*

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

Entering an Attendee's Address (Optional)

Access the Event Attendee Address page.



Event Attendee Address page

Phone/Address Information

Phone Type The phone number to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* phone type and home phone number associated with the home address specified on the Installation Table - SA Options page. You can select a different phone type.

If the attendee does not have an ID in your database, enter the phone number manually.

Address Type The address to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* address type and home address data specified on the Installation Table - SA Options page. You can select a different address type.

If the attendee does not have an ID in your database, enter the address manually.

Attendee's Phones Click to access the Phone Number page, where you can add or edit the phone numbers for this attendee.

Attendee's Addresses Click to access the Addresses page, where you can add or edit the address data for this attendee.

Reviewing Events, Meetings, and Attendees

After you enter campus events, you can review the information in several ways. You can review events by facility, review all meetings or all attendees for an event, or review attendees for a meeting. You can even search meetings and events to determine if a specific individual is an attendee.

This section discusses how to:

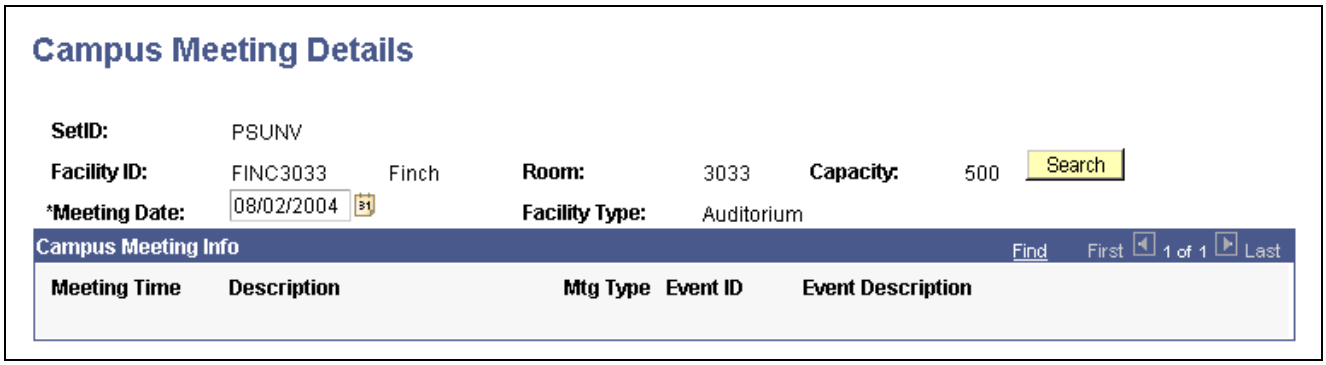
- Review events by facility and meeting date.
- Review event meetings.
- Review attendees for an event.
- Review attendees by meeting.
- Review event meetings for an attendee.
- Review an attendee’s event summary.
- Review an attendee’s guests.

Pages Used to Review Events, Meetings, and Attendance

Page Name	Object Name	Navigation	Usage
Campus Meeting Details	CAMPUS_MTG_DSPL	Campus Community, Campus Event Planning, View Event Information, Campus Meeting Details	Review events by facility and meeting date.
Event Meeting	CAMPUS_ATT_SUM_INI	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting	Review all meetings for an event.
Event Attendee	CAMPUS_MTG_ATT_INI	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee	Review all attendees for an event.
Event Meeting Attendees	ATTENDEE_SUMMARY	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting Attendees	Review attendees for meetings of an event.
Event Attendee Meeting	ATTENDEE_MTG_SUM	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee Meeting	Review meetings scheduled for specific attendees.
Person Event Summary	PERSON_EVENT_SUMM	Campus Community, Campus Event Planning, View Event Information, Person Event Summary	Review all of the events for which an individual is an attendee. This information is useful for viewing a summary of the individual's meeting schedule.
Attendee Meetings	EVENT_MEETING2_SEC	Click the Meeting button on the Person Event Summary page.	Review the specific meetings that an individual is scheduled to attend at an event.
Attendee Guests	ATTENDEE_GUEST_SEC	Click the Guest button on the Person Event Summary page.	Review all guests assigned to an individual for an event.

