PeopleSoft®

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals 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

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Email

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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 Solutions Preface

This preface discusses:

- PeopleSoft products.
- Campus Solutions application fundamentals.
- Additional resources.
- Deferred processing.

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 product line.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft Enterprise Academic Advisement.
- PeopleSoft Enterprise Campus Community.
- PeopleSoft Enterprise Recruiting and Admissions.
- PeopleSoft Enterprise Contributor Relations.
- PeopleSoft Enterprise Financial Aid.
- PeopleSoft Enterprise Gradebook.
- PeopleSoft Enterprise Student Financials.
- PeopleSoft Enterprise Student Records.
- PeopleSoft Enterprise Campus Self Service.

Campus Solutions Application Fundamentals

The PeopleBooks for each PeopleSoft application provide implementation and processing information for the Campus Solutions system. However, additional, essential information describing the setup and design of the system appears in two companion volumes of documentation:

- *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook* (this PeopleBook).
- *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*.

Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the Campus Solutions product line. Whether you are implementing only one application, some combination of applications within the product line, or the entire Campus Solutions system, you should be familiar with the contents of this central PeopleBook (the book you are reading). It is the starting point for fundamentals, such as setting up control tables and administering security.

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook provides documentation on the Campus Community features that are basic to all the applications. Campus Community enables you to maintain and manage a wide range of biographic and demographic information on people and organizations of interest to an institution, both internal and external.

Deferred Processing

Several pages in the Campus Solutions applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

CHAPTER 1

Getting Started with Campus Solutions

This chapter discusses:

- Campus Solutions overview.
- Campus Solutions business processes.
- Campus Solutions integrations.
- Integration prerequisites and dependencies.
- Campus Solutions implementation.

Campus Solutions Overview

This section provides an overview of the Campus Solutions applications. Specifically, it provides overviews of:

- PeopleSoft Enterprise Campus Community.
- PeopleSoft Enterprise Recruiting and Admissions.
- PeopleSoft Enterprise Student Records.
- PeopleSoft Enterprise Academic Advisement.
- PeopleSoft Enterprise Financial Aid.
- PeopleSoft Enterprise Student Financials.
- PeopleSoft Enterprise Contributor Relations.
- PeopleSoft Enterprise Campus Self Service.

PeopleSoft Enterprise Campus Community

Campus Community enables you to maintain and manage a wide range of basic information about people and organizations of interest to the institution. Each application within Campus Solutions relies on this data which includes an individual's or organization's name, address, and system ID.

Campus Community provides the following functionality:

- *Personal Information Management*—This functionality enables you to create and maintain personal data to identify the individuals who comprise the campus community, including names and addresses. You can also track personal attributes such as languages, ethnicity, and religious preferences, and health , identification, and participation information. You also set FERPA control and manage system IDs here.
- *Organization Data Management*—This functionality enables you to maintain data about the schools and other organizations important to the institution, including addresses, contact names, and phone numbers.

- *SEVIS (Student and Exchange Visitor Information System) Visa Processing* —This functionality enables you to create and maintain foreign visas data about student (F/M) and exchange visitor (J-1) visas and relevant dependent data. This functionality includes the ability to submit required information to the US Department of Homeland Security (DHS) and incorporate updated information received from DHS.
- *The 3Cs*— This functionality (communications, checklists, and comments) enables you to create, track, and assign interactions with prospects, applicants, students, alumni, donors, and external organizations. The 3Cs are shared across all of Campus Solutions; this is important to consider when designing a 3C setup.
  - *Communication Management*—Enables you to manage the institution's incoming and outgoing contacts with students, prospects, recruits, staff, alumni, donors, and organizations.
  - *Checklist Management*—Enables you to create lists to track activities and dues dates, and identify their status at any time.
  - *Comment Management*—Enables you to enter notes in the database about individuals, organizations, or events.

PeopleSoft Enterprise Recruiting and Admissions

Recruiting and Admissions administers the institution's admission process by managing recruiters and tracking prospects and applicants. Admissions offices have the ability to empower prospective students through the self-service applications offered with Recruiting and Admissions includes automated processes such as application evaluations, external test score loading, recruitment category assignment, application loading from test score data, and academic transcript loading using the PeopleSoft EDI Manager tool.

The system's integration with Campus Community, Student Records, Student Financials, Financial Aid, and Academic Advisement reduces repetitive entry and enhance ease of communication across the institution's various departments. For example, when an applicant matriculates, her record automatically appears in Student Records.

Recruiting and Admissions includes this functionality:

Comprehensive Recruiting Capabilities

After you create a record for a prospective student, you can store extensive recruiting and education information. Communication, checklist, and comment tools help you tailor contact to meet their individual needs.

- Capture information about prospective students by means of the new request for information form or through data uploaded from search and testing databases.
- Maintain information about recruiters, including their role, the types of students they work with, the regions they serve, and their special interest areas.
- Assign regions, categories, and recruiters to a group of prospects based on a variety of selection criteria. For example, bio/demographic data, address data such as state and postal code, recruiting status, and recruiting center.
- Organize prospective students and applicants by geographic region, interests, extracurricular activities, their level of interest, and more.
- Plan and coordinate recruitment events for different programs targeting specific student populations.
- Develop tailored communication plans based on prospect's or applicant's individual characteristics.
- Load and assign EPS™ (Enrollment Planning Service) market codes to external organizations to help focus recruiting activities.
- Collect and analyze data about recruiting activities such as college fairs, open houses, recruiting trips, interviews, mailings, and publications.

Flexible Application Processing

Tailor the recruiting and admissions system according to the institution's unique requirements and practices. Recruiting and Admissions handles both manual and background processing.

- Maintain multiple applications for an individual applicant.
- Tailor admission requirements and processing for each academic program.
- Enable applicants to track application status history through the web.
- Create admission rating schemes and criteria for automated evaluations.
- Load transcripts, tests, and applications from external agencies and central application services.
- Enable an applicant to accept or decline their admission as well as pay their deposit fee online.
- Update applicant status automatically based on a program's individually defined criteria.
- Automate evaluations and updates of admission decisions.
- Set up expert data entry to ease data entry.
- Admit students without going through the formal admissions process with Quick Enroll/Admit.
- Quickly delete a prospect or applicant record entered in error.

Recruiting and Admissions includes a variety of summary information pages that provide easy access to data, enabling institutions to make informed day-to-day admissions decisions.

Enrollment Management Features

Set enrollment management targets for specific groups you define by academic institution, career, and term. You can further specify targets by admit type, program status, academic program, gender, and ethnic group. Recruiting and Admissions automatically calculates current enrollment target results.

- Design a three-level hierarchical structure of enrollment targets with the ability to group and link the levels however you want.
- Display enrollment target results at any time to track progress toward institutional recruiting efforts.
- View a list of people who meet the target selection criteria.
- Create new targets by using the template feature to copy the details you want from existing targets.
- Generate enrollment management reports listing the target and actual levels the institution has defined.
- Measure the success of admissions decisions. For example, you can look at how many enrolled students eventually graduate.

PeopleSoft Enterprise Student Records

Student Records enables you to enter, track, and process all of the academic information. PeopleSoft minimizes repetitive data entry while enabling you to gain maximum control over the records—from the course catalog and schedule of classes to student programs, plans, and subplans.

After applicants are admitted and matriculate, Student Records moves forward to activate, enroll, grade, evaluate, and graduate students. In concert with Academic Advisement processes, the Student Records application tracks students through graduation.

The major features within Student Records are:

- Course catalog.
- Schedule of classes.

- Repeat checking.
- Instructor workload.
- Enrollment.
- Transfer credit processing.
- Attendance tracking.
- Student grading.
- Student data tracking.
- Transcripts.
- Academic statistics.
- Enrollment verifications.
- Graduation processing.
- LMS (Learning Management Systems) integration.

PeopleSoft Enterprise Academic Advisement

Academic Advisement is the application within Campus Solutions that is used to track the requirements and policies that a student must satisfy to graduate. As a student progresses toward graduation, Academic Advisement analyzes those courses completed by the student—both successfully and unsuccessfully—and ascertains what requirements are still outstanding.

Using data from Student Records and requirements entered in Academic Advisement, this application automatically tracks a student's degree progress. After you enter requirements into the system, you can analyze a student's data against the requirements to report degree progress. You can also perform what-if scenarios for student to see what courses they might need to complete for a particular major.

With this application, you can:

- Establish and review academic course lists, requirements, and requirement groups.
- Share courses.
- Modify existing requirements and make exceptions for a specific student.
- Create advisement reports.

PeopleSoft Enterprise Financial Aid

Financial Aid provides a powerful and flexible tool to manage the operations of an institution's financial aid office. The system starts with Federal and Institutional Aid applications and leads you through automated need calculations, budgets, awards, disbursements, loan processing, and tracking data. Support of Department of Education regulations are incorporated into Financial Aid on a regular basis so that the institution remains in compliance with Department of Education regulations and has access to new federal aid initiatives. Financial Aid helps you process and track loan applications under the federal Direct Lending and Federal Family Educational Loan Program (FFELP), along with state, university, and alternative loan programs more efficiently and effectively.

With this application, you can:

- Establish the general processing for your financial aid office, including award cycles and terms, aid eligibility and packaging, budgets, and application processing options.
- Process multiple types of aid applications and assess student eligibility.

- Award, package, and disburse aid to students.
- Set up and administer CommonLine, Common Record CommonLine, and Direct loan programs.
- Manage Pell payments and Title IV funds.
- Manage students' work study.
- (CAN) Set up and process Canadian financial aid applications.
- Manage the Fiscal Operation Report and Application to Participate (FISAP).

PeopleSoft Enterprise Student Financials

Student Financials is a tool for higher education institutions to manage student receivables, billing, collections, and cashiering. Using Student Financials, both staff and students can quickly find and use the financial information they need to make critical decisions.

Student Financials receives information from virtually all areas of Campus Solutions. With this application, you can:

- Calculate fees and tuition.
- Maintain customer account information.
- Create bills.
- Establish payment plans.
- Refund tuition and fees.
- Perform cashiering.
- Process collections.
- Interface with a general ledger system.
- Set up and print tax forms.

PeopleSoft Enterprise Contributor Relations

Contributor Relations is a comprehensive solution that helps contributor relations professionals to optimize strategic planning and decision making. The application seamlessly integrates with other PeopleSoft applications within Campus Solutions, Financials, and Human Resources to create an enterprise-wide organizational solution.

Using Contributor Relations, you can implement strategic plans for the handling of constituents, and manage complex campaign efforts, multifaceted events, volunteer efforts, and membership drives using the initiative management feature. Contributor Relations includes a comprehensive gift processing feature that handles the entry of gift, pledge, and membership transactions. This component includes functionality for handling matching gifts, tribute and memorial gifts, acknowledgements, and giving club membership.

Contributor Relations supports all major components of a philanthropic or nonprofit organization in one application. Contributor Relations' eight component functions are completely integrated, enabling efficient workflow, effective data tracking and retrieval, sophisticated reporting features, and cohesive common processes throughout the enterprise.

The eight component functions within Contributor Relations are:

- Constituent Information
- Gift and Pledge
- Prospect Manager

- Event Manager
- Campaign Manager
- Volunteer Manager
- Membership Manager
- Planned Giving

PeopleSoft Enterprise Campus Self Service

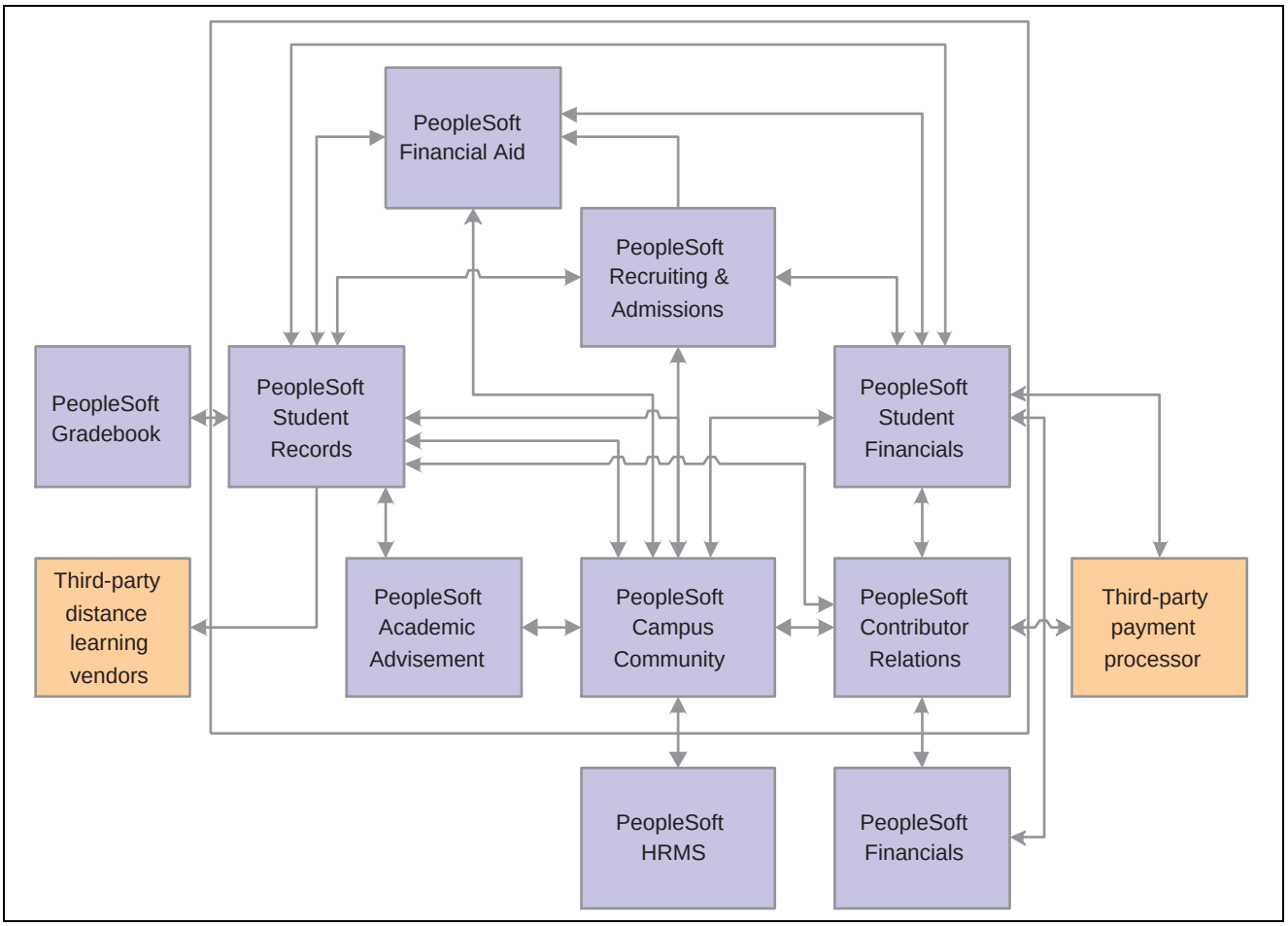
Campus Solutions offers Campus Self Service as a separately licensed product. If you have licensed Campus Self Service, you can use the self-service pages described in the *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*.

Self-service applications bring multiple transactions together into a single unit. You can use self-service pages to provide system access to students, applicants, alumni, faculty, visitors, and other users and allow them to perform a variety of self-service transactions.

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

Campus Solutions Integrations

The following process flow illustrates the high-level Campus Solutions business processes:



Campus Solutions 8.9 integrations

Implementation Prerequisites and Dependencies

This section provides an overview of the dependencies within Campus Solutions and discusses implementation considerations for:

- Campus Community and institutional structure.
- Student Records.
- Recruiting and Admissions.
- Academic Advisement.
- Financial Aid.
- Student Financials.
- Contributor Relations.
- Gradebook.

Each product's PeopleBook discusses the product's business processes, integrations, and implementation considerations in greater detail.

Understanding Dependencies Within Campus Solutions

Before you use Campus Solutions, load the tables in the proper order. When populating tables in Campus Solutions, it is important that you load data in a prescribed sequence. This sequential order takes into account each table's data dependencies and hierarchical layers. For example, institutional structure must be defined first because all of the applications in Campus Solutions are dependent on the basic structure you set up for the institution.

Before you implement Campus Solutions, decide the order in which to implement each application. For example, you may need to "go live" with Financial Aid before completing the implementation of Student Financials. By reviewing the information for Financial Aid, you see that you must set up Item Types in Student Financials before you can set up Financial Aid Item Types. With this knowledge, Financial Aid and Bursar's staff can work together to make the necessary accommodations to the system.

Note. In addition to reviewing this information it is also recommended that you review the documentation on data conversion and shared values between Campus Community and the PeopleSoft Enterprise Human Resources Management system.

Warning! Because of dependencies between applications, it is important that you take the information that follows into consideration prior to beginning the application setup process.

Preparing for Campus Community and Institutional Structure

If you have licensed PeopleSoft Enterprise Human Resources Management or PeopleSoft Enterprise Financials, you will want to coordinate the setup of the following:

- Person IDs.
- Personal attributes.
- Organization IDs.
- Organization locations, campuses, departments, and facility tables.

Detailed information for setting these up in Campus Solutions can be found in the *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook.*

Preparing for Student Records

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Student Records 8.9 PeopleBook.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Student Records system.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Student Records needs of these features are in place.
- Coordinate the setup of General Ledger options and Fees with Student Financials and Financials.
- Coordinate the setup of Instructor and Advisor Personal Data with Human Resources.
- Coordinate the setup of transcripts with Academic Advisement.

Preparing for Recruiting and Admissions

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence and selected parts of the Student Records setup sequence must be completed prior to setting up the Recruiting and Admissions system.
- Coordinate the setup of School Subject and External Courses for transcript credit purposes with Student Records.
- Coordinate the setup of Application and Deposit Fees with Student Financials.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Financial Aid.

Preparing for Academic Advisement

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Academic Advisement 8.9 PeopleBook.*

Preliminary setup tasks:

- Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Academic Advisement system.
- Student Records must be set up before beginning the setup of Academic Advisement.

  In particular, a transcript type for Academic Advisement must be created so you can run advisement reports.
- An active student must be set up in Campus Community and Recruiting and Admissions before you can run an academic advisement report or set up student exceptions.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the Academic Advisement needs of these features are in place.

Preparing for Financial Aid

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Financial Aid system.
- Review 3Cs—Communications, Checklists, and Comments—and Service Indicator setup to make sure the FAN letter and other financial aid needs of these features are in place.
- Coordinate the setup of Early Financial Aid Offers and Prospect Cross Reference with Recruiting and Admissions.
- Coordinate the setup of item types and keywords with Student Financials.

  Establish the Item Group FA-BUDGET with Student Financials and set up the Financial Aid Origin to be used for disbursing aid.

Preparing for Student Financials

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Student Financials 8.9 PeopleBook.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community, Recruiting and Admissions, and Student Records setup sequences must be completed prior to setting up the Student Financials system.
- Coordinate the setup of General Ledger options with the Financials system counterparts to ensure you are using valid account and ChartField combinations.
- If you run Student Financials refunding through PeopleSoft Enterprise Payroll or PeopleSoft Enterprise Accounts Payable, coordinate refunding options with the Financials system counterparts.
- Review 3Cs—Communications, Checklists, and Comments—and service indicator setup to make sure the Student Financials needs of these features are in place.
- Coordinate the setup of item types and keywords with Financial Aid and Contributor Relations.
- Coordinate the setup of application and deposit fees with Recruiting and Admissions.

Preparing for Contributor Relations

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook.*

Preliminary setup tasks:

- Complete the Institutional Structure/Campus Community setup sequence, including departments, before setting up the Contributor Relations system.
- Coordinate the setup of item types with Student Financials.

  This setup is required prior to completing Contributor Relations gift or membership setup.

Preparing for Gradebook

Detailed information for these setup tasks can be found in the *PeopleSoft Enterprise Gradebook 8.9 PeopleBook.*

Preliminary setup tasks:

- The Institutional Structure/Campus Community setup sequence must be completed prior to setting up the Gradebook system.
- Student Records must be set up before beginning the setup of Gradebook.

  In particular, the course catalog must be populated. Additionally, classes must be scheduled and students must be enrolled to use the Gradebook.

Campus Solutions Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for an 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 Solutions also provides component interfaces to help you load data from the existing system into Campus Solutions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables. Each product's specific component interfaces are discussed in the Getting Started chapter of its PeopleBook.

Other Sources of Information

In the planning phase of an implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface, with information about where to find the most current version of each.

See Also

"PeopleSoft Enterprise Campus Solutions Preface," page xxvii

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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

CHAPTER 2

Introducing Business Units and Data Sharing

This chapter provides overviews of PeopleSoft business units and data sharing among business units and discusses how to:

- Select a business unit structure.
- Implement tableset sharing.

Understanding PeopleSoft Business Units

Before you implement the Campus Solutions applications for an institution, take a close look at how the institution functions operationally. To make the most of PeopleSoft's flexible design, you have to first decide how you want to map the operational structures into PeopleSoft applications.

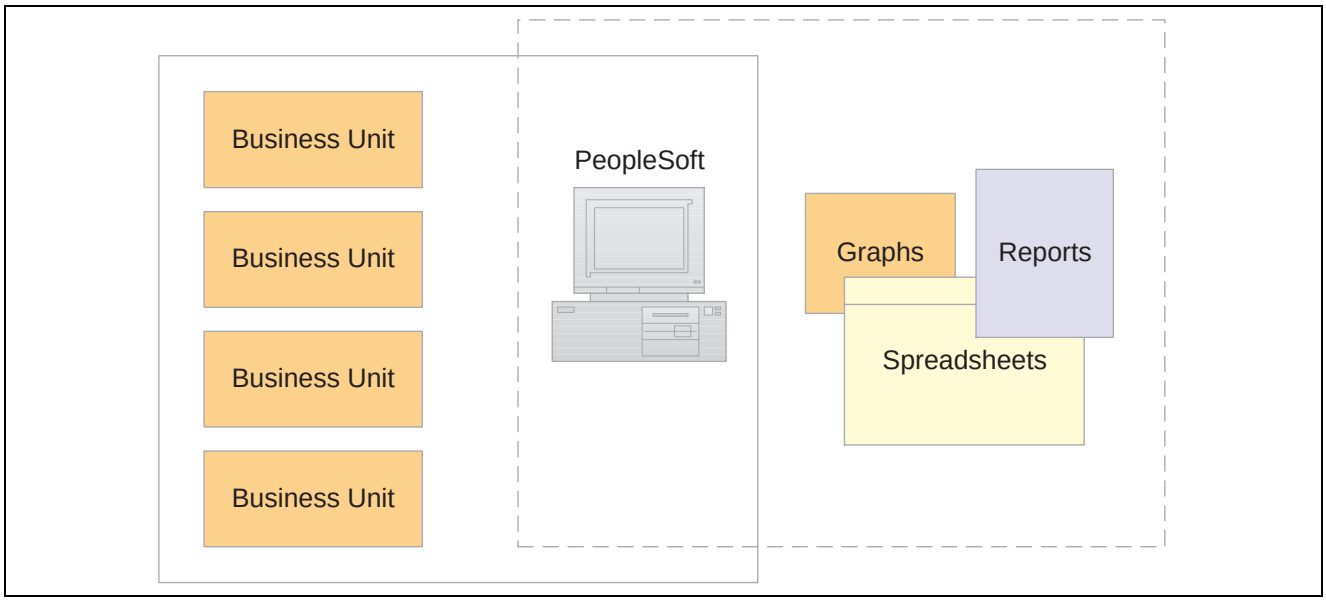
In a PeopleSoft system, a business unit is an operational subset of an organization. Business units can be independent legal entities, or organizations that need to segregate their financial data for accounting purposes, or operational centers that segregate their operations for management purposes.

Business unit names can vary among the different applications within the PeopleSoft system. For example, PeopleSoft Enterprise Student Financials and PeopleSoft Enterprise General Ledger business units typically consist of different entities for financial and tax reporting purposes. You can share business units across any combination of applications in Campus Solutions, or you define them within a single application. If the entire institution keeps only one set of books, then you can have a single business unit. You must have one business unit defined for each PeopleSoft application installed, but all applications can share the same business unit. A minimum of one business unit is required for the entire suite of applications in the Campus Solutions system.

How you define a business unit depends on the institutional structure, requirements, or reporting demands, as well as how you've organized operating responsibilities. For example, an institution might separate technical or graduate school operations from its main campus operations. Transactions are stored by business unit. Reports and processes are requested by business unit and security can be enforced by business unit.

Although each business unit keeps its own set of books, the institution can still maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit and ensuring consistent and accurate consolidated results. In addition, you can produce reports across business units, enabling you to obtain a broad overview or to compare detailed information.

This diagram illustrates how centralized data enables analysis and reporting across business units:



Benefits of centralized data

Understanding Data Sharing Among Business Units

The PeopleSoft system uses business units to separate organizations within the institution. Although each business unit represents a separate organization, there is data that is shared throughout the institution. Business units can share data by using tableset sharing, which is a way to share control table information among business units to minimize redundant data and system maintenance tasks.

This section discusses:

- Tableset sharing.
- Control tables keyed by tableset ID.
- Record groups in tableset sharing.
- Business units, tablesets, and record groups.
- Set control values.
- Data sharing.

Tableset Sharing

Tableset sharing is the sharing of common control tables among business units. There are two types of tables in the PeopleSoft system that are used to store data.

Control Tables

These tables store master lists of information; for example, department names and account codes. This data is maintained centrally by the institution and is generally entered once at implementation, and it changes little over time.

The structure and processing rules for each of the PeopleSoft applications you are using are defined in a series of control tables.

Control tables are usually keyed by tableset ID and are usually effective-dated.

Transaction Tables These tables store day-to-day business activity and are updated frequently. They are keyed by business unit.

Control tables enable you to use *tableset IDs,* which make tableset sharing possible. The tableset ID indicates which of the rows in the control table a particular business unit can access. Each row in the control table has a tableset ID associated with it and business units are associated with tableset IDs through record groups:

Business units and tableset IDs associated through record groups

Note. The *tableset ID* is also referred to as the *setID*. These terms are interchangeable.

If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information among business units instead of having to enter the same data multiple times. For example, suppose that an institution has 10 business units and they all use the same accounts. Instead of having to enter all of the accounts 10 times, you could enter them once and set up tableset sharing to enable all of the business units to access them.

Tableset sharing also enables you to manage exceptions within the organization. For example, suppose that 9 of the 10 business units use the same accounts, but the tenth business unit uses entirely different accounts. This is easily accommodated through tableset sharing.

The two following tables show how different business units access a centralized control table based on tableset ID. In the example, there are three tableset IDs—MAINC, EASTC, and WESTC—representing three campuses. The account number information for all campuses is contained in a single control table. Allowing access to certain tableset IDs can restrict access to the account number information. For example, East Campus (EASTC) can view only its two account numbers when it accesses the control table.

Here are the accounts for all three campuses:

Tableset ID	Account Number
MAINC	0000090345
MAINC	0000090346
EASTC	0000090347
MAINC	0000090348
EASTC	0000090349
WESTC	0000090350

This view shows only the accounts for East Campus:

Tableset ID	Account Number
EASTC	0000090347

Tableset ID	Account Number
EASTC	0000090349

See Also

Enterprise PeopleTools PeopleBook: Data Management, "PeopleTools Utilities"

Control Tables Keyed by Tableset ID

Here are some examples of the control tables keyed by tableset ID for each application in Campus Solutions. This information can help you decide how the data can be segmented, so that you make the correct decisions when setting up the tableset IDs and assign the correct tableset IDs to record groups.

Note. This list is not exhaustive.

This table lists some examples of control tables keyed by tableset ID:

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Records	FACILITY_TBL - Facility LOCATION_TBL - Location GRADESCHEME_TBL - Grading Schemes LVL_LD_RULE_TBL - Level/Load Rules PROG_RSN_TBL - Program Action Reasons REPEAT_SCHM_TBL - Repeat Schemes TIME_PERIOD_TBL - Time Periods UNIT_CONVR_TBL - Unit Conversions

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Financials	ACCT_TYP_TBL_SF - Account Types ACC_AGE_FEE_TBL - Aging Late Fee table ACC_AGING_TBL - Account Aging table ADJ_CODE_TBL - Adjustment Code table ADJ_REASON_TBL - Adjustment Reason table ADJ_TERM_CD_TBL - Adjustment Term Code table ADJ_TERM_TBL - Adjustment Term table AGING_CAT_TBL - Aging Category table AGING_TBL - Aging table APP_FEE_CD_TBL - App Fee Code table APP_FEE_TBL - Application Fee table APP_FEE_TND_TBL - App Fee Tender and Item Types APP_SF_CD_TBL - App Sub-Fee Code table APP_SUBFEE_TBL - App Sub Fee table BANK_ACCT_MTHD - Bank Account Payment Method BI_ACCT_STD_REQ - Accounts for Std Req BI_ACDPROG_STAT - Std Req Academic Prog Status BI_ADMPROG_STAT - Std Req Admissions Prog Status BI_BILL_MSG_TBL - Billing Msg table for SF BI_CAR_STD_REQ - Career for Std Req BI_COM_STD_REQ - Communication Std. Request BI_IVC_FIELDS - Billing Invoice Field table BI_IVC_LAYOUT - Billing Invoice Layout BI_MSG_CAT_TBL - Billing Message Cat table BI_PRINT_RQST - Billing Standard Print Request BI_REQ_MSG - Billing Request Message BI_STD_REQ_GRP - Billing Student Groups BI_STD_REQ_TBL - Billing Standard Request table BI_TERM_STD_REQ - Terms for Std Req BI_TYPE_TBL - Billing Type table BNK_RCN_INP_LAY - Bank Recon Input File Layout

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Financials (cont.)	BNK_RCN_INP_TRN - Bank Transaction Code CALC_CNTL_SESS - Tuition Calc Control Sessions CALC_CNTL_TBL - Tuition Calculation Controls CALC_CNTL_TERM - Tuition Calc Control Terms CALC_ON_REFUND - Calc on Refund Control CLASS_FEE_TBL - Class Fee table CLASS_SBFEE_TBL - Class Sub Fee table CLST_FEE_TBL - Course Fee table CLST_SUBFEE_TBL - Course Sub Fee table CLS_CANCEL_SF - Class Cancellation Code table COLL_LTRITM_TBL - Collection Letter Item table COLL_LTRTMP_TBL - Collection Letter Template table CO_VOID_RSN_TBL - Void Reasons CREDIT_CARD_TYP - Credit Card Type CRSE_FEE_ID_TBL - Course Fee ID table CRSE_FEE_TBL - Course Fee table CRSE_LST_DTL_SF - Course List Detail CRSE_LST_HDR_SF - Course List Header CRSE_RATE_TBL - Course Rate table CRSE_RT_ID_TBL - Course Rate ID table CRSE_SUBFEE_TBL - Course Sub Fee table DEP_DUE_DT_TBL - Deposit Date table DEP_FEE_CD_TBL - Deposit Fee Code table DEP_FEE_TBL - Deposit Fee table DEP_FEE_TRM_TBL - Deposit Fee Term table DISP_ERR_CNTL - Display Error/Warn Control DUE_CODE_TBL - Due Date Code table DUE_DATE_CD_TBL - Due Date Code table DUE_DATE_TBL - Due Date table

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Financials (cont.)	EG_PROJECT - E&G Operational Projects FEE_CLASS_TBL - Fee Class table FEE_TBL - Fee table FINCODE_TBL - FinCode table GL_INTERFACE - General Ledger Interface GL_INT_CD_TBL - General Ledger Dummy Parent GL_INT_DT_TBL - General Ledger Dummy Parent II GROUP_TYPE_SF - Group Type GROUP_TYPE_TBL - Group Type ITEM_ACCT_TYPE - Valid Account Types ITEM_AGG_TBL - Item Aggregate table ITEM_FA_CD_TBL - Item Type Code table ITEM_GROUP_DTL - Item Type Group Details ITEM_GROUP_TBL - Item Type Group table ITEM_TYPE_1_TBL - Item Type Control table ITEM_TYPE_FISCL - Fiscal Item Type table ITEM_TYPE_FNOTE - Fiscal Item Type Notes table ITEM_TYPE_TBL - Item Type table JRNLGEN_DEFN - Journal Generator Definition LATE_FEE_AGING - Late Fee Aging Category table LATE_FEE_CD_TBL - Late Fee Code table LATE_FEE_LOAD - Late Fee Acad Program table LATE_FEE_PROG - Late Fee Acad Program table LATE_FEE_SCHEME - Late Fee Scheme table LATE_FEE_TBL - Late Fee Setup table LED_FLDS_SF_TBL - ChartFields LED_FLDS_TBL - ChartFields LED_SF_TBL - ChartFields Parent Rec LINE_REASON_TBL - Line Reason table

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Financials (cont.)	MAX_FEE_ADM_TRM - Max fee for Admit Term MIN_MAX_FEE - Min/Max fee table MIN_MAX_FEE_CAR - Min/Max fee for Acad Career MIN_MAX_FEE_PGM - Min/Max Fee for Acad Program MIN_MAX_FEE_SES - Min/Max Fee for Session MIN_MAX_FEE_TRM - Min/Max Fee for Term MIN_MAX_FEE_YR - Min/Max Fee for Academic Year OPT_FEE_CAR - Optional Fee Careers OPT_FEE_CD_TBL - Optional Fee Codes table OPT_FEE_TBL - Optional Fees table OPT_FEE_TERM - Optional Fee Terms OPT_FEE_TRM_EF - Optional Fee Effdts for a Term OPT_FEE_TRM_LD - Optional Fee Academic Loads OPT_FEE_TRM_VAL - Optional Fee Values for a Term OPT_FEE_VAL - Optional Fee Values ORIGIN_TBL - Group & Deposit Origins PAY_PRIOR_ALL - Payment Priority Overall PMT_CHRG_PRIOR - Payment Charge Priority PMT_CHRG_TBL - Payment Charge Priority table REASON_IN_TBL - SF Reason In REASON_OUT_TBL - SF Reason Out SEC_ITEM_CLS - Item Security - Perm List SEC_ITEM_OPR - Item Security - User Data SEC_SETID_CLS - User ID Access to SetIDs SEC_SETID_OPR - User ID Access to SetID SEL_VALID_FIELD - Selector Group Valid Fields SEL_VALID_RECS - Selector Group Valid Records SEL_VALUE_OLD - Selector Values table SF_ACCT_CLASS - SF Account Class SPEEDTYP_TBL - Speed Types SPEED_USER_TBL - Work Table for Speed Types

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Student Financials (cont.)	TAX_AUTHORITY - Tax Authority Detail Info TAX_AUTH_HDR - Tax Authority Header Info TAX_CD - Tax Authorities in a Tax Code TAX_HEADER_TBL - Tax Code Header Information TERM_FEE_RES - Term Fee Resident table TERM_FEE_TBL - Term Fee table TERM_FE_CD_TBL - Term Fee Code table TERM_SF_CD_TBL - Term Sub Fee Code table TERM_SUBFEE_TBL - Term Sub Fee table TP_STATUS_TBL - Third-party Contract Status TRANS_FEE_HDR - Transaction Fees Header TRANS_FEE_TBL - Transaction Fees TRANS_FE_CD_TBL - Transaction Fee Codes VALID_RECORD_SF - Valid Records for Selectors VENDOR_SF_TBL - SF to Vendor interface table WAIVER_CODE_TBL - Waiver Code table WAIVER_FORM_TBL - Student Waivers WAIVER_GRP_DTL - Waiver Group Detail table WAIVER_GRP_TBL - Waiver Group table WAIVER_TBL - Waiver table WVR_GRP_CD_TBL - Waiver Group Code table
PeopleSoft Enterprise Recruiting and Admissions	PSTREEDEFN - PeopleTools table used in the creation of the Region Tree

PeopleSoft Application	Control Tables Keyed by Tableset ID
PeopleSoft Enterprise Financial Aid	AWD_MESSAGE_TBL - Award Messages/Comments BDGT_REGION_TBL - Budget Region table ITEM_TP_FA_DISB - Item Type Disb Plan/Split Cd ITEM_TYPE_FA - Item Type Table SFAG ITEM_TYP_FA_FEE - Item Type Fee table ITM_TP_TERM_LMT - Award Limits by Term Type LN_FEE_TBL - Loan Fee table LN_ITEM_FEE - Loan Item Type Fee table LN_ITEM_TBL - Loan Item Type table RSTRC_AID_ITEM - Restricted Aid IDs/Item Type
PeopleSoft Enterprise Contributor Relations	AV_ACCOUNT_TBL - Designation Funds AV_INST_TYP_TBL - Designation Types AV_ITEM_TBL - Donor Appreciation Items AV_MBR_CAT_TBL - Membership Categories AV_MBR_TYP_TBL - Membership Types AV_MTVTN_INTV - Appeals linked to Initiative Codes AV_MTVTN_TBL - Appeal Codes AV_ORIG_DNR_TBL - Original Donors to Designation Funds AV_TENDER_TBL - Tender Types AV_TRIB_TBL - Tributes on Designation Funds

Record Groups in Tableset Sharing

A record group is a set of functionally or logically related records or views based on how the records are used in the system. A record group can contain a single record or view, or it can contain many records and views. Record groups are delivered as part of the PeopleSoft system and should not be altered.

When you create a business unit, that business unit is automatically linked to each record group in the system that you are using.

Record groups exist for two purposes:

- To save time in data entry.

  With record groups, tableset sharing can be accomplished quickly and easily instead of requiring redundant data entry.

- To provide consistency in the data.

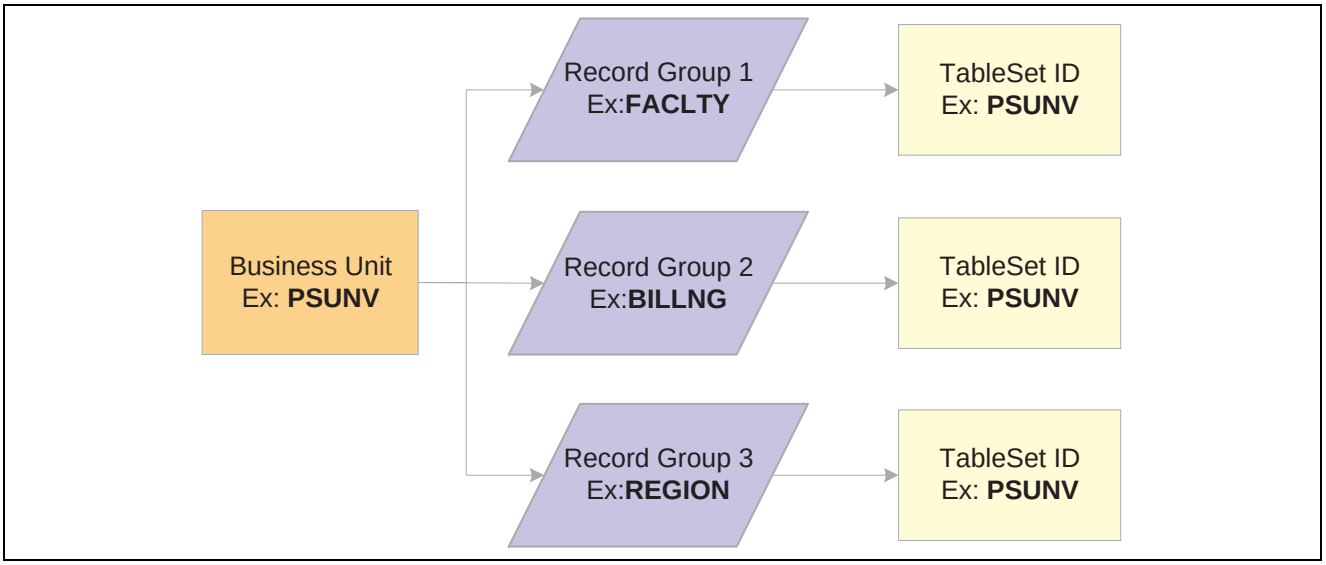
Record groups ensure that tableset sharing is applied consistently across all related tables and views in the system.

Business Units, Tablesets, and Record Groups

When you create and then save a business unit, a new tableset ID with the same name as the business unit is created. The system automatically assigns that tableset ID to each record group for the new business unit.

Note. PeopleSoft suggests that you create tableset IDs and business unit names that are five characters long. A performance degradation occurs if the tableset IDs or business units have fewer than five characters.

This diagram illustrates the relationship between business unit, record group, and tableset ID:



Relationship between business unit, record group, and tableset ID

Tableset IDs are the labels that the system uses to identify tablesets. You can have as many tableset IDs as you like, but the more you have, the more complex tableset sharing becomes. You always have the same number of tableset IDs as tablesets.

Warning! You must define at least one complete set of these tables—a tableset—for the Campus Solutions system to function.

Note. You must create at least one tableset ID, even if you are not taking advantage of tableset sharing. Some institutions need only one tableset ID and one business unit.

When you set up the control tables in the system, you'll notice that the tableset ID, or additional primary key, enables the sharing of control table information across business units. If you prefer, you can create a unique set of tables for each new business unit. Either way, tablesets form the building blocks of the system. You populate the individual tables in the tableset according to your particular business rules.

You can also rearrange tablesets by updating tableset assignments for a business unit in the Utilities - TableSet Controls component. A tableset is a group of control table rows identified by the same tableset ID.

You are not required to share all tables in a tableset. With Campus Solutions, you can share any combination of tables with any number of business units, according to your needs. Use the pages in the component to identify, for each business unit, which data is shared and how it is shared.

Tableset sharing can be extremely easy for an organization to design. In fact, it is almost entirely set up by the time you have finished creating the business units.

When defining tableset IDs for Contributor Relations, you must manually create a setID in the tableset ID record, if one does not already exist that matches the Contributor Relations business unit.

Set Control Values

Tablesets are identified by a set control value. The set control value is also a tableset ID. The set control value used to identify a tableset is not the same as the tableset ID that PeopleTools uses to retrieve the data from the tables in the database. Sometimes the set control value is the same as the tableset ID, but other times it is not.

Here is an example of how this works. Suppose that a community college district has three campuses and a main office:

Community College Office and Campuses	Tableset ID
Community College Main District Office	CCMDO
North Campus	NORTH
West Campus	WESTC
Far South Campus	SOUTH

Two of the campuses share location and facility information, and all three share the grading scheme and level or load rules. Here are the shared record groups:

Record Group	Campuses Sharing Record Groups
FACILITY (Facility table)	North Campus and West Campus
HR_03 (Location table)	North Campus and West Campus
CAREER (Grading Scheme and Level/Load tables)	North Campus, West Campus, and Far South Campus

This table shows how set control values and tableset IDs are used to identify which rows appear in prompt boxes:

Set Control Value	Record Group	Tableset ID
NORTH	FACILITY	NORTH
	HR_03	NORTH

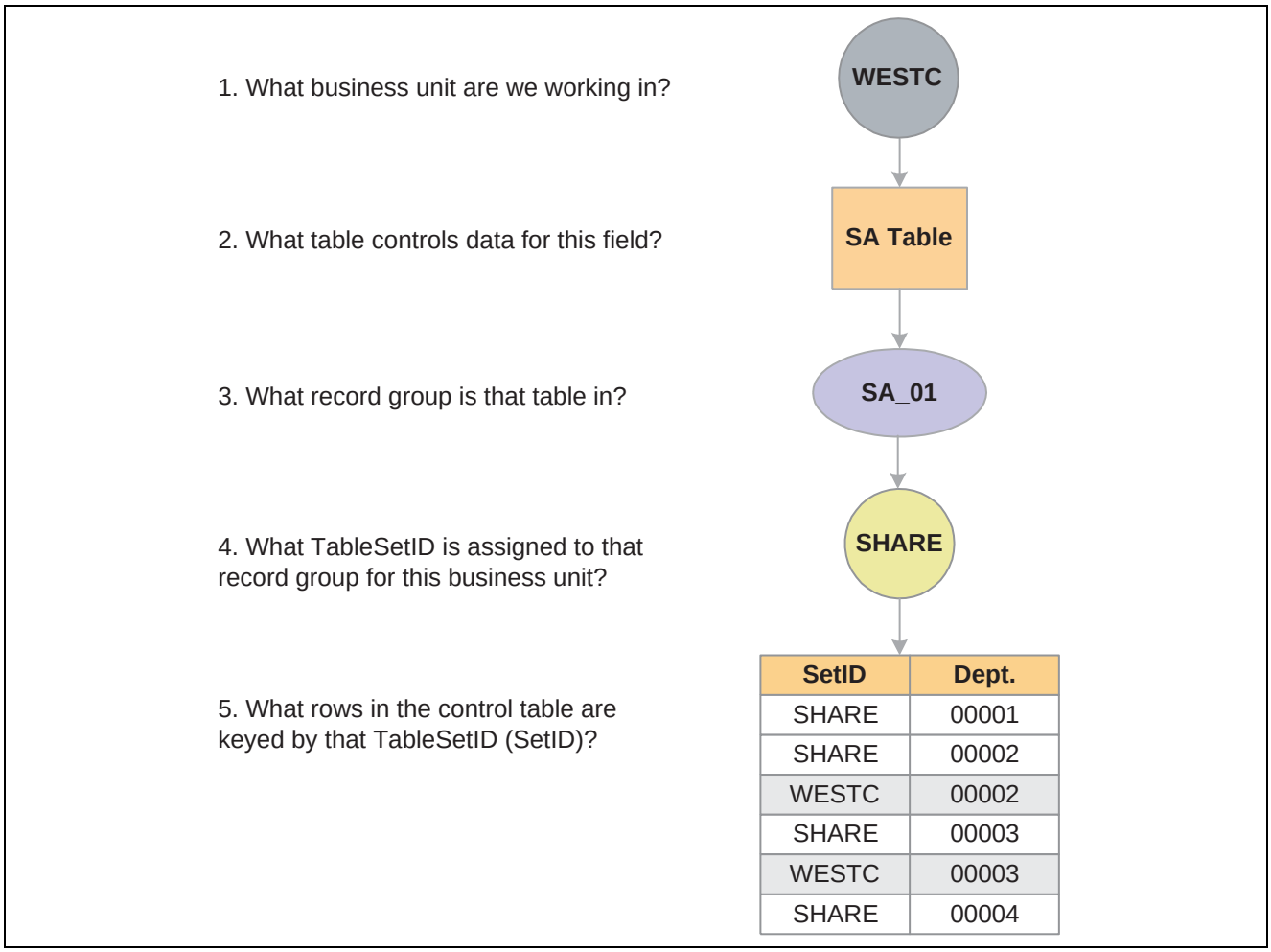
Set Control Value	Record Group	Tableset ID
	CAREER	CCMDO
WESTC	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
SOUTH	FACILITY	SOUTH
	HR_03	SOUTH
	CAREER	CCMDO

Data Sharing

With tableset sharing, you can specify the control table data that the system uses for each business unit. If much of the control table data is the same from business unit to business unit, tableset sharing enables you to share that information, instead of having to enter the same data multiple times.

To understand how this works in the PeopleSoft system, consider what happens when a user makes a selection from the available options. The list that appears contains all of the valid entries that can be entered in the field based on the relevant business unit.

This series of questions outlines the online process that occurs:



Tableset sharing process

Note. Record groups and setIDs for a set control value have a one-to-one relationship.

Selecting a Business Unit Structure

Business units offer a flexible structuring device that you can use to implement each PeopleSoft application based on how the institution is organized. In some institutions, the correspondence between existing structures and the organizational model is obvious. In other cases, it can require careful analysis to determine how to set up the business units so that they reflect the institution and enable you to use the system effectively.

In deciding on the business unit structure for a PeopleSoft application, look closely at the structure in the current system as a starting point. What sort of organizing concepts or categories do you use? Do you still want to use these structures in the PeopleSoft system? To decide where to draw the lines between business units in the institution, you may have to weigh a number of different variables. First, you might consider the question from one perspective, saying, “If I use these criteria, my institution divides into these logical units.” Then you might use different criteria and see if the institution divides into different logical units. As you determine at the optimal business unit structure for the institution, keep in mind that in some circumstances you *must* set up multiple business units and in some cases setting up multiple business units is optional.

Note. Multiple business units are not required for Contributor Relations.

Examine the existing codes and IDs and determine how they might relate to PeopleSoft business units. Consider whether you can make a simple mapping of the existing structures onto business units, or whether you should modify the structures based on the flexibility afforded by the PeopleSoft system.

Note. Work closely with your PeopleSoft implementation partner early in the design to determine how best to define business units for the Campus Solutions system.

Implementing Tableset Sharing

This section provides an overview of tableset sharing implementation and discusses how to:

- Create tableset IDs.
- Review record groups.
- Create business units.
- Assign cross-references for business units.
- Adjust tableset sharing for record groups.
- Adjust tableset sharing by using trees.

Understanding Tableset Sharing Implementation

After you have determined how many business units you need and how you want to organize them, you can create them for the Campus Solutions system, and then implement tableset sharing.

You define tableset IDs for the purpose of administering certain control tables, such as the Department table, in a decentralized way. When you define a tableset ID, consider how to categorize a subset of the control table data. If you want to use multiple tableset IDs to set up tableset sharing for the first business unit that you create—before you have created any additional business units—create tableset IDs on the TableSetID page before defining the business unit.

You can create tableset IDs as you set up the business units. If the default setID that you enter creates a new business unit that does not exist, the system automatically creates it; however, you can also create tableset IDs independent of business unit creation by using the TableSetID page.

To define tableset sharing for the organization, you complete the steps for each of these tasks.

To establish tableset sharing, you:

1. Set up business units.
2. Define record groups.

   You can add new record groups.
3. Define tableset IDs for the organization, to reflect the organization's structure.

   This step is sometimes optional. It is required, however, for Contributor Relations if a setID matching the Contributor Relations business unit does not exist.
4. Update all of the tableset record group controls.