Reviewing Events by Facility and Meeting Date

Access the Campus Meeting Details page



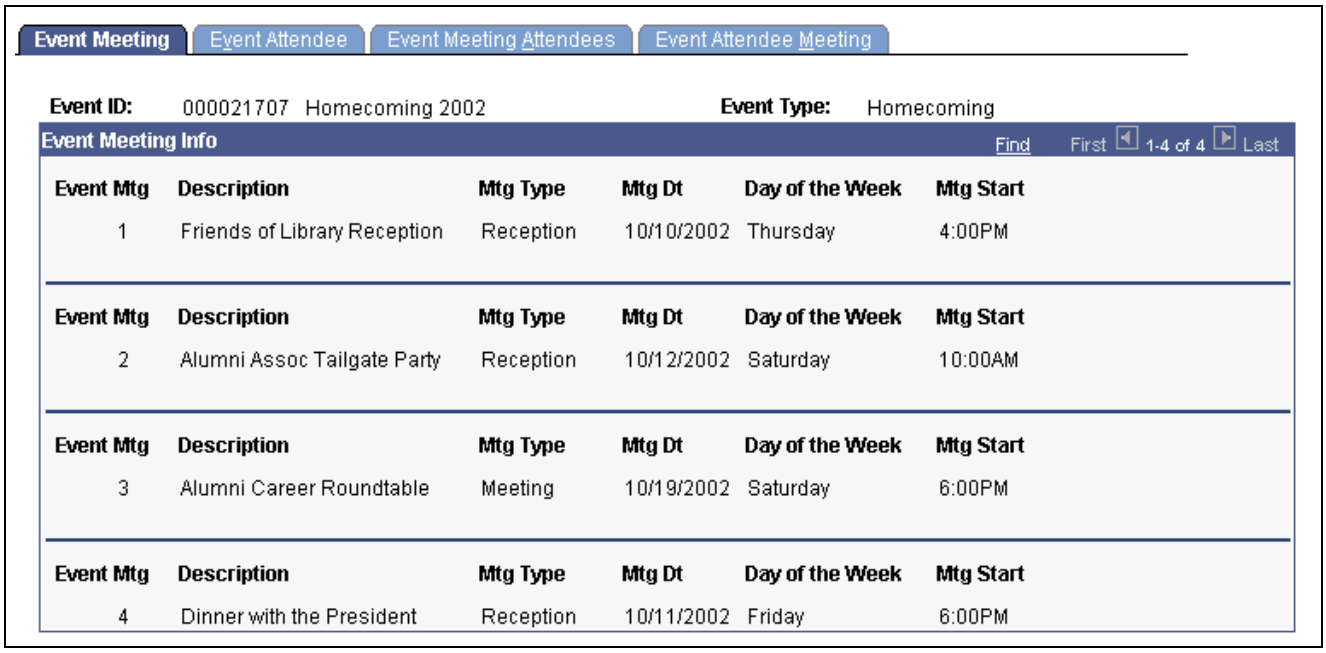
Campus Meeting Details page

Meeting Date The calendar date to review to determine if any meetings are scheduled for this facility.

Search Click this button to launch the search for meetings scheduled for the specified calendar date. If the system finds meetings scheduled for that date, it displays the data in the Campus Meeting Info scroll area at the bottom of the page.

Reviewing Event Meetings

Access the Event Meeting page.



Event Meeting page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees for an Event