To link tableset sharing and system defaults to permission lists or business units, you:

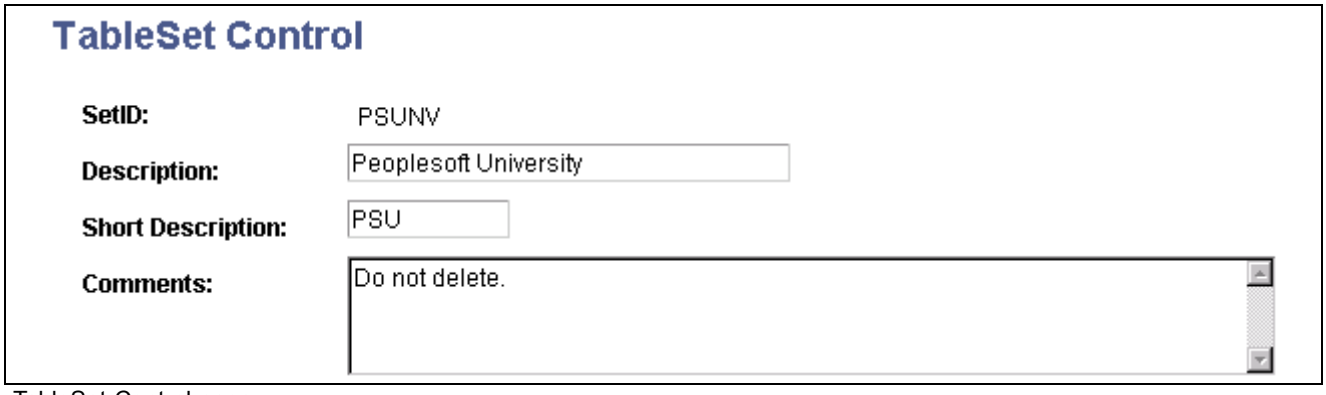
1. Set up Primary Permission List Preference Defaulting options.
2. (Optional) Set up all Business Unit HR Defaulting (business unit human resources defaulting) options.

Pages Used to Implement Tableset Sharing

Page Name	Object Name	Navigation	Usage
TableSetID - TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSetIDs	Create tableset IDs.
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Administration, Record Group	Review record groups to see which tables and views are included in each record group in the system. Record groups are predefined for the system.
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit	Create business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Assign cross-references for business units, to identify business units in other PeopleSoft applications that relate to business units.
Record Group	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, Record Group	Adjust tableset sharing for record groups. Tableset sharing is set up as soon as you create business units; however, you adjust tableset sharing by changing the tableset IDs that are assigned to individual record groups.
Tree	SET_CNTRL_TABLE2	PeopleTools, Utilities, Administration, TableSet Control, Tree	Adjust tableset sharing by using trees.

Creating Tableset IDs

Access the TableSet ID - TableSet Control page.



TableSet Control page

Note. SetIDs should be five characters in length for optimal system performance.

SetID Displays the setID.

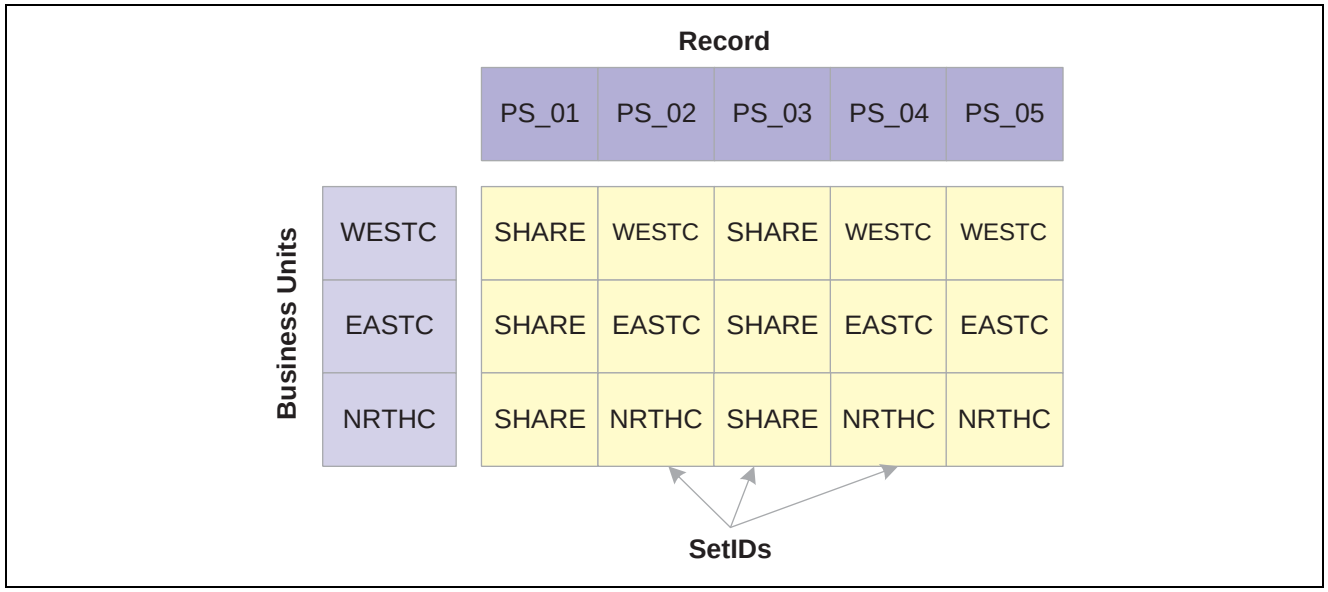
For clarity, you might create one setID (also known as a tableset ID) that does not match any of the business units, and use that setID to key information that is generic throughout the system. Consequently, the rest of the setIDs match the business units with which they are used.

You can create tableset IDs independently or as part of the business unit creation process by using the TableSet ID page. When you add a new business unit to the system, the system automatically specifies a default tableset ID on the Business Unit page that matches the name of the new business unit. If this default tableset ID (with a name matching that of the new business unit) does not already exist, the system automatically creates a new tableset ID with a name that corresponds to the new business unit.

Note. The system creates a tableset ID with the same name as the business unit when you add a new business unit to the system, regardless of whether you choose to use the business unit name as the default setID. Contributor Relations business unit setup does not automatically create a related setID. If you are creating a Contributor Relations business unit that does not already have a matching setID in the tableset ID record, you must create one manually.

To use multiple tableset IDs to set up tableset sharing for the first business unit that you create (before you create any additional business units), create tableset IDs on the TableSet ID page before defining the business unit.

This example illustrates tableset sharing:



Tableset sharing matrix

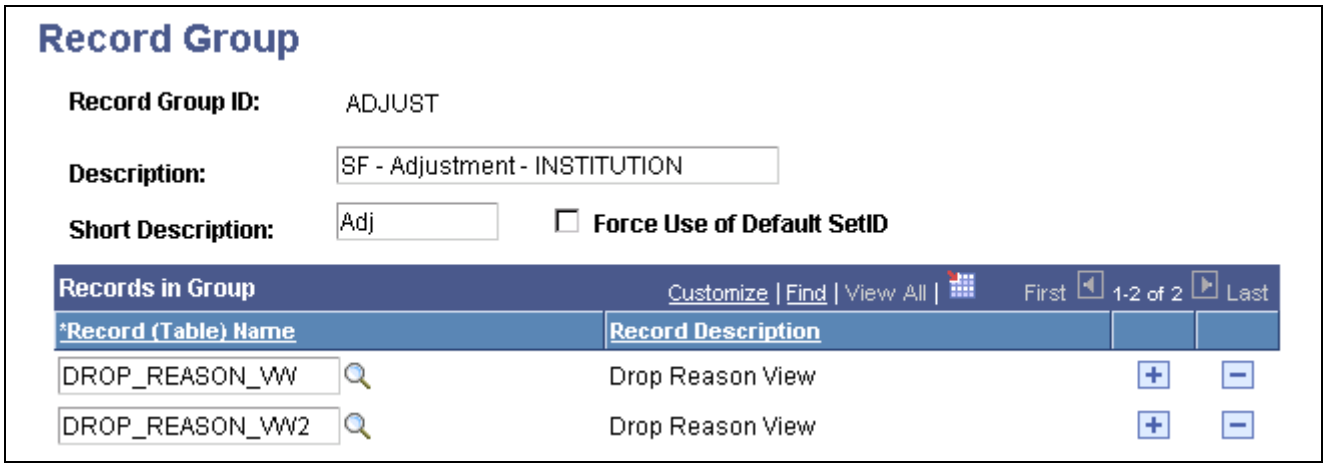
See Also

Chapter 2, “Introducing Business Units and Data Sharing,” Understanding Data Sharing Among Business Units, page 14

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer, “Planning Records, Control Tables and TableSets”

Reviewing Record Groups

Access the Record Group page.



Record Group page

In the record group table, group the record definitions for the tables that you want to share, as well as any dependent record definitions. If you're adding a table to a PeopleSoft application, an appropriate record group may already be defined. But if you are adding new functionality, you may need to add a new record group for the tables that you define.

Warning! Record group definitions and the assignment of the individual tables and views to specific groups are provided to ensure complete and accurate tableset sharing within each functional area. You should not change these record group assignments.

Record Group ID Displays the record group ID.

The name that you give the record group ID should be descriptive enough to encompass a category of related tables, not just the table that you are specifically sharing.

Force Use of Default SetID Select to force the use of the default setID. Set up the default setID on the TableSet Control - Record Group page.

Record (Table) Name Displays the record name of all of the records that are part of the record group ID. Records (tables) are identified by a _TBL extension, and views are identified by a _VW extension.

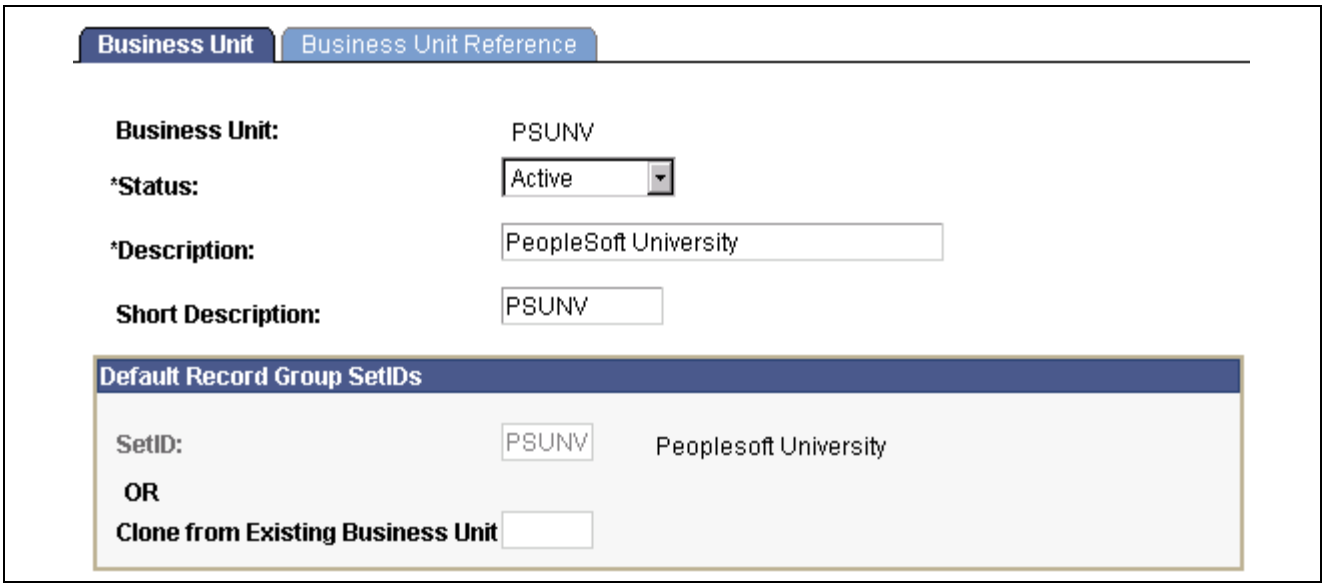
A record group can contain a single table or many tables and views.

Record Description Displays the description of the associated record (table) name.

Note. When you add a new record group ID, the system automatically adds the new record group ID to all current set control values (business units). The default setID for the new record group ID is based on the default setID for each set control value, as defined for that set control value on the TableSet Control - Record Group page.

Creating Business Units

Access the Business Unit page.



Business Unit page

Warning! For optimal system performance, business units must be five characters. Significant performance degradation occurs if the business units have fewer than five characters.

When you define a business unit, you can specify that the system establish default tableset IDs for the business unit by using the Default Record Group SetIDs group box. This indicates to the system which tableset ID is associated with the business unit. The tableset ID determines the preliminary tableset sharing for the business unit by associating the business unit with a record group.

Status Select a status. Business units are not effective-dated, so use this field to implement or retire business units.

Default Record Group SetIDs

SetID Enter an existing tableset ID to be used with the business unit. When you're adding a new business unit to the system, the system automatically populates this field with the same name as the new business unit.

For example, if the business unit is called MAINC, then the setID appears by default as MAINC. You can override the setID as necessary.

Clone from Existing Business Unit Enter a business unit code. With this feature, you can clone the tableset sharing setup of an existing business unit. When the record groups are linked to the new business unit, the system assigns each record group the same setID that is used for the record group by the business unit that you selected as the clone unit.

For example, you can use this field to have the tableset sharing for the new business unit mirror that of another business unit, or to make the two business units similar except for a few record groups.

Note. When you first access the Business Unit page, the Clone from Existing Business Unit option is cleared. To activate the option, clear any setID values from the SetID field, and exit the field.

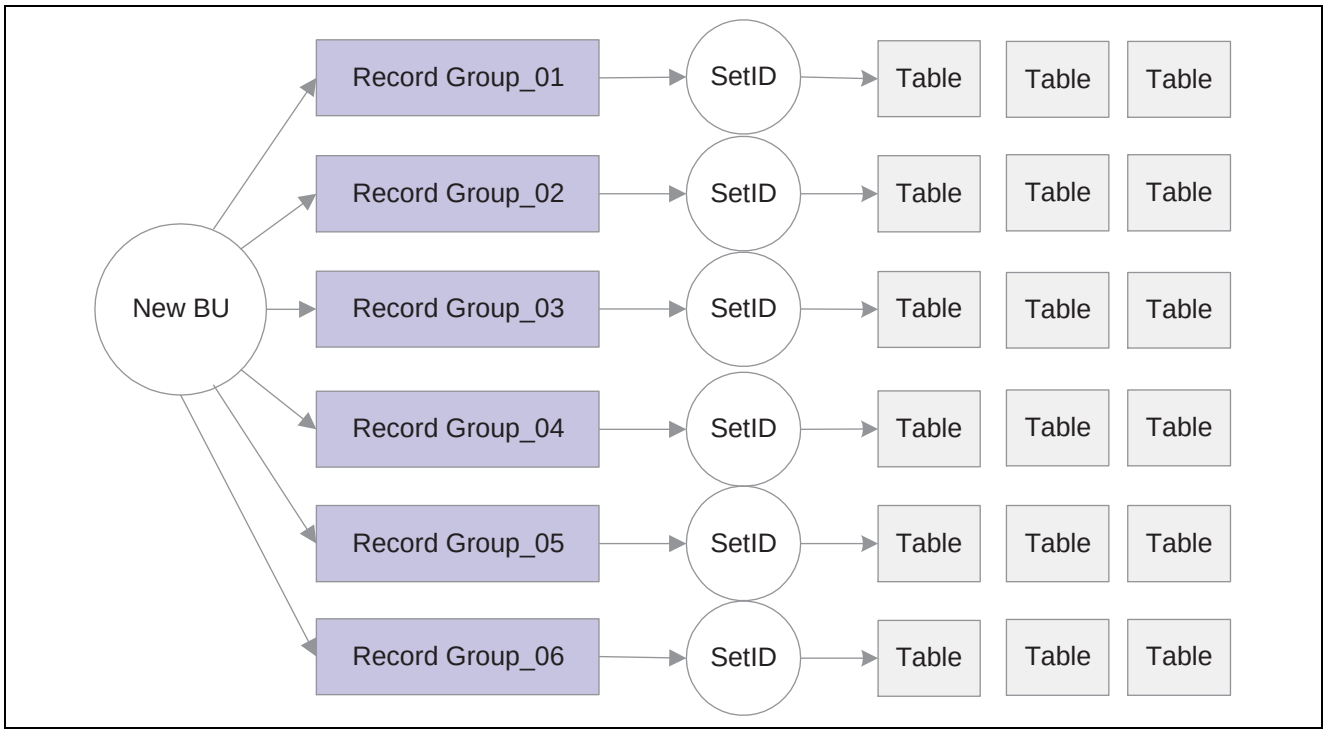
Note. When you save a new business unit for the first time, the system makes the default setID or clone unit unavailable for entry. You cannot change the default record group setID information for this business unit again. This rule prevents you from accidentally overwriting the tableset record group controls for the defined business units.

When you add a new business unit and save the page, the system creates all of the appropriate table values provided by PeopleTools that connect the business unit ID, record group ID, and setID.

See *PeopleSoft Enterprise Student Financials 8.9 PeopleBook*, "Completing Student Financials General Setup," Setting Up Business Units.

Example of Business Unit and Tableset ID Association

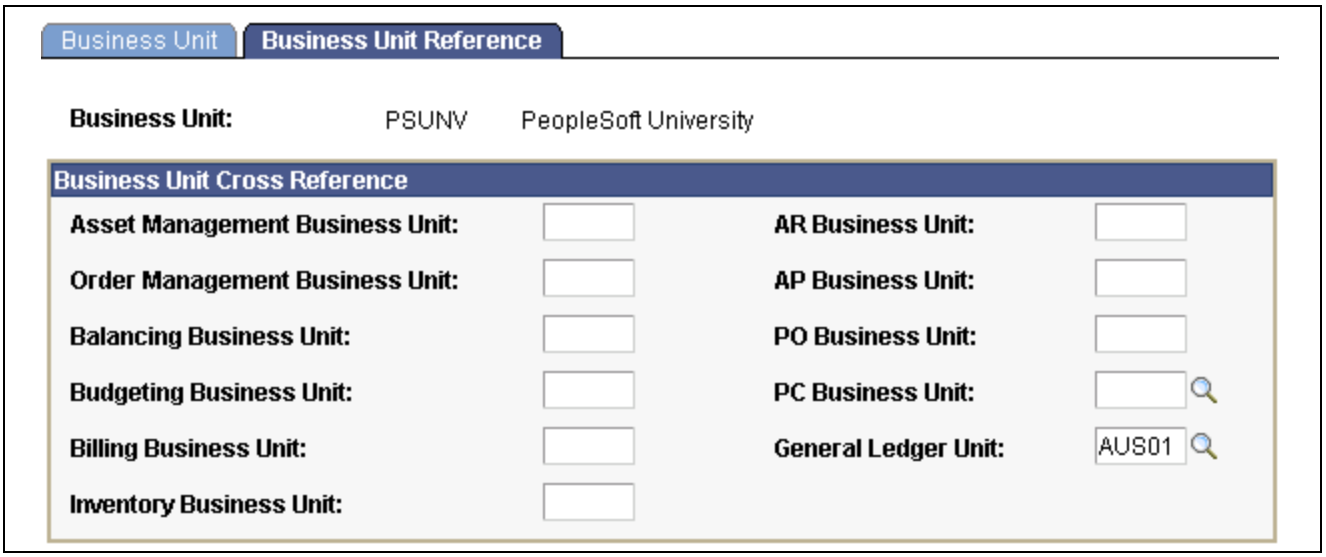
This diagram shows how the business unit, record groups, and tableset ID are associated. The business unit and tableset ID can have the same value:



Tableset sharing

Assigning Cross-References for Business Units

Access the Business Unit Reference page.

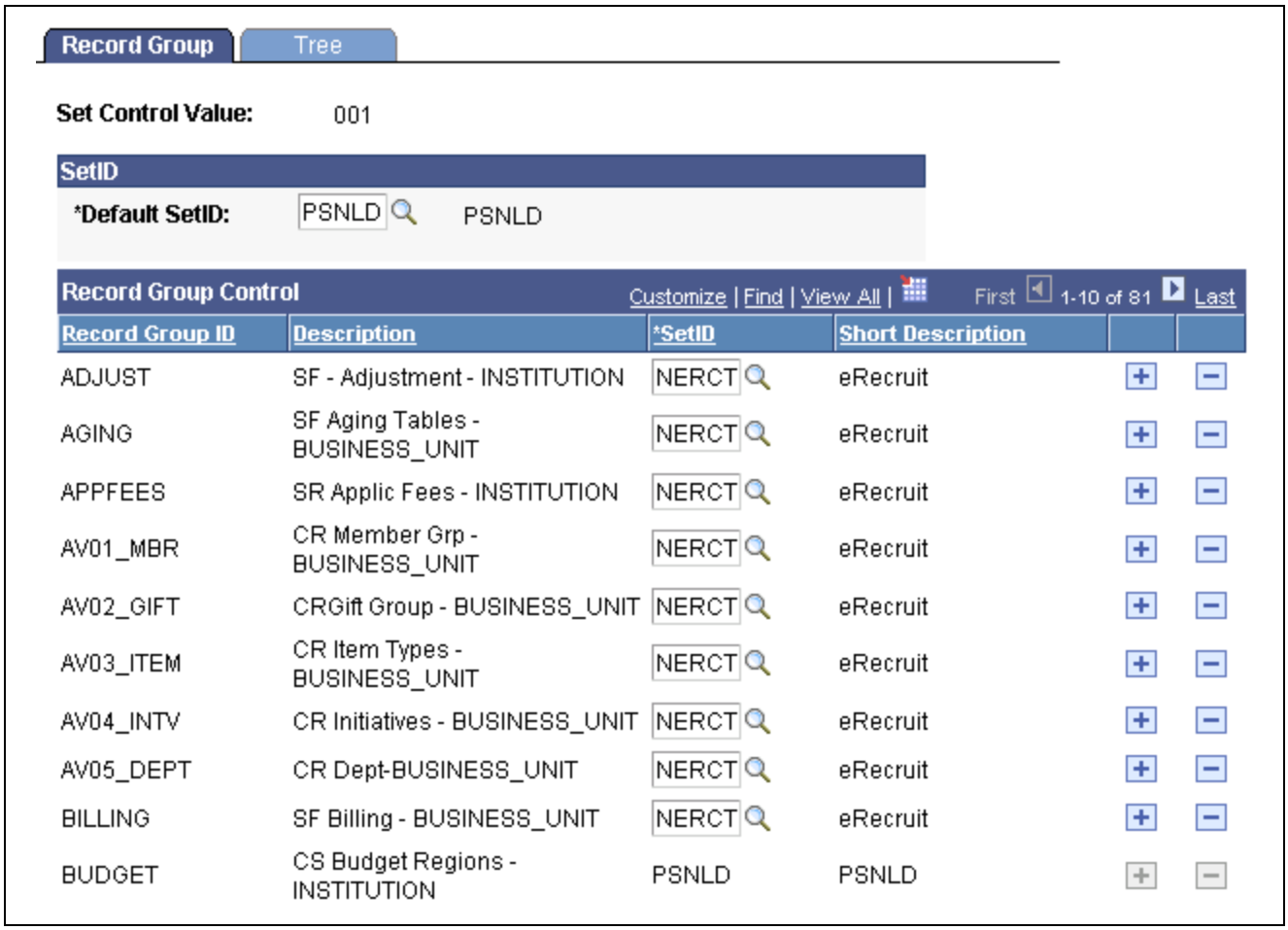


Business Unit Reference page

Indicate the business unit cross-reference, if applicable, for any of the PeopleSoft applications listed on the page. You can identify business units in other PeopleSoft applications that relate to the business unit.

Adjusting Tableset Sharing for Record Groups

Access the TableSet Control - Record Group page.



TableSet Control - Record Group page

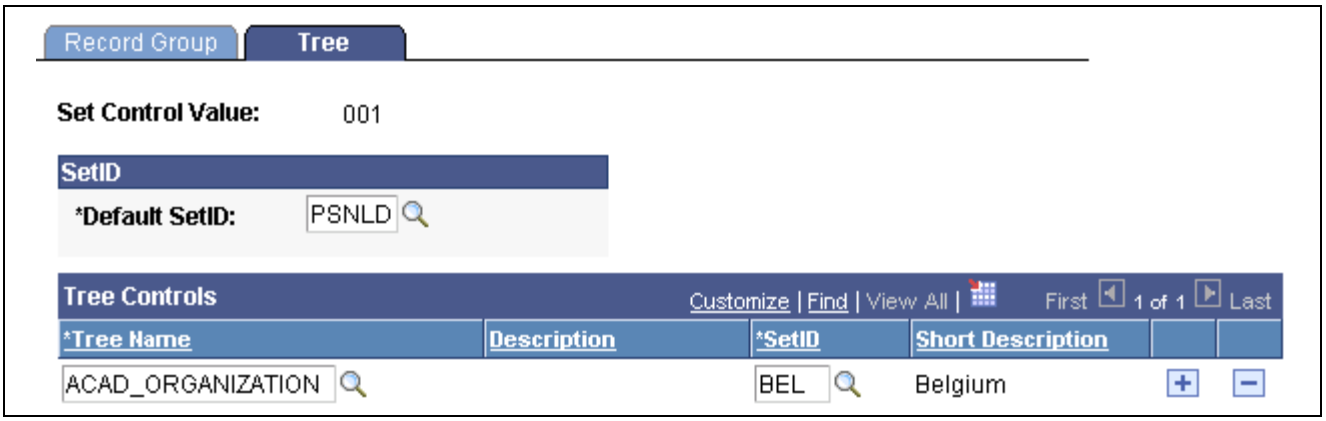
Default SetID Select the default setID to use for the set control value. The default setID is the tableset ID that the system uses when you add additional record definition groups to be shared within this tableset. If you have the system require a default setID (by using the Record Group page), then you cannot change the setID for the record group with a setID that is different from the default setID that you indicate here. The setID for that record group ID becomes unavailable for entry.

Remember, most record groups contain a number of tables and views. The tableset ID that you assign to that record group *must* represent the information that you want to use from each of the control tables contained in that record group.

SetID For each record group ID, enter the setID to use.

Adjusting Tableset Sharing by Using Trees

Access the TableSet Control - Tree page.



TableSet Control - Tree page

Default SetID Displays the default setID assigned to the field value. If you created another tableset for sharing trees, you can change this value.

Tree Name Select the tree definitions that are defined with the same set control field.

SetID Select the appropriate setID.

CHAPTER 3

Preparing for Data Conversion

This chapter provides an overview of data conversion and discusses how to:

- Perform data conversion.
- Convert Recruiting and Admissions and Campus Community data.
- Convert Financial Aid data.
- Convert Student Records data.
- Convert Student Financials data.
- Convert Contributor Relations data.

Understanding Data Conversion

Conversion of data from an existing system is one of the most challenging and critical tasks that you accomplish while installing the Campus Solutions system. The conversion task takes preparation and planning, a programming effort, and robust testing.

Because of many factors—amount of data to convert, business practices, institutional schedule—much of the decisions as to when, how much, and even the method of converting historical data is ultimately up to you. The more you convert the better the new system becomes, but the more challenging the conversion task is. This section contains some best practice recommendations for converting data into Campus Solutions; however, the information presented here is not exhaustive.

Consider these tasks:

- Explore Campus Solutions thoroughly before you convert any data.

  Mapping the data to existing fields in PeopleSoft is a step that requires you to know the system in depth. Take advantage of documentation and training available.

- Completely scope the project before starting an implementation and conversion.

  An institution should develop a well-defined scope or implementation plan—including information such as the full extent of the conversion, how much data to convert, and the timing of each phase of data conversion—before starting the project. This plan should have the approval or buy-in of the institution's management team, the project team, and the partners or PeopleSoft consultants with whom you are working.

- Test, test, test.

  It is critical that you test the processes thoroughly in an environment where you can catch errors before you convert the data.

- Plan a conversion schedule.

Because Campus Solutions is a fully integrated system with multiple applications, it is important to plan which applications are converted in a specific order. You may convert the data any way you want, but this chapter suggests how to maximize the system, and hopefully, minimize any challenges you may encounter during conversion.

There are as many ways to plan a conversion as there are universities. So it is a unique process based upon the legacy system, your needs, and how you do business. PeopleSoft suggests that you:

- Select go-live dates (or a go-live term) for fall term, not mid-year.

  If you do choose a spring term as the go-live term, you may run into some serious problems. For example, in the case of PeopleSoft Enterprise Financial Aid, the financial aid cycle starts months before the fall term. The Financial Aid office awards financial aid starting in the March and April time frame for the fall semester. So, timing the implementation drastically impacts the amount of data that needs to be converted as well as the complexity of the conversion process. Work closely with partners, consultants, and account managers to determine the best go-live dates for the institution.

- Convert names, addresses, and personal information first and as early as possible.

  From there you can choose the order of the conversion of each application. PeopleSoft suggests that you convert PeopleSoft Enterprise Recruiting and Admissions and Financial Aid, then PeopleSoft Enterprise Student Records and PeopleSoft Enterprise Student Financials. If you are using PeopleSoft Enterprise Human Resources applications in addition to Campus Solutions applications, it is critical that you coordinate the name, address, and personal information conversion process with the Human Resources conversion team, thereby reducing the amount of cleanup required and the duplicity and conflict of data when the data is converted.

- Select an effective date that is adequate for your own history.

  This issue can particularly arise in Student Records.

Performing Data Conversion

This section provides overviews of the conversion process and referential integrity and discusses how to:

- Map data for conversion.
- Prepare data for conversion.
- Verify converted data.
- Use data dictionaries.
- Use data load programs.
- Keep systems in sync.
- Estimate disk usage space.

See Also

Enterprise PeopleTools PeopleBook: Data Management

Understanding the Conversion Process

Here is a review of the scope of the conversion process, so that you can gain an understanding of the phases involved:

- Decide how much data to convert.

  You may choose to convert a different amount of data for each application. You may want to convert 10 years' worth of student records data, two years of admissions data, two years of financial aid data, and so on.

- Map data to PeopleSoft data fields.

  To effectively plan a conversion, dig into the old system and identify that one obscure field on that one obscure table and figure out how it maps into the new PeopleSoft system. In some cases, it is difficult, and at times impossible, to map all the codes and tables from the legacy system directly to PeopleSoft tables. In addition, think about the impact that these legacy fields or codes have on reports generated by the PeopleSoft system.

- Export the data, using a Structured Query Report (SQR) or another method to interim tables.

  Use the interim tables to review and clean up the data before moving it to the PeopleSoft system. Corruption of data often is the result of data entry errors. You do not want to move corrupt data from the old system to the new PeopleSoft system.

- Import the data using an SQR.

Understanding Referential Integrity

An important topic to consider and test for as part of the conversion effort is referential integrity. You can convert a lot of data into the correct tables, but the overall system may not have the necessary connections. If you use the normal posting processes in the various applications to convert most of the legacy data, you should not have referential integrity problems because those processes contain many of the necessary referential integrity rules.

An example in Student Financials is third-party contract information. If you link a third party or a transaction to a contract, the contract needs to exist. However, if the conversion neglects to convert contracts, then a referential integrity problem can occur.

Mapping Data for Conversion

When you map data, you are identifying legacy system data and redefining it in PeopleSoft record definitions. This step can be performed while setting the conversion timeline; however, your data mapping efforts will be more focused if the conversion time line has been set.

Issues to consider when mapping data include defining the amount of historical data to be converted, code validation, workflow, reporting, and other processes. The amount of historical data converted may vary across PeopleSoft applications. The complexity of how the legacy system stores history may contribute to less history mapped into the PeopleSoft system. With code validation, valid codes for the institution may have changed over time, and this too must be considered in the conversion effort.

To map data for conversion:

1. Define each legacy data element.
2. Determine if the legacy data element is pertinent to the implementation scope.
3. Map the legacy data element to the Campus Solutions data element.
4. If the legacy data element cannot be mapped directly within your Campus Solutions product line, determine if the legacy data should be tracked any more or if it could be tracked in another PeopleSoft product line, such as PeopleSoft Enterprise Human Resources Management.
5. Reformat the legacy data to fit the Campus Solutions field size, format, data type, and so on.

   If certain legacy data cannot be reformatted, indicate those as gaps in the gap analysis.

Spreadsheets are helpful tools when mapping data. At a minimum, these spreadsheets should include the legacy system data source (if data comes from more than one source), the legacy system data element and data type, the specific Campus Solutions or Contributor Relations record, and the specific field and data type in that record. Optional description fields might include related prompt tables, conversion translation values, and legacy system data position.

Another option is to build a mini-application using PeopleTools to map data. You can build Structured Query Language (SQL) views to link various PeopleTools tables together, such as PSRECFIELD and PSRECDEFN, which creates a robust method of identifying field attributes. You can create special reports to identify key fields, required fields, or legacy system data not yet mapped.

Preparing Data for Conversion

After you have identified the legacy data to be converted, you must prepare it for conversion. For example, when coming from the legacy system, data may be packed in EBCDIC format. These fields should be reformatted into a conversion-ready unpacked flat file in ASCII standard format. Usually, a COBOL program is written and run on the database server to create a file placed on the legacy system.

Conversion-ready data does not have to reside in a single file. The program may be designed to create multiple files during the formatting process, with each file only containing data pertinent to a single or related set of Campus Solutions or Contributor Relations destination tables. Smaller file sizes are more manageable and result in faster conversion processing. Also, the data preparation program itself may be broken into multiple programs based on the destination table.

One of the largest time-consuming tasks of the conversion project can be data cleanup. One way to minimize this task is to clean up the data before importing it into the PeopleSoft system. This can be done by using the data preparation and extract program. This program contains more logic to ensure data validity and therefore takes a longer time to program and test, but the program reduces processing time during the data cleanup.

Another option to reduce the data cleanup effort for the conversion team is to create reports for review by appropriate functional experts, technical experts, employees, and managers. These reports can be used for data verification and correction before the data is entered in the database. Correct invalid legacy data before preparing for conversion.

Not all data conversion must occur through background programs. You may determine that online application data entry is necessary for prompt tables and other required PeopleSoft tables for which there was no legacy data.

Verifying Converted Data

After data has been converted to the PeopleSoft system, you must verify the data and check its integrity. Two methods are online verification and batch verification. Data verification must be performed to clean up invalid data that may not have been keyed, required, or validated in the preparation or conversion processes. This process can also identify and clean up duplicates in the legacy system before you finish converting and mapping the data to the new PeopleSoft tables.

You can write batch programs or SQL scripts to check for parent-child relationships and other validation checking. Writing the batch programs requires more time commitment but can quickly check more records.

Online data verification is less exact than the background process, because records are randomly accessed and require a longer amount of time. However, online data entry can be used to enter nonrequired data or supplemental data that was not available from the legacy system.

Using Data Dictionaries

PeopleSoft does not issue a data dictionary as part of its documentation. PeopleTools provides the ability for online documentation of page and field relationships. The development team documents its material as much as is feasible online in PeopleTools. You can write an SQR that provides all the data dictionary information that you need.

Using Data Load Programs

After data preparation, design conversion programs that extract the appropriate file layout, to transfer the legacy data to Campus Solutions tables.

Input Format

Often the input format for the conversion program is the flat file created by the data extract program on the legacy system and transferred—by using File Transfer Protocol—to the database server. Consider loading the data into temporary tables within the PeopleSoft system instead of directly into the "live" tables. By doing this, you can use the tools already available to you to both clean up and properly convert data. The temporary tables would then be the input for the conversion program.

Conversion Program and Program Language

The conversion program transfers the legacy data from the input format to Campus Solutions tables, including reformatting, validating, and prompt table translating not encompassed in the data preparation programs. The conversion program must include defaults for Campus Solutions record keys and required fields whenever legacy data has no data map.

The two most commonly used languages for conversions are COBOL and SQR. Another option is a specific database management system (DBMS) import utility, if one exists—such as the Oracle SQL Loader. Determinants for making this decision include your skill set. For example, if you already know COBOL, there is no associated learning curve downtime, or increased resources if you use COBOL. Regardless of your skill set, consider if it would be advantageous to learn a language that is likely be used in the future for Campus Solutions modifications, conversion file size, level of translations and edits, and DBMS capability.

COBOL	Has a more robust debugger, can process a larger number of records faster, and is more widely recognized in the industry.
SQR	Is more commonly used in reporting and minor modifications. In most cases, SQR code can be written in less time than COBOL code.
DBMS Import Utility	Requires the least conversion effort but is limited to no application-specific edits or translations.

Table Loading Sequence

Conversion programming may include a single program that incorporates all pertinent tables and their sequence or multiple programs that incorporate single tables or a few related tables. Multiple programs can run simultaneously—increasing efficiency and enabling the allocation of programming responsibility.

Errors and Exception Handling

Regardless of the number of conversion programs, there must be adequate and standard error and exception handling. Reports of database action failures, validation logic failures, and pertinent details help ensure a quality and thorough conversion.

Totals Controls

In addition to errors and exceptions, totals controls also help in quality control. Totals controls include the number of records processed on both the source and destination sides, and dollar tallies whenever possible are pertinent for Financial Aid and Student Financials applications.

Required Fields

You can find out what fields are required for any table or page by searching PeopleSoft Application Designer in PeopleTools. You can also write an SQR to list all required data elements from tables that you want to use in the conversion. It is important that you also read and understand the PeopleCode. There are PeopleCode restrictions within records that can mean that in certain circumstances a field is required or a default value is required. Without understanding the PeopleCode, incorrect data could be entered.

Warning! If a field is not required, do not assume that you do not need to convert data into that field. It is recommended that when in doubt, you review the PeopleCode to determine whether you need data or default values for a particular field.

Note. Refer to individual discussions regarding each application in this chapter for specific data conversion and data loading tips for applications within Campus Solutions.

Keeping Systems in Sync

Depending on the implementation plan, there are three scenarios for moving data processing from a legacy system to a PeopleSoft system. The first scenario is to cut over everything at once. When all students are fully implemented, you perform a cutover to the PeopleSoft system. Until that point, the legacy system is fully operational. No system synchronization is required.

The second scenario is the mutually exclusive implementation approach. For example, when a student is converted to an application in Campus Solutions, such as Financial Aid, the student is officially taken off of the legacy system's processing in that application. All of the student's other application processing—Student Records, and so on—is performed on the legacy system. There are two production systems. This approach increases the complexity of joining two data sources for interfaces and reports.

The third scenario is the parallel system approach. An alternative to having two production systems is to test each Campus Solutions application as necessary, but completely delete the application database and rerun a full conversion with the most up-to-date data from the legacy system until full cutover is achieved after full testing. This approach implies that the legacy system is in full use until cutover, but no new programs must be written—for example, the conversion program is reused and all reports continue to be produced from the legacy system. A variance of this approach is to write new data refresh programs that periodically update the various applications with student information entered in the legacy system. This variance provides for more up-to-date information for more accurate reporting and testing, but also implies the additional effort to program the refresh routine. Care must be taken in the refresh routine design to ensure that data in the PeopleSoft system is not duplicated or overlaid by the legacy data.

Estimating Disk Usage Space

For Campus Solutions, PeopleSoft has done some preliminary research on the sizing of a production system. PeopleSoft realizes that the theoretical amount of disk space required by an application is different than the actual amount of disk space required by a database. The difference is due to comparing bytes with database blocks. For instance, if a particular table's average row length is 25 bytes and there are 1,000 rows in the table, theoretically the required amount of space is 25,000. However, if the database block size is 4K (4096), the number of database blocks required to hold the data is seven blocks or 28,673. Therefore, the actual amount of disk space required is greater than the theoretical. With this in mind and realizing that each installation may require a different block size, PeopleSoft states the size in theoretical terms.

For 1,000 student prospects, the amount of space needed for tables and indexes would be 40 megabytes (MB).

For enrollment, PeopleSoft needs to work with a specific, albeit theoretical, scenario. PeopleSoft's scenario was to enroll 1,000 undergraduate students over three terms into four classes per term. In the first term, there are no prerequisites to enroll in any of classes; the second term has one prerequisite for each of the classes; the third term has two prerequisites for each of the classes. During enrollment, the students have no time conflicts and there is no lack of facilities (rooms or seats). The amount of disk space excludes description information stored in long text fields. For 1,000 student enrollments, the amount of space needed for tables and indexes would be 20 MB.

Converting Recruiting and Admissions and Campus Community Data

This section provides an overview of conversion of recruiting and admissions and campus community data and discusses how to populate tables for recruiting and admissions and campus community data.

Understanding Conversion of Recruiting and Admissions and Campus Community Data

PeopleSoft recommends that you convert recruiting and admissions data first along with relevant Campus Community data such as personal data—names, addresses, phone numbers, and so on.

It is up to you how much of this data you convert—for instance, how many addresses you convert for one individual—and how much history you take into consideration. Of course, if the student records team is converting 10 years of student records, make sure that there are 10 years of personal data elements in the system.

PeopleSoft recommends that institutions convert up to two years of recruiting and admissions data. Again, this may vary depending upon your practices and your needs. Regardless of how much history you do convert, it is important that you keep the prospect stacks of data and the Recruiting and Admissions stacks of data consistent. You do not want to end up with a year of recruiting and admissions data without the prospect data for the same year. This also ensures that the data required for institutional research reporting—for instance, cohort reporting and statistical reporting—remains consistent.

Populating Tables for Recruiting and Admissions and Campus Community Data

Aside from address and other information, there are some tables that are precursors to all application conversions in Campus Solutions. These tables represent the minimum to be converted.

Academic Organization Tables

Populate these tables in this order for academic organizations:

- INSTITUTION_TBL
- CAMPUS_TBL
- ACAD_CAR_TBL
- ACAD_ORG_TBL
- SUBJECT_TBL
- ACAD_PROG_TBL
- ACAD_PLAN_TBL
- ACAD_SUBPLAN_TBL

Level and Load and Term and Session Tables

Populate these tables in this order for level and load and term and sessions:

- LEVEL_LD_RULE_TBL
- ACAD_LEVEL_TBL
- ACAD_LOAD_TBL
- TERM_TBL
- TERM_VAL_TBL
- SESSION_TBL
- ACAD_CAL_TBL
- ACAD_CALTRM_TBL
- ACAD_CALSES_TBL

In addition to these tables, you must convert these tables as early in the process as possible in the sequence. Use the name and address load routines delivered with the system, to load data:

- PERSON.
- PERS_DATA_EFFDT.
- PER_POI_TYPE.

  PERSONAL_DATA.
- DISABILITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- DIVERSITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- NAMES.
- ADDRESSES: to display and convert any address information, including those on PERSONAL_DATA.
- ADM_PRSPCT_CAR.
- STDNT_CAREER.
- ADM_APPL_DATA.
- ADM_APPL_PROG.

- GENL_MATERIALS: to track materials already received for applications.
- EXT_ORG_TBL.

Converting Financial Aid Data

This section provides an overview of conversion of financial aid data and discusses how to populate tables for financial aid.

Understanding Conversion of Financial Aid Data

This section lists prerequisites and discusses conversion of financial aid data.

Prerequisites

Before you can convert financial aid data, personal data for each financial aid record must already be converted. In addition, financial aid data should be converted prior to student financials data, because posting of financial aid in Student Financials is dependent upon the disbursements in Financial Aid.

You must define item types before you begin conversion of financial aid data. You must decide whether financial aid or student financials has ownership of the PeopleSoft Item Types table.

Conversion of Financial Aid Data

PeopleSoft recommends that schools convert up to two years of financial aid data, and as much aggregate data as possible, because it has lifetime loan limit information. Ultimately, it is up to you how much data you convert. You may decide to keep the legacy system up until fall of the conversion year to close out Pell Payment and FISAP reporting.

Note. Please refer to the Department of Education's requirements for maintaining financial aid records to assist you in deciding how much legacy data to convert to the PeopleSoft system.

See Also

Chapter 3, "Preparing for Data Conversion," Converting Student Financials Data, page 48

PeopleSoft Enterprise Financial Aid 8.9 PeopleBook, "Setting Up Packaging Basics," Defining Financial Aid Item Types

Populating Tables for Financial Aid

At a minimum for Financial Aid, convert the aggregate data for these tables:

- STDNT_AGGR_LIFE
- STDNT_AGGR_ALL
- STDNT_AGGR_SCHL

You may want to convert additional data depending on what you have in the current system:

- Automatic packaging.
- ISIR data.

- Student budget information.
- Years of award activity.
- Loan history.
- Work-study history.
- Checklists for documents already received.

Converting Student Records Data

You enter data in Student Records tables by academic program. How much history data you convert is up to you.

This section lists prerequisites and discusses how to:

- Populate tables for student records.
- Convert enrollment data.

See Also

Chapter 3, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 43

Prerequisites

Some of the tables, as noted in the Converting Recruiting and Admissions and Campus Community Data section, must be loaded before you load the student records data.

Populating Tables for Student Records

At a minimum for Student Records, set up these tables in the sequence they are listed.

For the course catalog and schedule of classes, there is PeopleCode behind the COURSE_ID field to increment a new course ID by 1. To mimic what this PeopleCode does, the conversion program needs to do the +1 logic. You can manually set the next available course ID in the installation table for Campus Solutions. You should update the last course ID assigned in the Installation table, so that you do not have collisions between the course IDs assigned by the conversion and course IDs manually created later.

In addition to the conversion program you write to create the catalog, you should set the Status field on the Catalog Data page to *Active* so that the course is active as soon as you run the conversion program to create the record.

Course Catalog Tables

Populate these tables for the course catalog:

- CRSE_CATALOG
- CRSE_COMPONENT
- CRSE_OFFER

Schedule of Classes Tables

Populate these tables for the schedule of classes:

- CLASS_TBL
- CLASS_ASSOC
- CLASS_COMPONENT

Student Careers and Plans

Populate these tables for student careers and plans:

- STDNT_CAREER
- STDNT_CAR_SEQ
- ACAD_PROG
- ACAD_PLAN

Student Degrees

Populate these tables for student degrees:

- DEGREE_TBL: populate this table manually.
- ACAD_DEGREE.
- ACAD_DEGR_HON.
- ACAD_DEGR_PLAN.
- ACAD_DEGR_SPLN.

Grades

Populate these tables manually for grades:

- GRADING_SCHEME_TBL
- GRADE_BASIS_TBL
- GRADE_TBL

Student Term Data

Populate these tables for student term data:

- STDNT_CAR_TERM
- ENRL_REQ_HEADER
- ENRL_REQ_DETAIL

See Also

Chapter 4, “Reviewing Installation Setup and System Defaults,” Selecting General Installation Options, page 55

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up the Course Catalog”

Converting Enrollment Data

There are three options to select for converting student enrollment data. Note that when you convert enrollment data you must create enrollment request input transactions and engage the enrollment COBOL engine to actually post the enrollments. This is the only way that the statistics on the STDNT_CAR_TERM table are automatically calculated.

Options for converting enrollment data are:

1. Convert the data as normal student enrollment data.

   This is the recommended option. The course catalog and schedule of classes must be converted first, and you must have data for these as far back as you want to have enrollment data. The conversion program must create class association groups for the offerings when you convert the schedule of classes. In addition, a student career term must be present for every past term that you intend to convert. For each class section that you convert historically, you need an entry in the CLASS_TBL. This does not mean that you must convert all of the class sections, just the sections that are graded. Even for graded sections the amount of data needed is minimal. For example, you may choose not to convert meeting times and instructors for classes. You may want to have the conversion programs roll all enrollments for a course in a term into one section. For example, if English 101 had 51 sections in fall 1996, you could create a Section 1 for that term and convert all 51 sections into that Section 1.

2. Convert enrollment data as internal transfer credit or other credit.

   This option is necessary if you have only your course catalog but not your class schedule for as far back as you want to convert data. This method can make transcript printing a challenge, because past credits prior to conversion appear as transfer credit. Having split transcripts may also be an option, if issuing two transcripts for a student is acceptable—one from the old system for prior work and one from the new Campus Solutions system for all work after you bring the system up. In this case, you would still want to convert the enrollment data by summary transfer credit, so that the prior system's term academic statistics roll into Campus Solutions.

3. Use the Historical Course Enrollment page (Manage Student Records, Manage Academic Records, Use, Historical Course Enrollment) and convert statistics in summary by using the transfer credit engine.

   If you cannot go through the effort to convert prior enrollment history, or the data is not available to you electronically to reconstruct prior course catalog and schedule of classes data, use the Historical Course Enrollment page. Create an SQR or other program to directly load enrollment data onto the Historical Course Enrollment page, and manually clean up this data. If you select this option, convert summary statistics by using the transfer credit COBOL process.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Using Enrollment Related Processes," Creating Historical Enrollment Records

Converting Student Financials Data

This section lists prerequisites and discusses how to populate tables for student financials.

Prerequisites

Student Financials receives data from many of the other Campus Solutions applications. For this reason, you must set up parts of other applications before you can convert the student financials information.

You must convert personal data tables and external organizations data before you convert student financials data.

See Also

Chapter 3, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 43

Populating Tables for Student Financials

This list presents information about populating the tables related to Student Financials:

- General Ledger (GL).

  Make sure that the GL information is set up on the Item Type table. You can convert the data and run a GL interface to set the GL fields, or you can convert the fields as having already been sent to the GL.

- Financial Aid.

  Another important consideration in the sequencing of the student financials conversion is processing financial aid. If you are thinking about going live with financial aid and its disbursements at mid-year, consider the effect on the coordination of disbursing financial aid and the balance of the student's account for the year. For example, the disbursed fields in Financial Aid should be in sync with the amounts in Student Financials, if automated disbursement is to take place for that particular term. In addition, anticipated aid is used in numerous processes in Student Financials. Therefore, an important consideration is the conversion of anticipated aid for current processing cycles, as conversion or lack of conversion affects student financials processes. PeopleSoft recommends that the conversion is for fall term, rather than for mid-year, for these reasons.

- Payment Plans.

  Third-party processing and payment plans are also an important conversion issue for student financials. To take advantage of Student Financials processing for payment plans and third-party processing, ensure that the conversion of this data occurs and that separate accounts are created for the various contracts that you have established for student sponsorship or extended payment options.