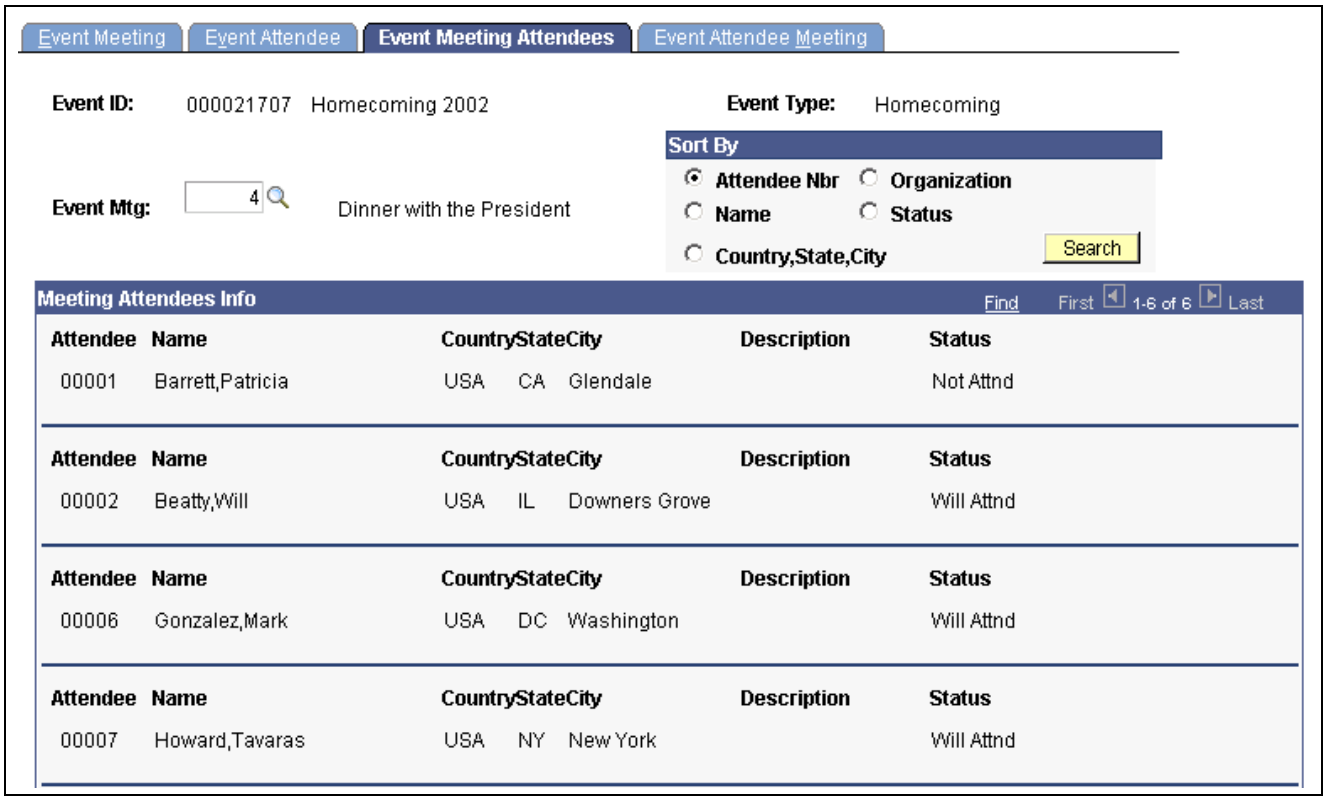
Access the Event Attendee page.

Event Attendee page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees by Meeting

Access the Event Meeting Attendees page.



Event Meeting Attendees page

Event Meeting The number of the meeting whose attendees you want to review. An event meeting number is required.