- Posting.

  The major focus of the conversion effort for student financials is getting all of the old account and transaction information into the new system. The primary vehicle for converting the information is posting. It is possible to directly update the processing tables with data from the legacy system. However, it is much safer and cleaner to use the posting process to convert the legacy data. This is not to say that you do not need to update the information after posting. Using the posting process gives you cleaner data and provides a base upon which you can edit the information.

  Create groups and use the group posting process to get the information on the system. Update other information as needed. The group posting process enables you to break down and track student populations and time categories into meaningful groups that you can edit and correct. Possible group scenarios might be academic—that is, convert all medical school students, dental students, veterinary students, and so on. Another possible categorization is using time-based groups. You may want to break the student population into groups by term.

  However you break down the groups, plan the data mapping carefully between the group posting tables and the current legacy data. Run several trials of posting groups and test the system to see if it processes correctly from adjusting tuition, adjusting financial aid disbursements, and producing a bill.

- Tuition Charges.

If you are planning to use the tuition calculation process to convert tuition charges for prior terms, you have two options. You can either convert and post all the information from prior terms, or you can skip the tuition charges and use the tuition calculation process for prior terms as the method for converting the data. The former option does not require the conversion of academic data from prior terms; the latter does require that correct academic data be converted prior to the student financial data.

Converting Contributor Relations Data

This section lists prerequisites and discusses how to:

- Populate tables for Contributor Relations.
- Create accumulated records for gift and pledge inquiry.

Prerequisites

Contributor Relations uses data from some of the other Campus Solutions applications. For this reason, you must set up Student Financials item types and related general ledger information as well as Human Resources departments before you can convert some of the contributor relations information.

Populating Tables for Contributor Relations

At a minimum for Contributor Relations, set up these tables.

Organization Structure Tables

Populate these tables for organization structure:

- INSTITUTION_TBL
- CAMPUS_TBL
- DEPARTMENT_TBL
- AV_BUS_UNIT_TBL

Campus Community and Constituent Tables

Populate these tables for Campus Community and constituent data:

- PERSONAL_DATA.
- PERS_DATA_EFFDT.
- PERS_NAME_TYPE.
- DISABILITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- DIVERSITY: required for PERS_DATA_EFFDT and PERSONAL_DATA to function properly.
- NAMES.
- ADDRESS_TYPE.
- ADDRESSES: to display or convert any address information, including that on PERSONAL_DATA.
- EXT_ORG_TBL.
- AV_CNST_TYP_TBL.

- AV_LEGACY_DEG: to convert alumni degree records if you do not want to create all previously existing academic structures in the student records tables.

  Otherwise, all of the Student Careers and Plans and Student Degrees tables listed in the Converting Student Records Data section are required for tracking academic data.

Note. The EXT_ORG_ID field should be left blank for PeopleSoft data. This field is used to store data for external organizations. When dealing with an organization, you would leave EMPLID blank and load the EXT_ORG_ID for the organization.

Gift Tables

Populate these tables for gifts:

- AV_SESSION_TBL: required.
- AV_BTCH_TOT: required.
- AV_GIFT_DTL: required.
- AV_DESIGNATION: required.
- AV_RECOGNITION: required.
- AV_RCG_DES: required.
- AV_MTCH_GIFT: optional.
- AV_TRIBUTE_DTL: optional (Honor Of or In Memory Of).
- AV_TRIBUTE_NTFY: optional.

Pledge Tables

Populate these tables for pledge data:

- AV_SESSION_TBL: required.
- AV_BTCH_TOT: required.
- AV_PLEDGE_DTL: required.
- AV_DESIGNATION: required.
- AV_RECOGNITION: required.
- AV_RCG_DES: required.
- AV_PLDG_SCHD: required for active pledges but optional for complete pledges.
- AV_TRIBUTE_DTL: optional (Honor Of or In Memory Of).
- AV_TRIBUTE_NTFY: optional.
- AV_SESSION_TBL.

  Populate all key fields, plus all other fields you can populate. The SESS_STATUS = O for trial runs but should ultimately be set to P for posted. The user ID is important here as it dictates security. (They can all have the same user ID, such as PS.) The ACKN_FLG field should be set to Y.

- AV_GIFT_DTL.

Populate all key fields, plus all other fields you can populate. The FISCAL_YEAR (CCYY) should be populated. The SESSION_NO should start with one and increment by one for every group of 100 records, if the organization chooses to abide by the recommendation of 100 records per session. The SEQ_NO should be 1 for historical data, provided these are all just gifts and not adjustments. The sequence is one for the original gift and increments (by two within the AV_GIFT_DTL table—for example 1, 3, and 5), with each adjustment made to the original gift. The SEQ_NO in the AV_ADJ_GIFT_DTL table increments with even numbers by two to indicate the offsetting record to the related AV_GIFT_DTL record. The ACKN_FLG field should be set to Y.

Note. If you don't want historical gifts to get an acknowledgement, then set the AV_SESSION_TBL. ACKN_FLG field to Y.

- AV_DESIGNATION.

  Populate all key fields, plus all other fields you can populate. This is not a setup table, but an allocation of the gift detail record to one or more designations.

  Note. Amounts can default to the gift amount if there is only one designation or recognition per gift. If there is more than one designation or recognition per gift, then the amount fields need to be populated with actual amounts or percentages.

- AV_RECOGNITION

  Populate all key fields, plus all other fields that you can populate. RCG_PCT_AMT and RCG_APPLIED should be mapped to gift amount (if there is only one recognition per gift). The RECOGNITION_TYPE = H for hard credit. For soft credit, there are different types (such as vehicle credit) that are defined by the institution. No soft credit values are delivered. RECOGNITION_TYPE is a setup value, with H being a delivered, required value.

- AV_RCG_DES

  Populate all key fields, plus all other fields that you can populate. RCG_DES_AMT and CHARITABLE_AMT should be mapped to gift amount (if there is only one recognition or designation per gift). For Soft Credit CHARITABLE_AMT = 0.

Note. For converted active pledges to have pledge payments made against them, the AV_SESSION_TBL.SESS_STATUS field for the pledge session must be set to P.

Creating Accumulated Records for Gift and Pledge Inquiry

In Contributor Relations, the system runs Giving Profile and Commitment Summary online reports based on summary accumulator records rather than detailed transaction records. For the proper information to appear on these reports, you must initialize the summary accumulator records for all constituents and all gifts and pledges in the system. Contributor Relations delivers a Constituent Accumulator Initialization Application Engine process (AV_ACC) to perform this task. To access the process, select Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Accumulator Initialization. When initialized, incremental accumulations take place for affected constituents during the Constituent Accumulator process. You can run this process either by itself or along with the GL Interface job.

The Constituent Accumulator Initialization process is a resource-intensive process that requires an extended background processing window. The process deletes and recalculates all data from the accumulator records (PS_AV_CNST_ACC, PS_AV_CNST_ACC_DES, and PS_AV_CNST_ACC_FY). If all transactions contained within in-process sessions are first completed (their session status changes to *Posted*), do not select the Search for unposted Pledge Payments and Search for unposted Matching Gifts options. This improves the performance of the initialization process.

Note. If you do not complete the initialization process, the system does not complete the information displayed online on the Giving Profile and Commitment Summary pages.

If additional groups of constituents are required to allow the process to complete within the particular background processing window, the records in the PS_AV_ACCUM_INIT table can be modified to include more, smaller groups. Remember, however, that additional occurrences of the temporary tables used by the AV_ACC Application Engine process are required if you run more than the delivered five processes at any one time.

See Also

Chapter 19, "Setting User Defaults," page 307

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

CHAPTER 4

Reviewing Installation Setup and System Defaults

This chapter provides an overview of installation setup and system defaults and discusses how to:

- Select general installation options.
- Select country-specific information.
- Review incremental numbering.
- Set up primary permission list preferences.

Understanding Installation Setup and System Defaults

There are several settings on the system's installation pages that you should review before setting up any of the Campus Solutions applications. Specifically, you should review settings that point the system to the applications that you have installed, settings that begin and maintain incremental numbering, and settings that define basic default values throughout the system. It is a good idea to review the country codes and country address formats defined on the installation pages, too. If any of these settings are not correct or do not reflect the institution's design decisions, you could experience problems getting the system to operate properly.

Selecting General Installation Options

To set up general installation options, use the Installation Table component (INSTALLATION_TBL).

This section discusses how to select installed applications.

Note. Only the pages that are relevant for Campus Solutions are described here.

See Also

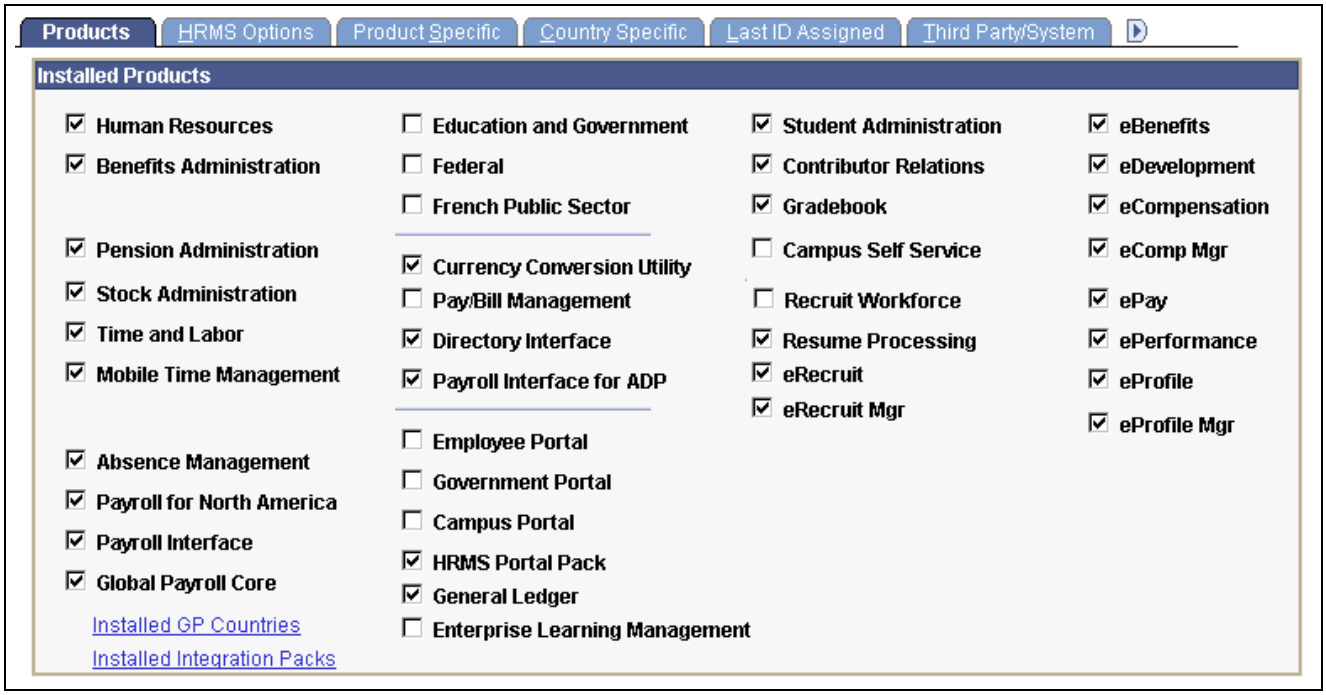
PeopleSoft Enterprise Human Resources Management System documentation

Page Used to Select General Installation Options

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Select which PeopleSoft applications and application parameters are installed on the system. Ensure that the settings on this page are accurate before using the Campus Solutions system.

Selecting Installed Applications

Access the Products page.



Products page

If the institution has installed only the Campus Solutions application, then clear the Human Resources check box and select the Student Administration check box. If Human Resources is selected but that application is not installed, values set to automatically appear in the Campus Solutions system might not appear, and you could get random error messages as you navigate through the system.

If you installed PeopleSoft Enterprise Contributor Relations, select the Contributor Relations check box, along with the Student Administration check box.

If the institution has installed both the HRMS and Campus Solutions applications, then select both the Human Resources and Student Administration check boxes. If you have both applications, you might review the other settings to determine if they are set properly for HRMS.

The Campus Self Service product combines a group of self-service applications. These applications are used with Campus Solutions. If you have installed this product or any self-service application, select the appropriate check box here.

Note. When both HRMS and Campus Solutions applications are installed, the Campus Solutions functions take precedence over HRMS. That is, where the two applications have similar features or the same tables, the system points to the Campus Solutions features or tables first.

See Also

PeopleSoft Enterprise Human Resources Management System documentation

Selecting Country-Specific Information

Campus Solutions applications support U.S.- and Canada-specific demographic data.

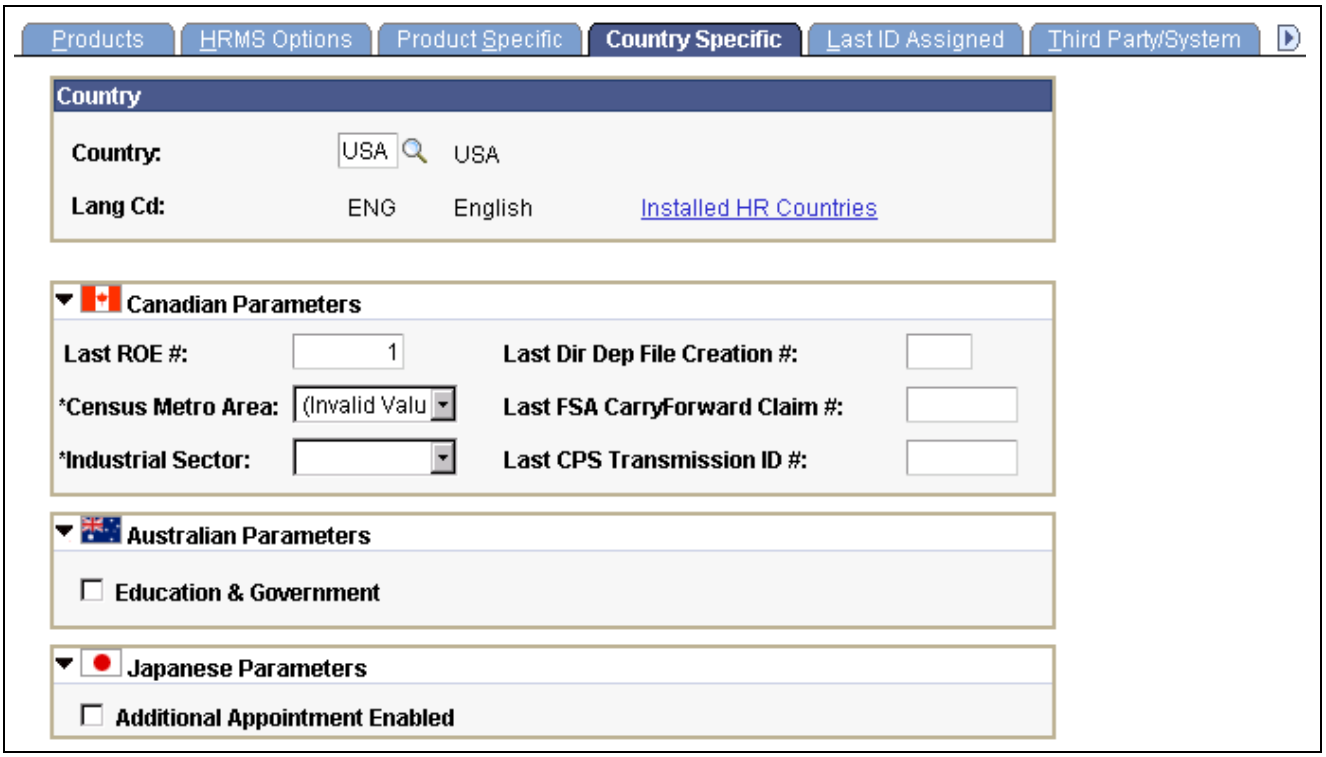
This section discusses how to enter country-specific information.

Pages Used to Select Country-Specific Information

Page Name	Object Name	Navigation	Usage
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table, Country Specific	Enter country-specific installation information.

Entering Country-Specific Information

Access the Country Specific page.



Country Specific page

Click the Installed HR Countries link to access the Installed HR Countries page, where you can select which country-specific collapsible sections you want displayed in the system.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality"

Selecting Student Administration Installation Options

To set up installation options, use the Student Admin Installation component (INSTALLATION_SA).

This section discusses how to:

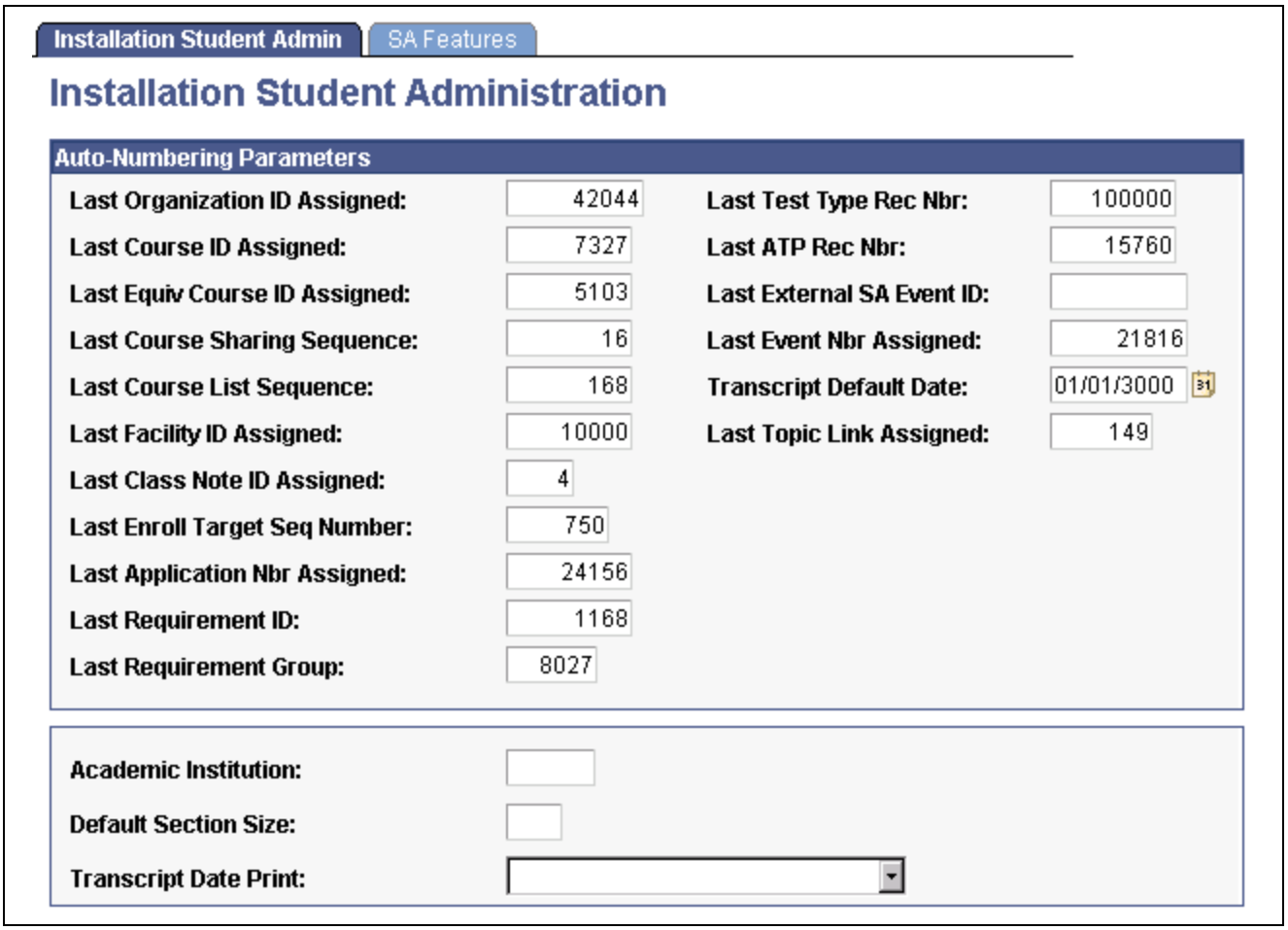
- Set up incremental numbering.
- Select country-specific features.

Pages Used to Select Student Administration Installation Options

Page Name	Object Name	Navigation	Usage
Installation Student Admin (Installation Student Administration)	INSTALLATION_SA	Set Up SACR, Install, Student Admin Installation, Installation Student Admin	Set up or review incremental numbering for items throughout the system.
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	This page is used to turn on country-specific features.

Setting Up Incremental Numbering

Access the Installation Student Admin page.



Installation Student Admin page

Each field on this page is automatically incremented or automatically appears by default throughout the system. Set the last used numbers so that automatic numbering does not create numbers that already exist in the data.

If you want the increments of any of these fields to start at a number other than zero, enter that number on this page before you do anything else in the system.

Note. After you have begun converting or entering data and running processes, you can access this page to determine the last number that was incremented for each of the fields listed, but you should *not* change the numbers.

Last LS ID Assigned (last learning solutions ID assigned) Displays the last learning solutions ID assigned. The automatic sequential assignment of IDs for individuals and IDs for organizations is based on this field. You can change the value of this field if the institution needs to use a different numbering scheme; however, PeopleSoft recommends that you use the automated numbering assignment. Used by various applications.

Note. This field accepts a length of up to 11 characters; however, PeopleCode shipped with Campus Solutions limits the ID length to a maximum of seven characters. If you increase the length of the ID field, you increase the number of leading zeros for the ID. For example, at the default seven-character length, the ID is 0000001, whereas at a character length of 11, the ID is 00000000001. This is specific to IDs in Campus Solutions, Contributor Relations, and Human Resources, when you have Campus Solutions installed with HRMS.

Last Course ID Assigned Displays the last course ID assigned. Used by PeopleSoft Enterprise Student Records.

Last Equiv Course ID Assigned (last equivalent course ID assigned) Displays the last equivalent course ID assigned. Used by Student Records.

Last Course Sharing Sequence Displays the last course sharing sequence. Used by PeopleSoft Enterprise Academic Advisement.

Last Course List Sequence Displays the last course list sequence. Used by Student Records.

Last Facility ID Assigned Displays the last facility ID assigned. Use to enable the system to display by default an automatically incremented facility ID number each time that you create a new facility on the Facility Table setup page. If you do *not* want to use auto incremental numbering, you are required to enter a value for Facility ID when adding a new facility.

Used by various applications.

Last Class Note ID Assigned Displays the last class note ID assigned. Used by Student Records.

Last Enroll Target Seq Number (last enrollment target sequence number) Displays the last enrollment target sequence number. Used by Student Records and Recruiting and Admissions for Enrollment Management Enrollment Targets.

Last Application Nbr Assigned (last application number assigned) Displays the last application number assigned. Used by Recruiting and Admissions.

Last Requirement ID Displays the last requirement ID. Used by Student Records and Academic Advisement.

Last Requirement Group Displays the last requirement group. Used by Student Records and Academic Advisement.

Last Test Type Rec Nbr (last test type record number) Displays the last test type record number. Used in processing suspense records for data loads. Used by Recruiting and Admissions.

Last ATP Rec Nbr (last admissions testing program record number) Displays the last ATP record number. If you enter *50,000* in this field, next time that you run the ATP data load SQR process (CCATPLOD), each school loaded will have a number assigned starting from 50,000. This field is not connected to the institution's unique ATP code. Used by Campus Community and Recruiting and Admissions.

Last External SA Event ID (last external student administration event ID) Displays the last external student administration event ID. Used by various applications, including Contributor Relations.

Last Event Nbr Assigned (last event number assigned) — Displays the last event number assigned. Used by various applications, including Contributor Relations.

Transcript Default Date — Displays the transcript default date. This is the default date used for processing academic advisement degree audit reports. To set the default to the current date, leave this field blank. Used by Academic Advisement.

Last Topic Link Assigned — Displays the last topic link ID assigned. Used by Student Records on the Catalog Data page.

Academic Institution — Select an academic institution to use as a default throughout the system.

Default Section Size — Enter a number to use as a default for class size. This value is used in creation of new class sections. The value is originally rolled into the Catalog Record when it is created, and then it is used to enter the number by default into the ENRL_CAP field in the CLASS_TBL.

Transcript Date Print — Indicates the date on which you want the system to print when printing student transcripts. Select a value to be the default value when a row is entered. Select one option per term. Options are:

Class Date: Prints the valid start and end dates for each class on a transcript.