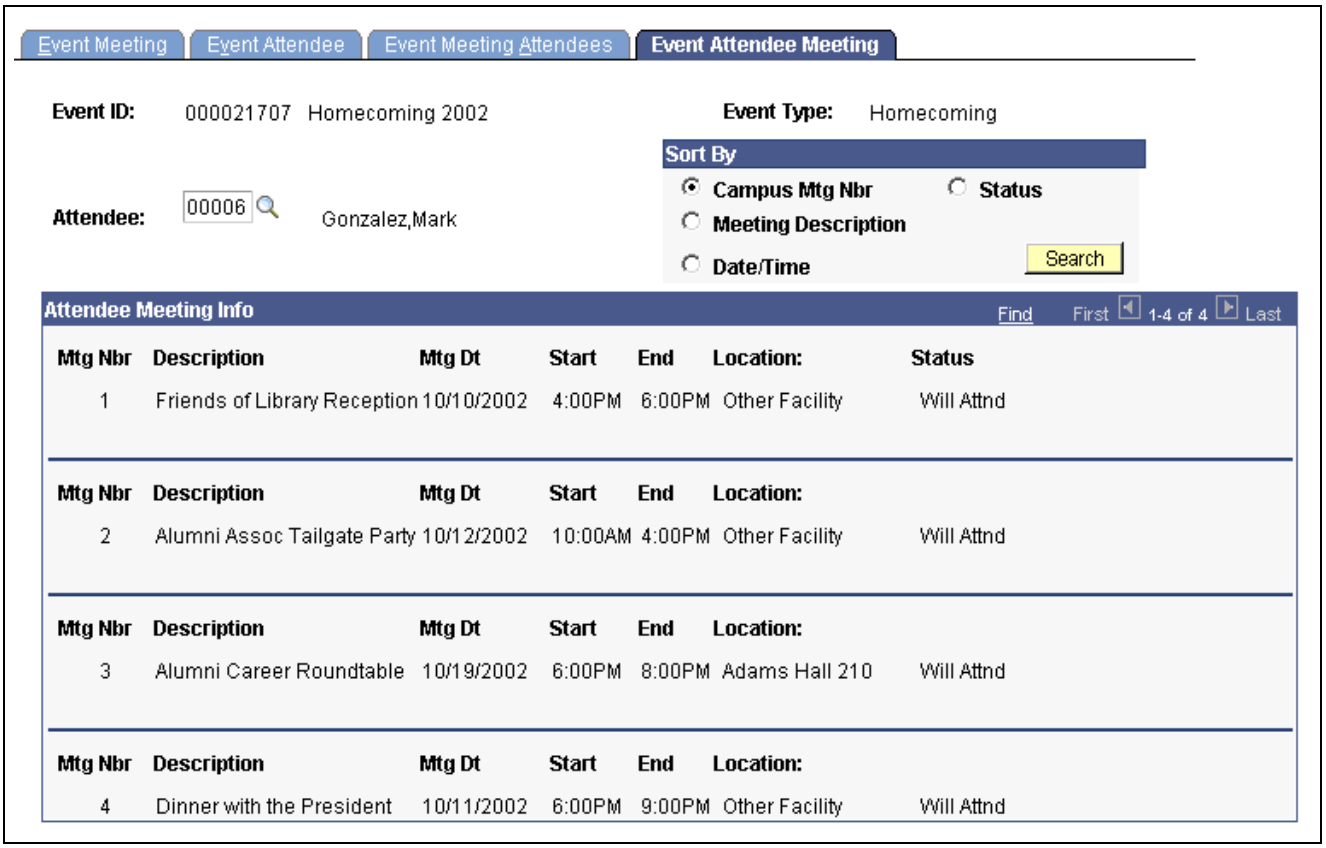
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria that you selected.

Reviewing Event Meetings for an Attendee

Access the Event Attendee Meeting page.



Event Attendee Meeting page

Attendee The attendee number of the attendee whose meetings you want to review. An attendee number is required.

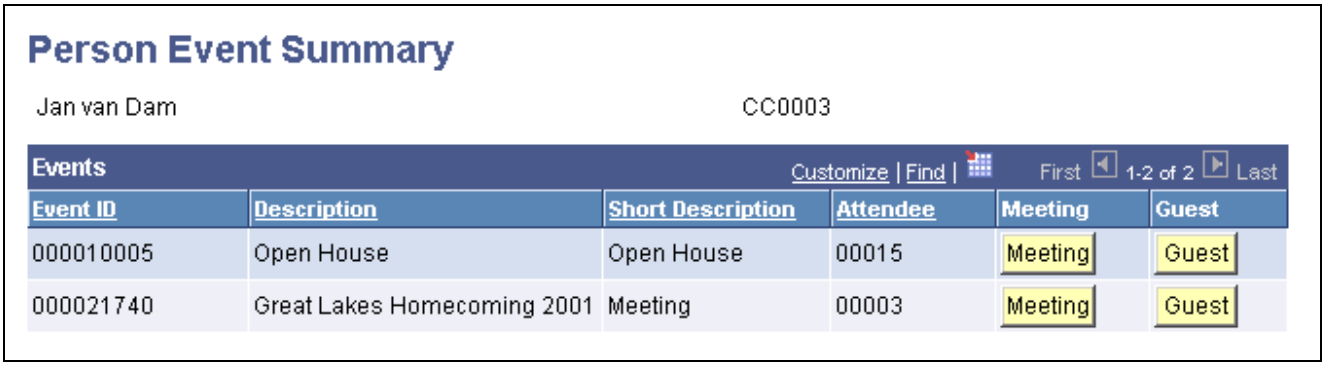
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria you selected.