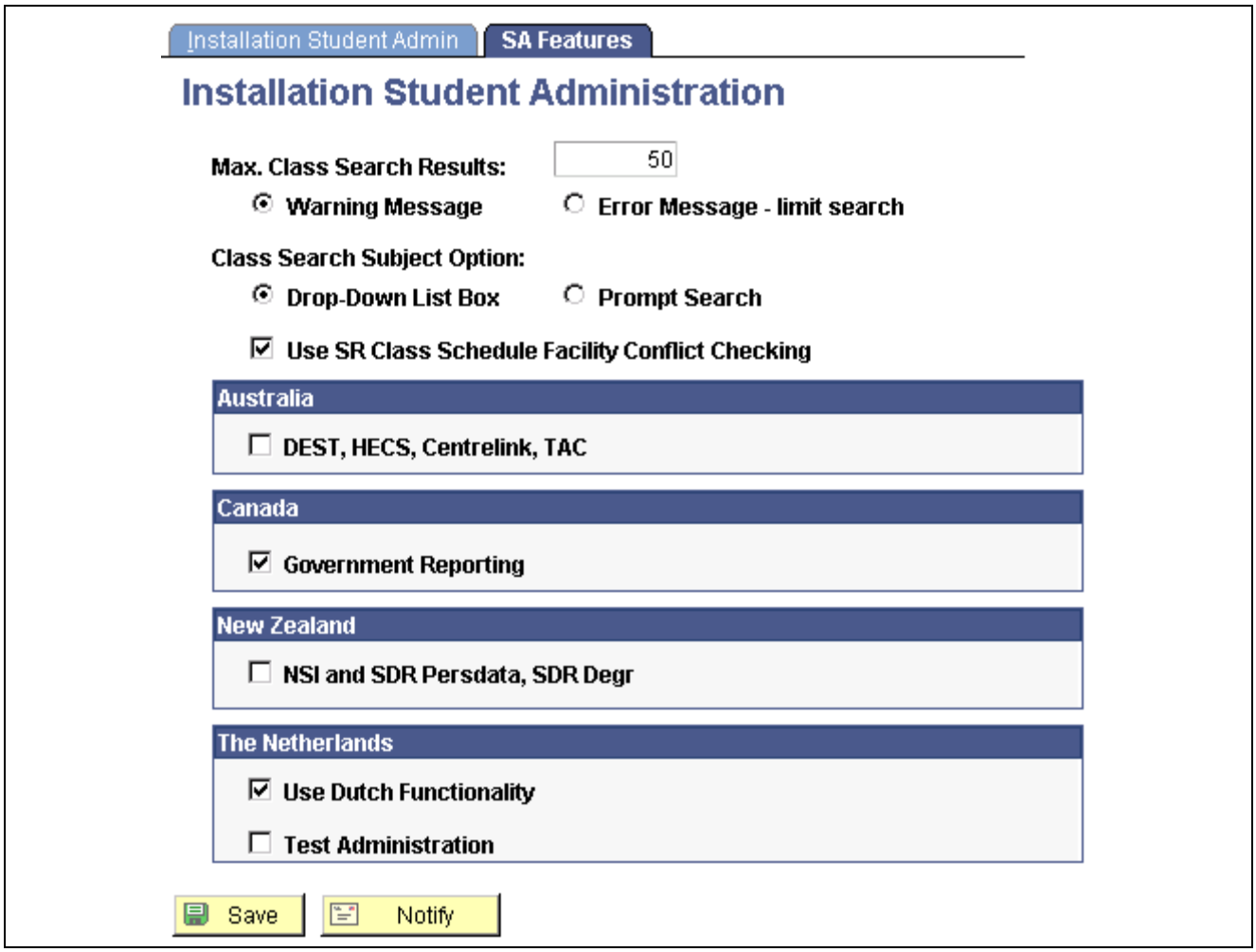
Session Dt (session date): Prints the valid start and end dates for a session within a term on a transcript.

Term Dates: Prints the valid start and end dates for the term on a transcript.

No Dates: None of the above dates print on the transcript.

Selecting Country-Specific Features

Access the SA Features page.



SA Features page

Class Search Options

Enter the maximum number of class search results allowable for a search. Choose for the system to display either a warning message or an error message if a user's search results exceeds the maximum. A warning message allows the user to continue; an error message requires the user to narrow the search criteria.

Also, select whether search options appear as available options or as a search prompt.

Country-Specific Features

Select the appropriate check box to enable functionality specific to each country.

Australia This functionality is not currently used.

Canada Select to enable Canadian reporting functionality.

New Zealand This functionality is not currently used.

The Netherlands Select to enable Dutch functionality.

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission lists and discusses how to:

- Set permission list defaults.
- Set industry sector and payroll information.

See Also

Chapter 17, "Creating and Maintaining User Profiles," page 277

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

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Primary Permission Lists

When you are using the User Profiles Management process, it is necessary for you to set up primary permission lists when you give user IDs access to pages.

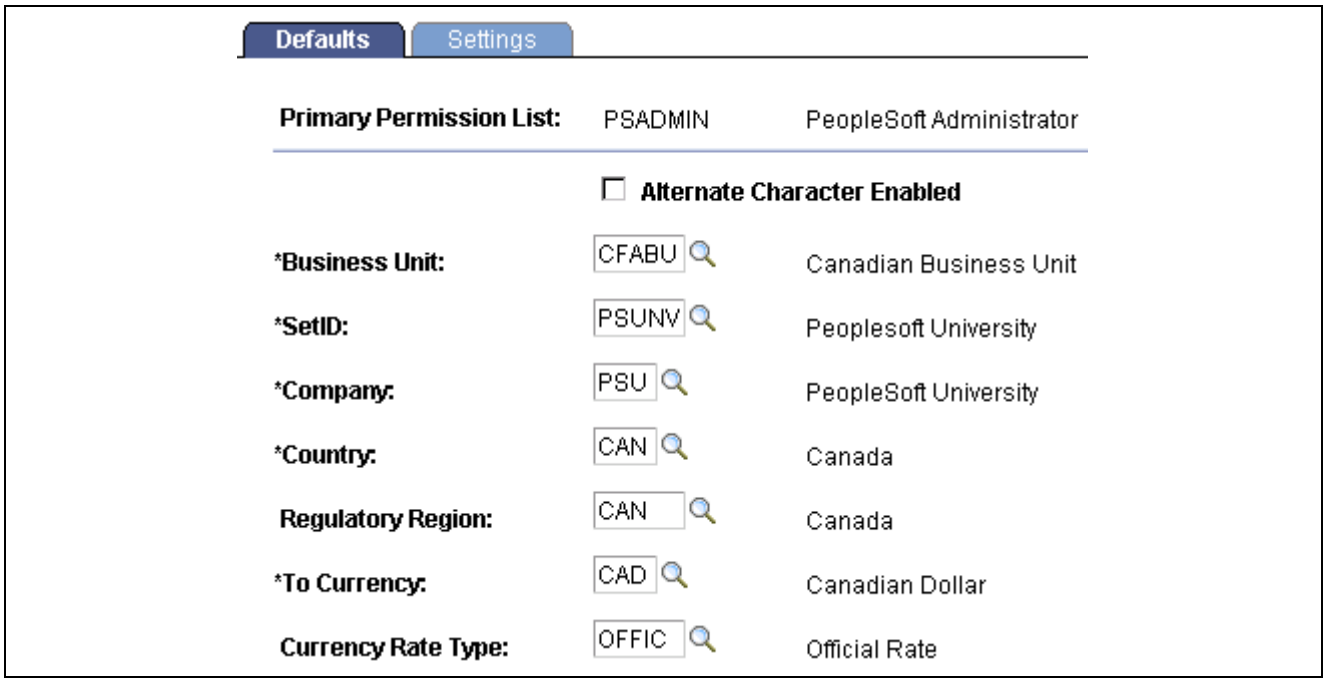
Use the Primary Permission List table to set predefined tableset sharing as well as systemwide defaults and settings for each of the primary permission lists. The system displays by default the values that you indicate for a particular permission list in the Primary Permission List Preferences table—such as business unit, setID, currency, country, or company code—when a user associated with that permission list logs in to Campus Solutions or Contributor Relations. You can tailor the Campus Solutions systems for each user, controlling the default values that users see on pages in the system.

Pages Used to Set Up Primary Permission List Preferences

Page Name	Object Name	Navigation	Usage
Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Defaults	Set predefined tableset sharing and systemwide defaults for each primary permission list.
Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List, Settings	Set the systemwide default settings for each permission list. By using this page, you can tailor the system for each permission list, controlling the default values that users see on pages in the system.

Setting Permission List Defaults

Access the Primary PrmList Preferences – Defaults page.



Defaults page

Note. These defaults override the defaults that you set for these options in the Installation table for this permission list.

The TableSet Record Group Control table regulates what users see in prompt tables.

Alternate Character Enabled Select to indicate if you want alternate character searching enabled for this permission list.

Business Unit Indicate the default business unit for this permission list from among the list of valid business units stored in the Business Unit table.

SetID Indicate the default setID for this permission list from among the list of valid set IDs stored in the TableSet ID table.

Warning! The values that you indicate here affect business unit and setID defaults for this permission list throughout the system.

Company Enter the default company for this permission list.

Country Enter the default country for this permission list.

Regulatory Region This field is not used in Campus Solutions.

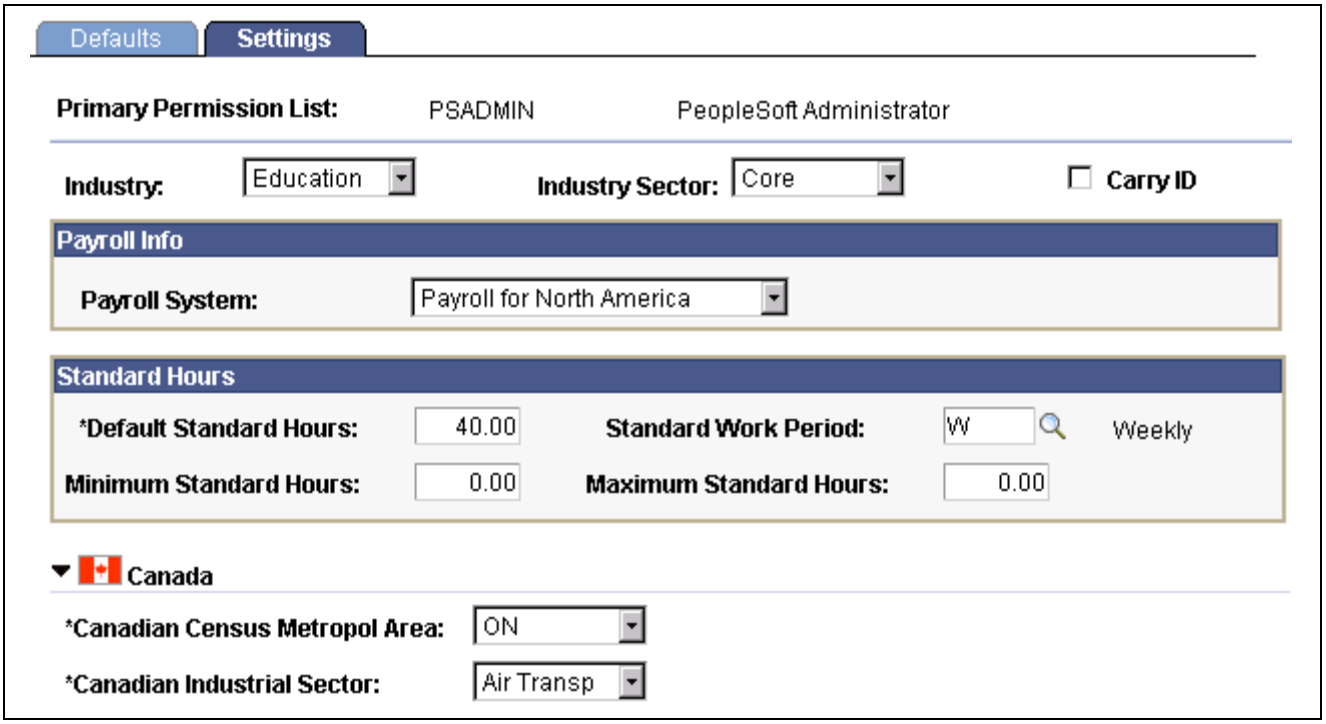
See PeopleSoft Enterprise Human Resources Management System documentation

To Currency Select a currency to act as default values for this permission list in Campus Solutions.

Currency Rate Type Select a currency rate type to act as a default value for this permission list in Campus Solutions.

Setting Industry Sector and Payroll Information

Access the Settings page.



Settings page

Industry Select the industry for this permission list. Select *Education* to indicate that this is an education database.

Industry Sector Select the industry sector for this permission list. Values are: *Core, Public Sct* (public sector), and *US Federal.*

Carry ID Select to carry an ID of the last individual or organization that you enter or select from search box to search box and page to page. You do not have to reenter or reselect the ID each time, if you want to continue editing or reviewing data for the same individual.

If you choose any country other than the U.S. on the Defaults page, country-specific fields may appear on the page as well.

See Also

PeopleSoft Enterprise Human Resources Management System documentation

CHAPTER 5

Designing Your Academic Structure

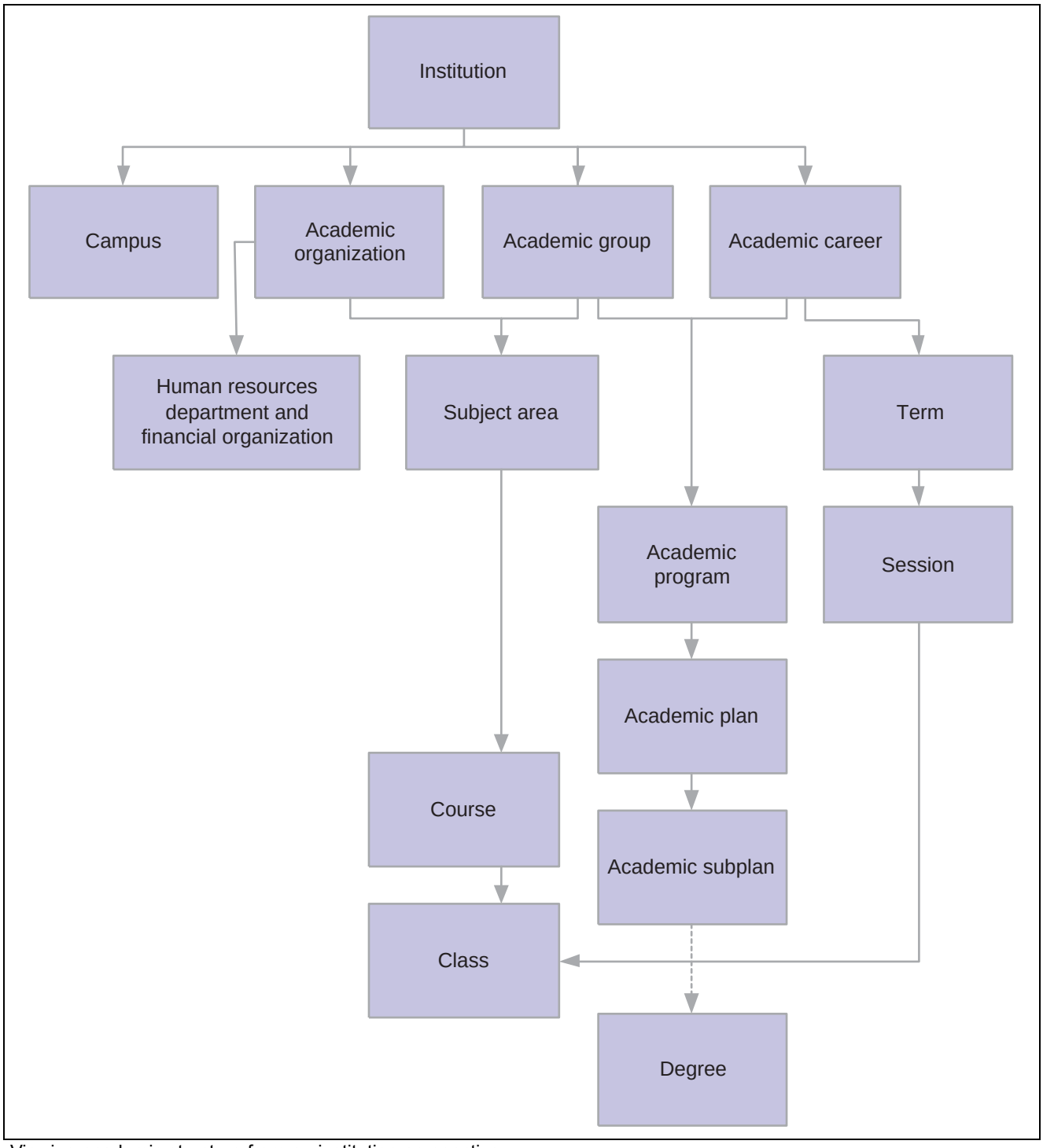
Set up your academic structure before using the full functionality of the Campus Solutions system. Make sure that you understand how the institution structures campuses, academic careers, academic organizations, academic departments or groups, and subject areas.

This chapter provides an overview of academic structure and discusses how to:

- Define academic institutions.
- Set up campuses.
- Define academic careers.
- Create career pointer exception rules.
- Define academic level and load rules.
- Define academic organizations.
- Define academic groups.
- Establish fields of study.
- Modify Classification of Instructional Programs (CIP) and Higher Education General Information Survey (HEGIS) codes.
- Define subject areas.
- (NLD) Define Dutch academic structure.

Understanding Academic Structure

The academic structure and its elements are the building blocks for an academic institution. This diagram illustrates an institution's academic structure at a high level:



Viewing academic structure from an institution perspective

You can have many campuses that are part of the academic institution. Academic programs are a part of academic careers and the academic institution. Subject areas are part of academic organizations and the academic institution. Academic plans and academic subplans are subdivisions of academic programs. Degree records are directly linked to academic plans. Courses and classes are subdivisions of subject areas and are directly linked to terms and sessions.

Defining Academic Institutions

To set up academic institutions, use the Academic Institution Table component (INSTITUTION_TBL).

An academic institution is an entity, such as a university or college, that runs independently from other like entities and has its own set of rules and business processes. Typically, you define just one academic institution, but you can define as many as you need. Throughout Campus Solutions, you use academic institutions as a key value to group data into tables and search against those tables to extract data.

This section lists prerequisites and discusses how to:

- Define the name and location of academic institutions.
- Set academic institution defaults.
- Set additional institution defaults and options.
- Activate set instructor workload.
- Set repeat-checking controls.

Prerequisites

You must decide whether you want a single or a multi-institution structure. Set up separate academic institutions only if the entities function as distinctly separate schools. Each academic institution must have these characteristics:

- Separate course catalogs and schedule of classes.
- Independent statistics and transcripts.
- Students who do not normally enroll in classes from one academic institution while attending another academic institution.

  For example, although you might have a law school that is a separate entity in many ways, the law students might sometimes enroll in graduate courses as part of their law careers.

Also, before establishing academic institutions, define these items:

- SetIDs

  A setID is used throughout Campus Solutions as a substitute for an academic institution or a student financials business unit. Instead of keying a number of tables by academic institution or business unit, the tables are keyed by setID, which enables institutions to share common codes, structures, and facilities.

- Grading schemes

  Grading schemes are the rules that the academic institution uses for assigning and converting grades.

- Country codes

  Country codes enable you to define the address for the academic institution in the address format appropriate for the country in which the academic institution is located.

See Also

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Completing Student Financials General Setup," Understanding Business Units

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Designing Campus Community"

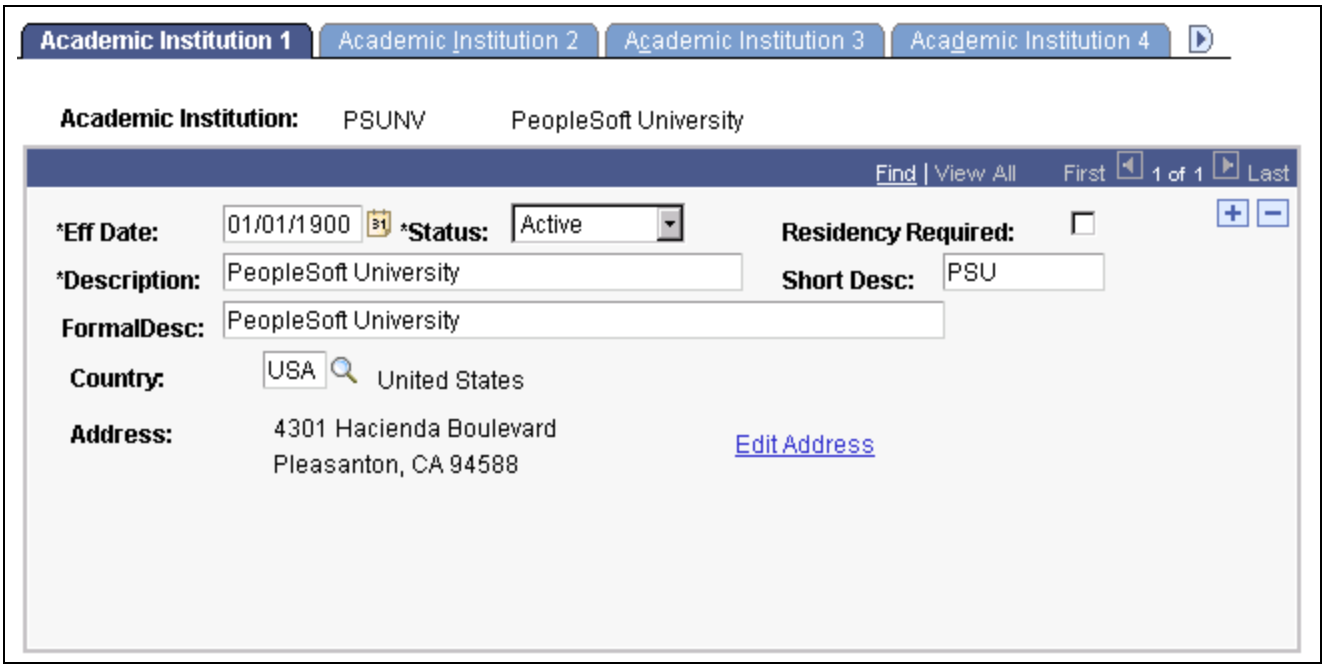
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Grading," Defining Grading Schemes

Pages Used to Define Academic Institutions

Page Name	Object Name	Navigation	Usage
Academic Institution 1	INSTITUTION_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 1	Define the name and location of the academic institutions.
Academic Institution 2	INSTITUTION_TABLE1	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 2	Set academic institution defaults for transfer credit processing and for courses.
Academic Institution 3	INSTITUTION_TABLE3	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 3	Set additional academic institution defaults and options for attendance tracking, cohort reporting, National Student Clearinghouse (NSC) reporting, and interoperability for learning management systems (LMS).
Academic Institution 4	INSTITUTION_TABLE4	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 4	Activate the Instructor Workload feature and establish high level limits, workload preferences, and default values for instructor workload at the institution.
Academic Institution 5	INSTITUTION_TABLE5	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 5	Set repeat-checking controls for academic institutions. The academic institution level is the highest level of control for the automatic Repeat Rule Checking COBOL/SQL process (SRPCERPT).
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6	Set up student administrative functionality that can be turned on and off, such as Canadian Reporting.

Defining the Name and Location of Academic Institutions

Access the Academic Institution 1 page.



Academic Institution 1 page

Residency Required Select to require residency data for students. Your selection appears in the Residency Required field on the Program 2 page for all academic programs within this academic institution. You can change the selection for specific academic programs. When you attempt to activate a student into a term, the Term Activation SQR process (SRTRMAC) checks whether a student's academic program requires that the student have residency data in the system. If it does, and the student does not have residency data in the system, the Term Activation process does not activate the student into the term. This subsequently blocks the student from class enrollment and tuition calculation.

Country Select the country where this academic institution is located. Exit the field to populate the page with variable address fields. The address fields that appear depend on the country selected. Enter the primary location of this academic institution into the applicable fields.