Reviewing an Attendee's Event Summary

Access the Person Event Summary page.



Person Event Summary page

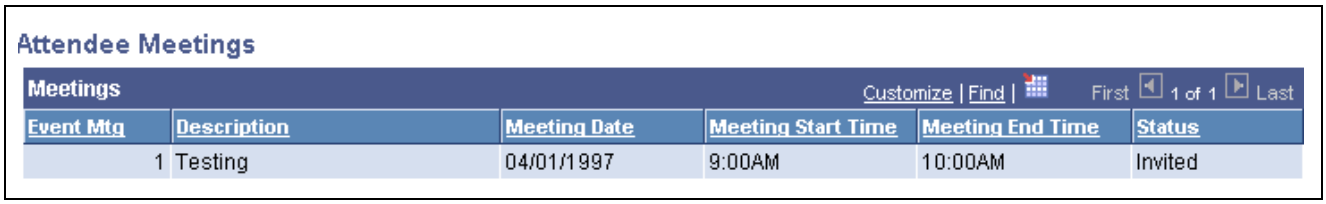
This page is for viewing purposes only. You cannot enter or modify data here.

Meeting Click to access the Attendee Meetings page, where you can view the specific meetings that the individual is scheduled to attend at an event.

Guest Click to access the Attendee Guests page, where you can view all guests assigned to this individual for an event.

Reviewing an Attendee's Event Meetings Summary

Access the Attendee Meetings page.

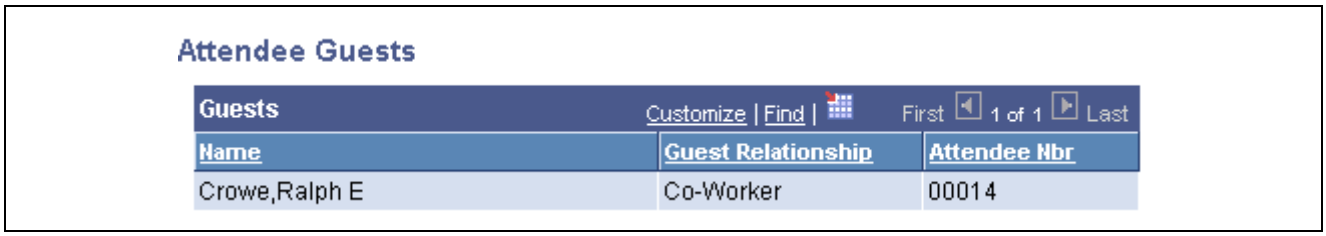


Attendee Meetings page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing an Attendee's Guests

Access the Attendee Guests page.



Attendee Guests page

This page is for viewing purposes only. You cannot enter or modify data here.

APPENDIX A

Campus Community Reports

This appendix provides an overview of PeopleSoft Enterprise Campus Community reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Campus Community Reports A to Z

This table lists Campus Community reports, sorted alphabetically by report ID. You might also find PeopleSoft Enterprise HRMS reports useful.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "PeopleSoft Application Fundamentals for HRMS Reports".

Note. Use PeopleSoft Process Scheduler to run Crystal reports.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

Report ID and Report Name	Description	Navigation	Run Control Page
PER020 Employee Home Address Listing (SQR Report)	Contains a complete listing of all employees with addresses and home phone numbers.	Workforce Administration, Personal Information, Biographical, Home Address Report	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER032 Passport/Visa Expiration (SQR Report)	Lists individuals (students, exchange visitors, and dependents) that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	• Campus Community, SEVIS, Reports, Passport/Visa Expiration • Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL
PER033 Citizenship/Country/Visa Audit (SQR Report)	Lists discrepancies between citizenship country/status and visa data for individuals. Displays various discrepancies found for the employee citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	• Campus Community, SEVIS, Reports, Citizenship/Country/Visa Audit • Workforce Administration, Personal Information, Citizenship, Citizenship/Country/Visa Audit	PRCSRUNCNTL
PER701 Department Table (CRYSTAL)	Lists all departments by Department ID.	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER705 Department Table (CRYSTAL)	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL
PER708 Country Table (CRYSTAL)	Prints a list of all of the countries and their character codes that are in the system.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL

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.

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