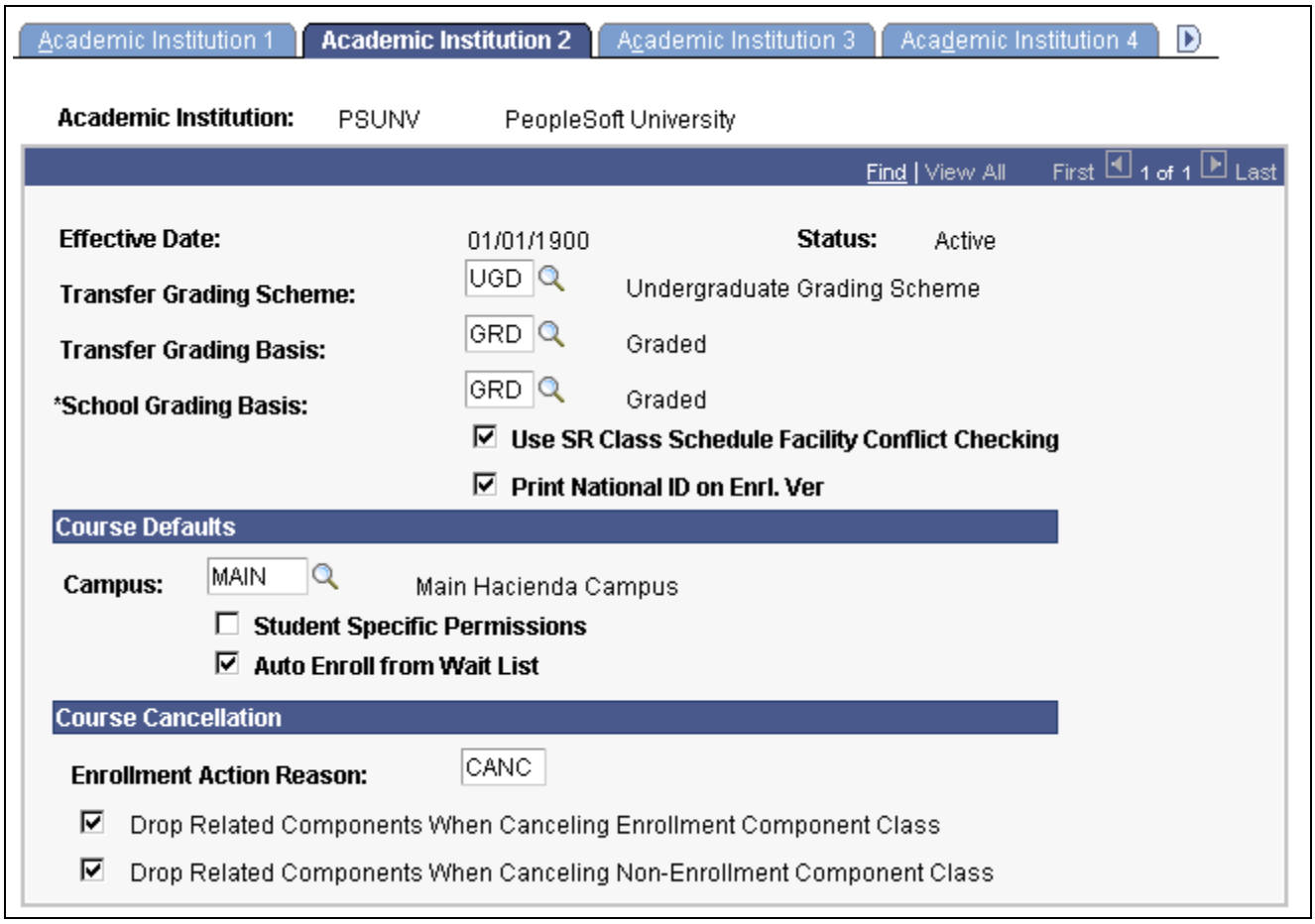
See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Identification Data," Setting Up Residency Rules

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

Setting Academic Institution Defaults

Access the Academic Institution 2 page.



Academic Institution 2 page

Transfer Grading Scheme Select the default grading scheme that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the Grading Scheme field on the Organization Affiliation page, based on the academic institution that you select on that page.

Transfer Grading Basis Select the default grading basis that applies to courses that students transfer from external organizations to this academic institution. Your selection appears in the Grading Basis field on the Organization Affiliation page, based on the academic institution that you select on that page.

School Grading Basis Currently not in use.

Use SR Class Schedule Facility Conflict Checking Select to indicate that the system uses internal facility conflict checking functionality for all campuses at this academic institution. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes components.

The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.

Note. This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.

Print National ID on Enrl. Ver (print national ID on enrollment verification) — Select to have the system display the student's national ID on the enrollment verification report. The system selects this check box by default.

Course Defaults

Use this group box to set default values for the course catalog and schedule of classes pages. These default values ease data entry. You can override these default values for individual courses and classes.

Campus — Select the default campus for all courses within this academic institution. The campus value appears by default in the course catalog and the schedule of classes.

Note. If this academic institution generally offers the same courses at more than one campus, PeopleSoft recommends that you do not enter a value for a default campus because courses defined for a particular campus can be scheduled only for that same campus.

Student Specific Permissions — Select to have all classes scheduled at this academic institution require that you generate permissions for students to enroll in classes. This check box value migrates to the Basic Data page of the Schedule New Course component, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.

Auto Enroll from Wait List — Select to have the system automatically enroll students from wait lists into classes whenever space becomes available in the classes and the wait list process is run. This check box value migrates to the Enrollment Control page of the Schedule New Course component, where it can be overridden.

Course Cancellation

Enrollment Action Reason — Enter the default enrollment action reason that the system posts to enrolled students' records whenever a class is canceled.

Drop Related Components When Canceling Enrollment Component Class — This check box is selected by default. Clear this check box if you do not want to drop related components when you cancel the enrollment component of a multiple component class.

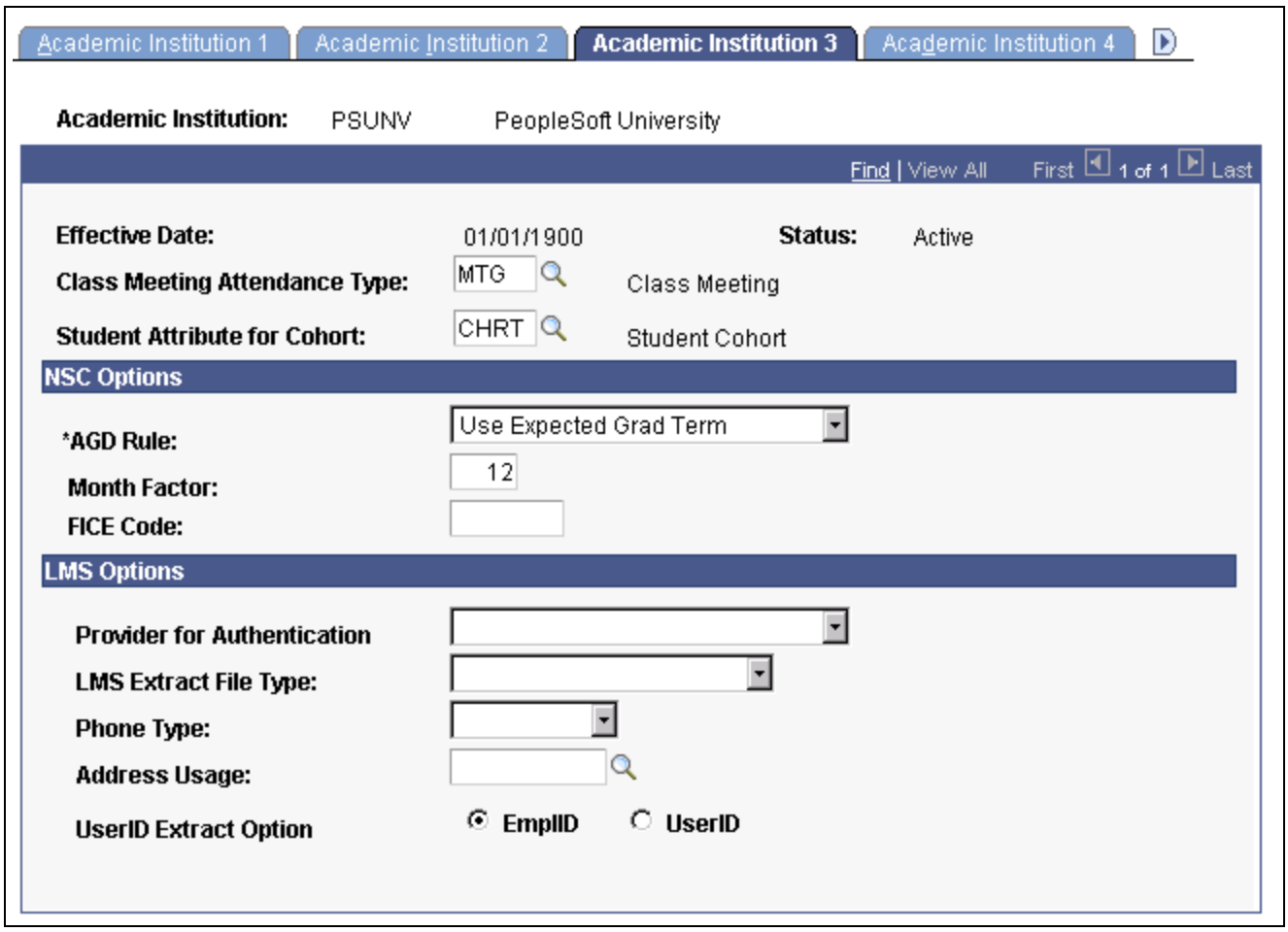
Drop Related Components When Canceling Non-Enrollment Component Class — This check box is selected by default. Clear this check box if you do not want to drop related components when canceling a non-enrollment component of a multiple component class.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

Setting Additional Institution Defaults and Options

Access the Academic Institution 3 page.



Academic Institution 3 page

Attendance and Cohort Defaults

Class Meeting Attendance Type

Select the default attendance type that this academic institution uses for generating attendance rosters. The attendance type indicates the type of attendance roster, such as *Class Meeting, Conference, Field Trip, Instructor Consultation,* or *Study Group.*

When you generate attendance rosters, the system uses this default attendance type along with the fields that you have selected for this attendance type to create the requested attendance rosters. After you generate the attendance rosters, you can change the attendance type for individual class meetings.

When you define the possible attendance rosters and applicable fields for each course component (through the Components page of the Course Catalog component), define all possible scenarios. Defining all possible scenarios ensures proper attendance roster generation if you decide at a later date to change the class meeting attendance type for this academic institution. This field is required for attendance roster batch generation.

Student Attribute for Cohort Select a default student attribute for cohort. Student attributes (such as cohort) are attached to a student's program record on the Student Attributes page in the Student Program/Plan component. If a student has an attribute on the Student Attributes page equal to the one set here, the Consolidate Academic Statistics COBOL SQL process (SRPCCONP) writes this common student attribute to the student's consolidated academic statistics record, which you can then prompt against for reporting purposes. The Consolidate Academic Statistics process searches for only the student attribute that you specify here. If the process does not find this student attribute on the student's program record, then the process does not include a student attribute for cohort on the student's consolidated statistics record. If the process finds multiple occurrences of this student attribute on the student's program record, then it writes the one with the lowest primacy number to the student's consolidated statistics record.

NSC Options

Use the NSC Options group box to define how the NSC Extract SQR process (SRNSLCEX) calculates a student's anticipated graduation date (AGD) and to define the default Federal Interagency Committee on Education (FICE) code that is in the NSC extract for this academic institution.

AGD Rule Indicate how you want the NSC Extract process to determine a student's AGD. By reporting a student's AGD to the NSC, the NSC can provide this critical information to lending institutions so that they know when to begin collecting loans from students. Any modification to these translate values requires a substantial programming effort. Select from these values:

Use Expected Grad Term: Select to have the NSC Extract process use the end date of the term that a student is expected to graduate as the basis for a student's AGD. Define a student's expected graduation term on the Student Program page.

Use Term End Date: Select to have the NSC Extract process use the end date of the term that the institution is reporting to the NSC as the basis for a student's AGD.

Month Factor Enter the number of months that you want the NSC Extract process to add to the date determined by the AGD rule when the process calculates a student's AGD. For example, use the term end date plus a month factor of 12 to report to the NSC that a student's anticipated graduation date is a year beyond the end date of the term that the institution reports to the NSC.

FICE Code Enter the default FICE code that you want to appear in the NSC extract for this academic institution. This value appears on the NSC page, where you can override it for each branch code of an academic institution.

LMS Options

Use the LMS Options group box to specify LMS file type default values and personal data extract parameters.

Provider for Authentication If all or most of the classes are LMS classes requiring self-service user authentication, enter a provider for authentication. The provider serves as a high-level default. When this field is blank on the Components page of the Course Catalog component, the value entered on the Institution page defaults to the schedule of classes when a class is scheduled. Providers are defined on the LMS Provider Setup page.

LMS Extract File Type Enter an LMS file type of *Blackboard CourseInfo 4*, *WebCT API Input Format*, or *XML V1.01* that serves as a high-level default when all or most of the classes are LMS classes. When the field is blank on the Components page of the Course Catalog component, the value entered here appears on the schedule of classes when a class is scheduled. Any modification to these translate values requires a substantial programming effort.

Phone Type and **Address Usage** Enter a phone type and address usage to specify demographic information for the Person object. If you select the People option on the LMS Extract Output page, the values entered here determine which phone and address information is exported. Because phone numbers and addresses are stored as separate records in Campus Community, you may actually choose to retrieve an individual's work phone number and home address. Remember that if the phone type that you specify is not found for the individual, no phone number is extracted. This is different from an address, where you can specify an address usage or preferred selection order where the first one found is extracted. With a phone type, you can enter only one choice; make it a target that is likely to be found for every person object in the extract process. PeopleSoft suggests that you select a voice line because the system automatically extracts fax lines in addition to whatever you select here.

UserID Extract Option Identify whether the LMS extract should use the student or instructor's *EmplID* or *UserID*.

See Also

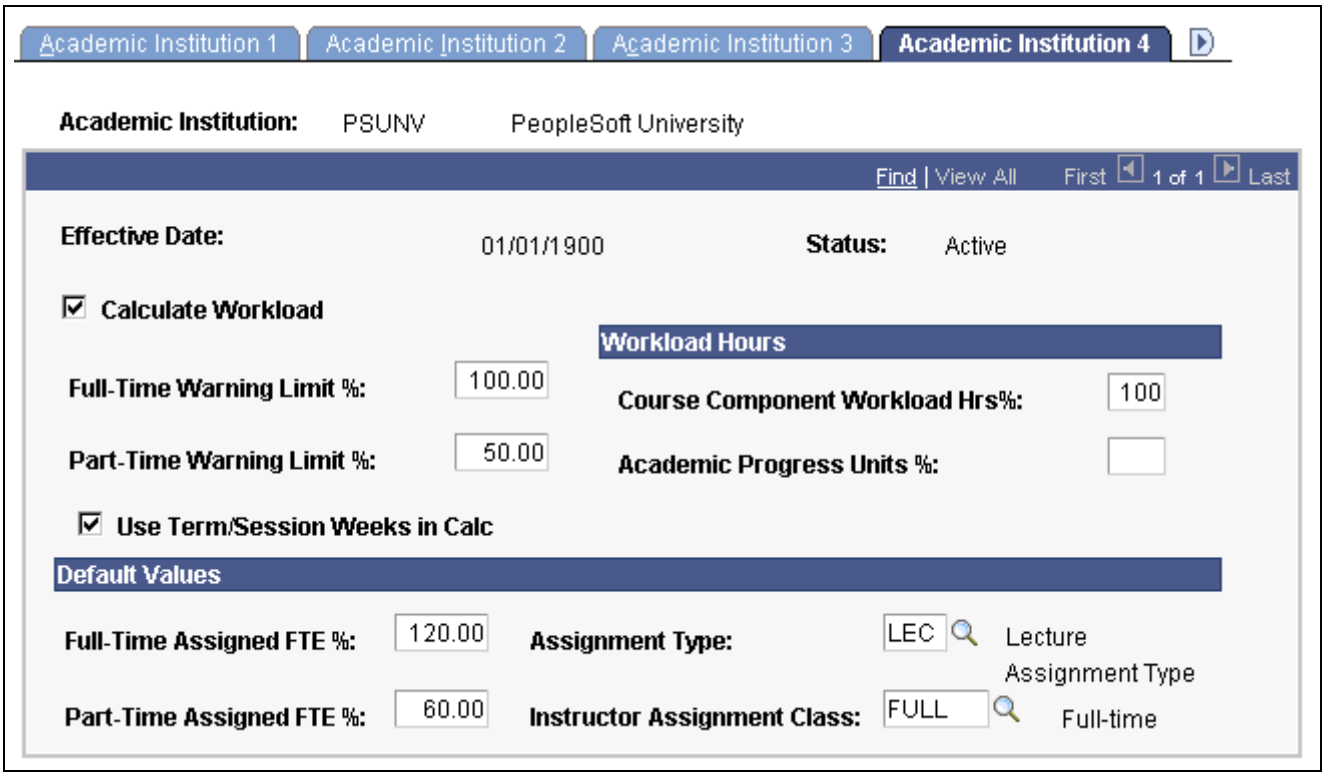
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Tracking Attendance"

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Consolidating and Reporting Academic Statistics"

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

Activating Set Instructor Workload

Access the Academic Institution 4 page.



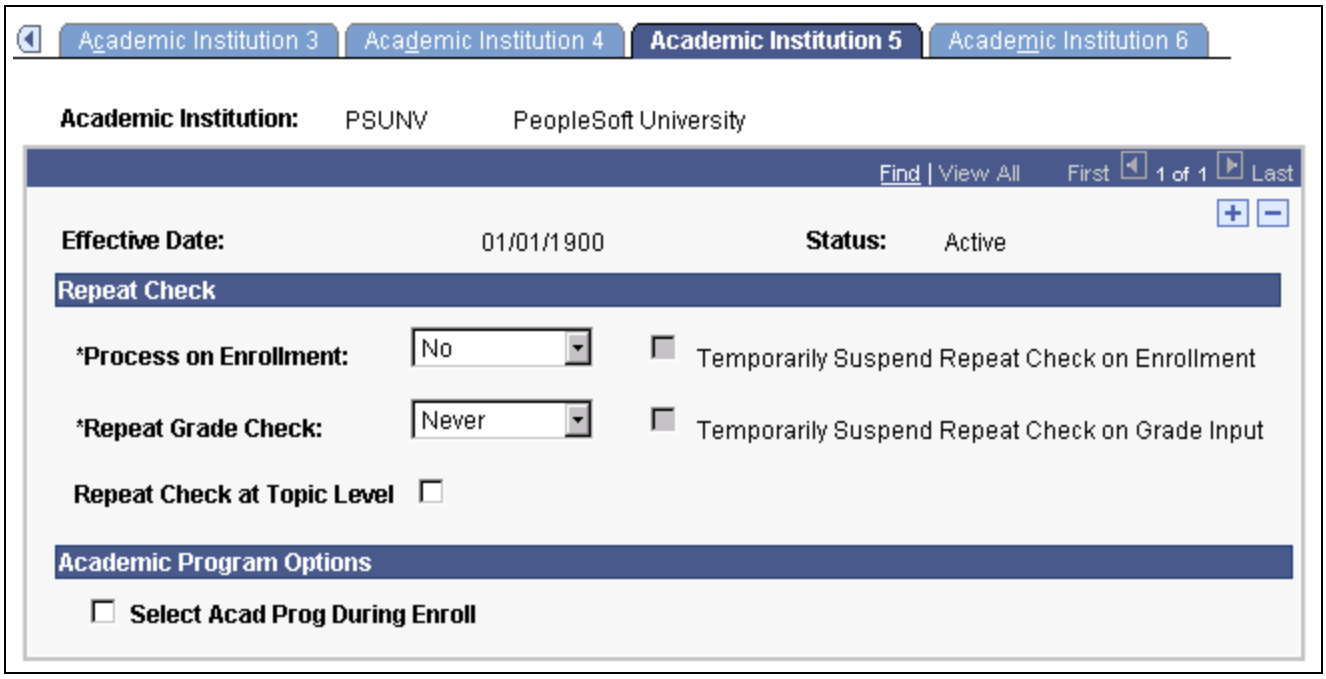
Academic Institution 4 page

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Instructor Workload"

Setting Repeat Checking Controls

Access the Academic Institution 5 page.



Academic Institution 5 page

Select Acad Prog During Enroll (select academic program during enrollment) Select this check box to enable the Academic Program field on all enrollment pages that allow users to select an academic program to associate with each class. The field is only available within enrollment when a student is matriculated in more than one program. Clearing this check box hides the Academic Program field on all enrollment pages and associates the student's primary academic program with each class.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Repeat Checking"

Setting Up Student Administration Features

Access the Academic Institution 6 page.

Academic Institution 6 page

Australia	Select to enable Australian DEST, HECS, Centerlink, and TAC functionality.
Canada	Select to enable Canadian government reporting.
New Zealand	Select to enable New Zealand Catalog, SDR, EFTS, StudyLink, and NZQA functionality.
Netherlands	Select to enable Netherlands Higher Education functionality.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "(CAN) Setting Up Government Reporting"

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "(NLD) Managing Student Higher Education Information"

Setting Up Campuses

To set up campuses, use the Campus Table component (CAMPUS_TABLE).

A campus is an entity, usually associated with a separate physical administrative unit, that belongs to a single academic institution, uses the same course catalog, and produces a common transcript for students within the same academic career. Campus Solutions enable you to define as many campuses within an academic institution as necessary to meet your business needs.

This section lists prerequisites and discusses how to define campuses.

Prerequisites

Before you establish campuses, define these items:

- Establishment IDs.
  - In Human Resources, you use the Location Table component to define work locations, but you also use the Location Table component to define general campus locations within Campus Solutions.

    These campus locations are synonymous with central locations or addresses for the various campuses that comprise a college or university. If you have one main campus, you probably have a single location. However, if you offer classes in satellite locations, or if you have geographically separate entities that make up the institution, you must define multiple locations.
  - To add locations in Campus Solutions, you must create at least one establishment value.

    If you are implementing or have implemented Human Resources, these establishment values should be defined because the human resources department typically sets them up.
- Locations.

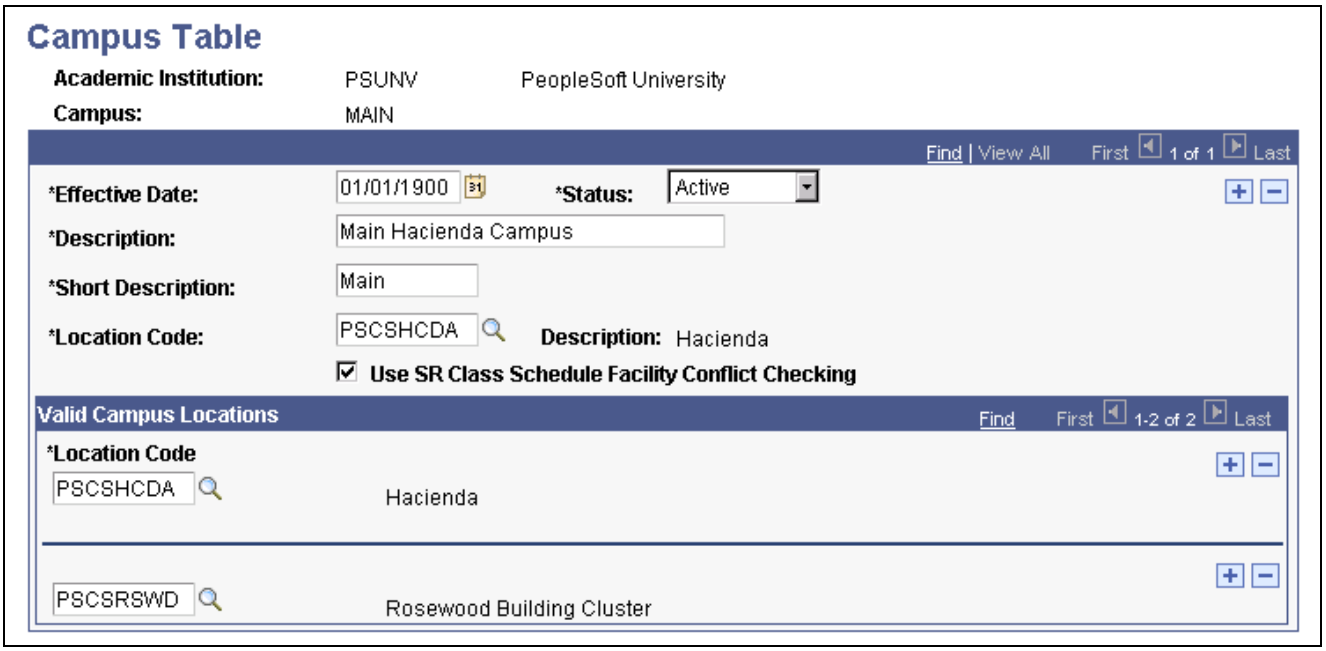
  You define the physical locations of the campuses at the institution on the Location Table page. Each location requires an establishment ID.

Page Used to Set Up Campuses

Page Name	Object Name	Navigation	Usage
Campus Table	CAMPUS_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Campus Table	Define each campus that constitutes an academic institution and indicate which locations are valid for a particular campus.

Defining Campuses

Access the Campus Table page.



Campus Table page

Use SR Class Schedule Facility Conflict Checking Select to enable the system to use internal facility conflict checking functionality for this campus. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes.

The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.

Note. This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.

Valid Campus Locations

Location Code (upper) Select a location code for the primary location of the campus. Define locations on the Location Table page in Human Resources.

Location Code (lower) Select all valid location codes for this campus. When creating courses or scheduling classes at a particular campus, the system displays only the values that you list here.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Designing Campus Community," Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements

Defining Academic Careers

To set up academic careers, use the Academic Career Table component (ACAD_CAREER_TBL).

This section provides an overview of academic careers and discusses how to:

- Describe academic career parameters.
- Set additional academic career parameters.
- Set up academic career pointers.
- Set repeat checking controls for academic careers.

Understanding Academic Careers

Academic career is a concept used in Campus Solutions to designate all course work undertaken by a student at an academic institution, which you group together in a single student record. For example, a university that has an undergraduate school, a graduate school, and several professional schools can define an undergraduate career, graduate career, and a separate career for each professional school (law, medical, dental, and so on). You might also make extended education or continuing education its own academic career, or make separate academic careers for every school or college at the undergraduate level.

Academic careers have these common characteristics:

- All credit is granted under a common unit type, such as semester hours or quarter hours.
- There is a single repeat scheme.

Use the Academic Career component to create and define academic careers and all the parameters of each academic career. Academic career values are delivered with the system as translate values. If, when you are establishing academic careers, you find that you must define more academic career values, add the new values to the translate table for academic careers. The translate table for academic careers is in the ACAD_CAREER field in PeopleSoft Application Designer.

Warning! For online analytical processing (OLAP) purposes, it is important to carefully consider the code that you assign to each academic career in the translate table. When you design OLAP cubes for PowerPlay—a third-party application delivered with Campus Solutions—avoid having the same code for more than one dimension of the cube. For example, you do not want to use the same code, such as LAU (liberal arts undergraduate), for the academic career and the academic program.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing to Consolidate and Report Academic Statistics," Setting Up Academic Careers and Academic Programs for Reporting

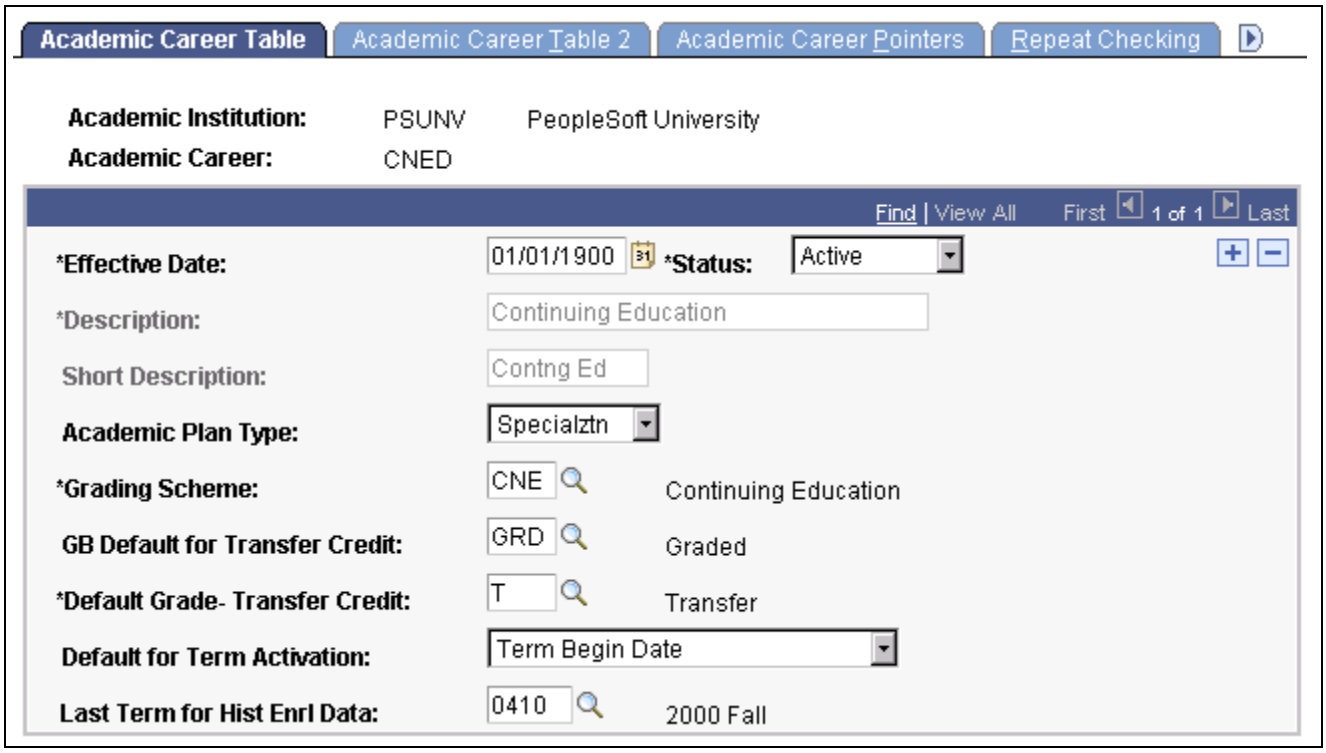
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Consolidating and Reporting Academic Statistics," Understanding Consolidating and Reporting Academic Statistics

Pages Used to Define Academic Careers

Page Name	Object Name	Navigation	Usage
Academic Career Table	ACAD_CAREER_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table	Describe academic careers and set parameters for each academic career, such as grading scheme.
Academic Career Table 2	ACAD_CAREER_TBL2	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Table 2	Set additional academic career parameters, such as default term unit types.
Academic Career Pointers	ACAD_CAR_PTRS	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Academic Career Pointers	Set up academic career pointers, which specify whether a student within an academic career can enroll in courses from another academic career at a particular academic institution.
Repeat Checking	ACAD_CAR_RPT_CHK	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Repeat Checking	Set repeat checking controls at the academic career level. Also, link repeat rules to academic careers.
Self Service Options	SSR_ACDCAR_SELFSRV	Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Self Service Options	Indicate if you want users to have the ability to select the students's academic program to be assigned to an enrollment record. Indicate how you want to enforce enrollment appointments for self-service enrollment within this academic career.

Describing Academic Career Parameters

Access the Academic Career Table page.



Academic Career Table page

Academic Plan Type Select an academic plan type to indicate the highest level academic plan that is valid within this academic career—for example, *Major, Minor,* or *Concentration.* You can modify these translate values.

There is no programming associated with this field, but the institution can define restrictions based on the value here. For example, if this value is set to *Major* for the undergraduate career, then students in that academic career could take academic plans involving majors, minors, and concentrations. But if this value is set to *Concentration* for the continuing education career, then the institution could create restrictions so that students in that academic career could not declare a major.

Grading Scheme Select the grading scheme for this academic career. This grading scheme defines the valid grading bases for this academic career. The system displays this grading scheme by default on the Program 1 page for academic programs within this academic career. You can override the default grading scheme for each academic program. Define grading scheme values on the Grading Scheme Table page.

GB Default for Transfer Credit (grading basis default for transfer credit) Select the default grading basis for credit transferred to this academic career. This grading basis appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.

Default Grade-Transfer Credit Select the default grade for credit transferred to this academic career. This grade appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.

Default for Term Activation Select either *Term Begin Date* or *Term End Date*. The value you select here determines the default value that appears on the Term Table page. The date specified determines the last date for which a student can be term activated.

Last Term for Hist Enrl Data (last term for historical enrollment data)

Select the last term for historical enrollment data. The system uses this value in conjunction with the values entered for a student on the Historical Course Enrollment page to determine which historical enrollment information gets printed on a student's transcript. This field restricts historical enrollment data to terms less than or equal to the value that you specify. Therefore, set this field value to the latest term possible for historical enrollment records. You can include historical enrollment on transcripts by selecting the corresponding option on the Enrollment/Statistics page of the Transcript Type component.

Warning! The system populates the Last Term for Hist Enrl Data field with *0000.* However, term 0000 does not allow historical enrollment data to appear on a transcript. If you want historical enrollment data to appear on a student's transcript, you must select another term value.

See Also

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Getting Started with PeopleSoft Enterprise Student Financials"

Chapter 3, "Preparing for Data Conversion," page 37

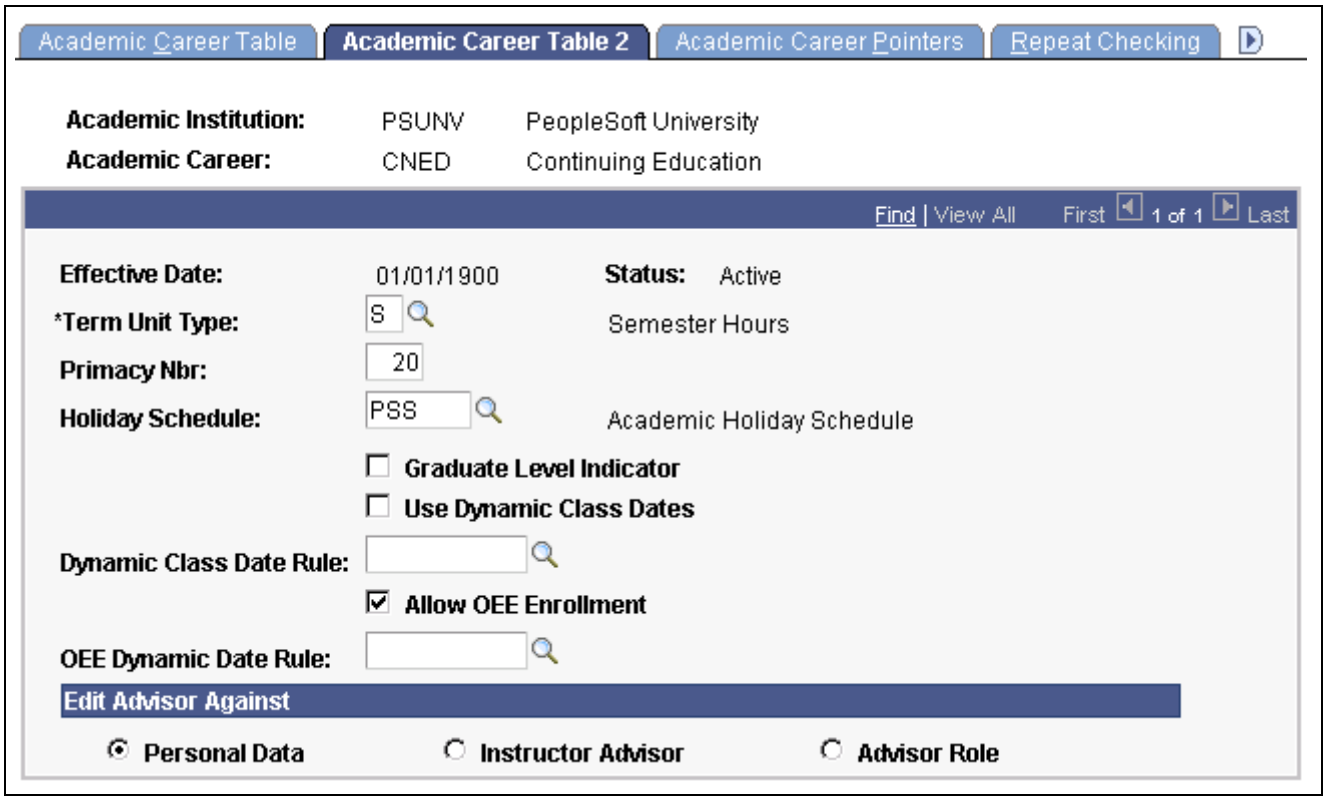
Chapter 8, "Defining Dynamic Academic Calendars," page 139

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Using Enrollment Related Processes," Creating Historical Enrollment Records

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Transcripts," Designating Enrollment and Statistics Data

Setting Additional Academic Career Parameters

Access the Academic Career Table 2 page.



Academic Career Table 2 page

Term Unit Type Select a term unit type to indicate what kind of units are calculated for this academic career. Values for this field are delivered with the system as translate values. These translate values can be modified.

Note. When processing transfer credit between academic careers with different term unit types, use the Unit Conversion Table page first to set up unit conversion rules.

Primacy Nbr (primacy number) Enter the primacy number for this academic career. The system uses the number to determine a student's primary academic career when you consolidate academic statistics. The system also uses the number to prioritize financial aid applications when students are enrolled in multiple academic careers at the same time. The lowest number takes precedence.

Note. Coordinate the numbering with Financial Aid to avoid conflicts.

Holiday Schedule Select the holiday schedule for this academic career. The holiday schedule prevents scheduling classes for this academic career on designated holidays.

Campus Solutions and Human Resources share the same holiday schedule. Each division of the institution probably has entries on the calendar because the information contained on the calendar is used for different purposes. Calendars are used to schedule classes and events.

Graduate Level Indicator Select to indicate that this academic career qualifies as graduate level for tax reporting purposes. You can then include this field in the NSC reporting process (by using the NSC Report page) to indicate on the NSC Extract report whether a student was enrolled at the graduate level during a reporting period

or term. Otherwise, this field is informational only, and the institution can use it for various reporting purposes.

Note. The NSC offers an optional service to institutions to assist them in fulfilling the reporting guidelines of the Taxpayer Relief Act of 1997. NSC member schools that choose to use this service are required to add a graduate level indicator to their reports, and should therefore select this option and select the corresponding option on the NSC report page.

Use Dynamic Class Dates Select to make available the Dynamic Date page of the Academic Program Table component. You use the Dynamic Date page to set up reasons and penalties for canceling, withdrawing from, and dropping classes. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars, and they apply to students according to their academic program.

Dynamic Class Date Rule Select a dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page. This field prompts you with only the dynamic class date rules that have *not* been designated for OEE enrollment on the Dynamic Class Dates page.

Allow OEE Enrollment (allow open entry/exit enrollment) Select to have all course offerings that you tie to this academic career permit, by default, the scheduling of OEE class sections. You can override this default on an offering-by-offering basis on the Offerings page of the Course Catalog component. If you select this check box, the OEE Dynamic Date Rule field becomes available.

OEE Dynamic Date Rule (open entry/exit dynamic date rule) An OEE dynamic date rule is a *dynamic class date rule* that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an OEE class. This field is available for edit only if you select the Allow OEE Enrollment check box on the preceding page of this component. Select an OEE dynamic date rule to have the system assign that rule to all course offerings that you tie to this academic career. You can override this default rule on an offering-by-offering basis through the Offerings page of the Course Catalog component. This field prompts you with only the dynamic class date rules that have been designated for OEE enrollment on the Dynamic Class Dates page.

Edit Advisor Against Indicate which view the system should use when prompting you to assign an advisor for a student in this academic career. You assign advisors to students on the Student Advisor page. Your selection here appears on the Program 2 page. Select from these options:

Personal Data: Prompts against all people with a PERSONAL_DATA record in the PeopleSoft system.

Instructor Advisor: Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for this academic career.

Advisor Role: Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for this academic career.

See Also

Chapter 8, "Defining Dynamic Academic Calendars," page 139

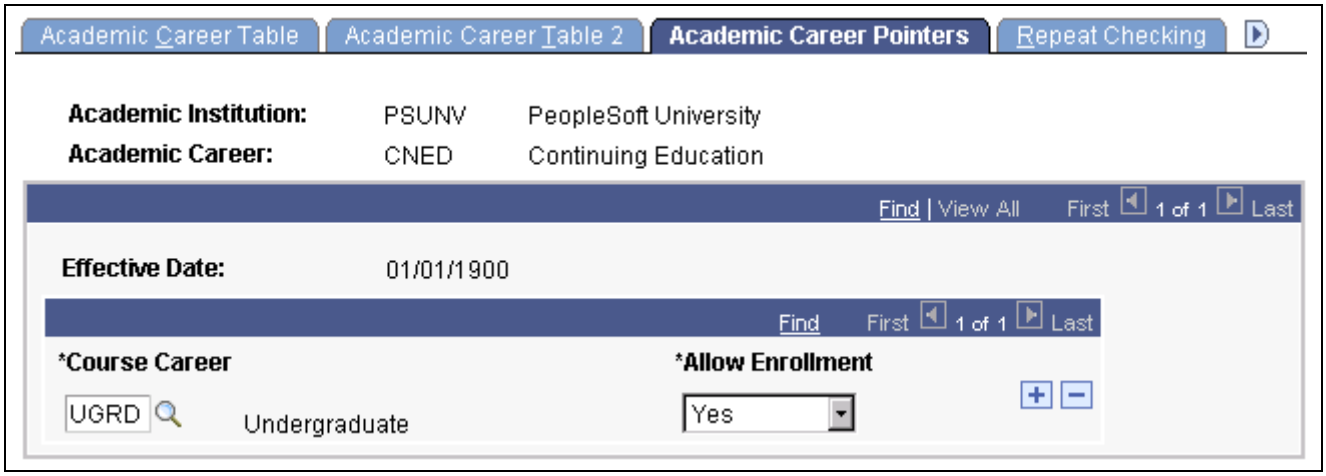
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes"

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Consolidating and Reporting Academic Statistics"

PeopleSoft Enterprise Human Resources Management System documentation

Setting Up Academic Career Pointers

Access the Academic Career Pointers page.



Academic Career Pointers page

On the Career Pointer Exception page, you can set specific exceptions to the academic career pointers on the Academic Career Pointers page. For example, you might want to set the academic career pointers for the undergraduate career so that undergraduate students can, with permission, enroll in graduate, graduate business, and law courses; can always enroll in undergraduate and continuing education courses; and can never enroll in courses from any other academic career.

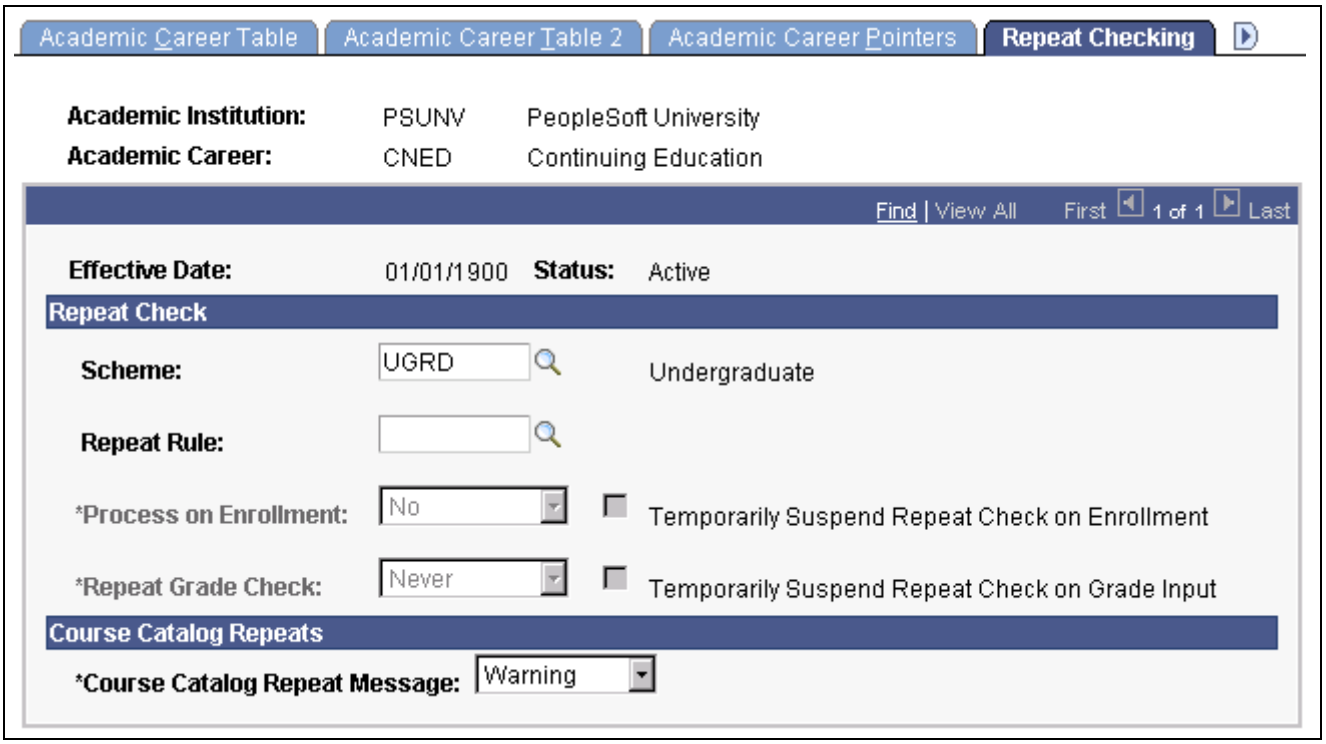
Note. Enter values for all possible academic careers, including the ones in which the student cannot enroll in courses. Although the system permits you to omit academic careers in which the student cannot enroll, PeopleSoft does not recommend this practice.

Course Career Select each academic career that you have defined for a particular academic institution.

Allow Enrollment Select whether a student can enroll in that academic career. Allow enrollment values are translate values. Values are: *Yes, No,* and *Permission.* Selecting *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.

Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page.



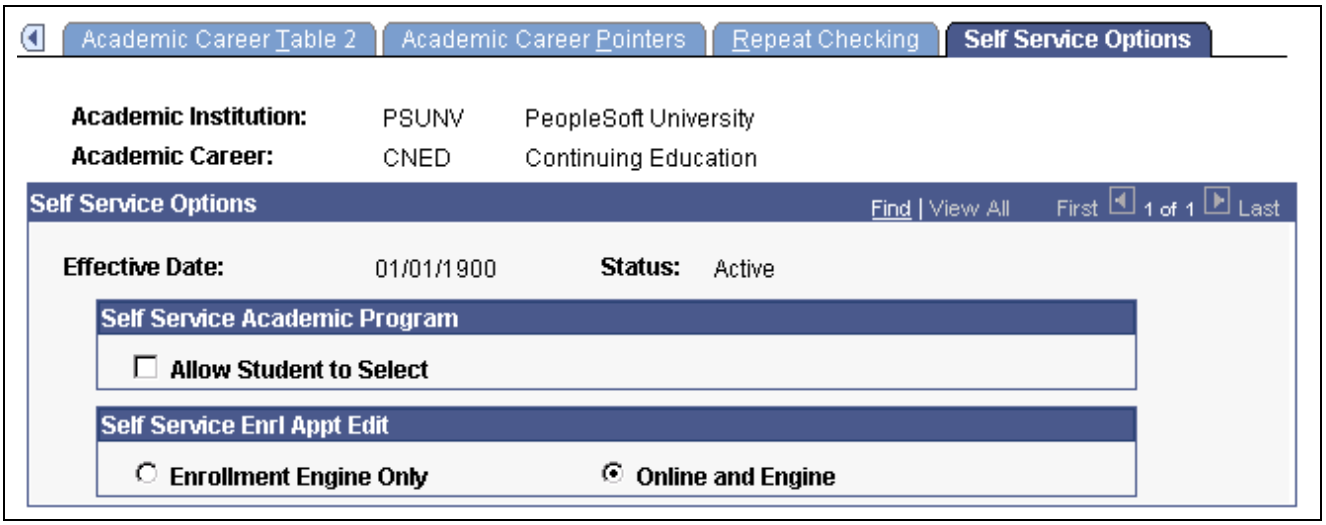
Repeat Checking page

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Repeat Checking"

Setting Up Self-Service Options

Access the Self Service Options page.



Self Service Options page

Self Service Enrl Appt Edit (self-service enrollment appointment edit)

Select one of the following options:

Enrollment Engine Only: Select this option to have the enrollment engine enforce enrollment appointments in self-service enrollment only when a

student submits an enrollment request with an action of enroll or swap for processing by the enrollment engine.

Online and Engine: Select this option to have the system validate enrollment appointments in self-service enrollment when a student selects a term on the Select Enrollment Term Search page, and when the student enters or selects a class number on the Add Classes, Drop/Update Class, or Swap Classes pages. If the student does not have a valid enrollment appointment or if the open enrollment period for the session that the student is trying to enroll in has not yet begun, these edits prevent the student from submitting enrollment requests. When a qualifying student does submit an enrollment request with an action of enroll or swap, the enrollment engine still enforces enrollment appointments during processing. The system selects this option by default.

Note. Modification of these translate values requires significant programming effort.

Creating Career Pointer Exception Rules

To set up career pointer exception rules, use the Career Pointer Exception Rule component (CAR_PTR_EXCEPTIONS).

This section provides an overview of career pointer exception rules and discusses how to define career pointer exception rules.

Understanding Career Pointer Exception Rules

Career pointer exception rules enable you to define exceptions to the regular academic career pointer guidelines from the Academic Career Pointers page. When students in academic programs with career pointer exception rules attempt to enroll in courses, the enrollment engine looks at the career pointer exception rule as defined on the Career Pointer Exception Rule page before proceeding to the academic career pointers as defined on the Academic Career Pointers page.

You can create career pointer exception rules to define the academic groups, subject areas, and catalog numbers into which a student can enroll. Then you can connect these career pointer exception rules to academic programs as necessary. Career pointer exception rules are connected to academic programs with the Career Pointer Exception Rule field on the Program 2 page. If there is no value in that field, the enrollment engine checks only the academic career pointer guidelines.

This list summarizes the system checks that occur during enrollment engine processing:

1. The enrollment engine checks the academic group, subject area, and catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

   The enrollment engine verifies that the catalog number of the requested course is less than or equal to the maximum catalog number for that academic group and subject area combination. If the enrollment engine finds no match, the check proceeds to the next step.

2. The enrollment engine checks the academic group and subject area of the requested course plus a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

   The enrollment engine verifies that the catalog numbers for that entire academic group and subject area combination have not been restricted. If the enrollment engine finds no match, the check proceeds to the next step.

3. The enrollment engine checks the academic group of the requested course, a subject area with a value of null, and the catalog number of the requested course against the values entered on the Career Pointer Exception Rule page.

   The enrollment engine verifies that the catalog number of the requested course is less than or equal to the maximum allowable catalog number of that academic group. If the enrollment engine finds no match, the check proceeds to the last step.

4. The enrollment engine checks the academic group of the requested course, subject area with a value of null, and a catalog number with a value of null against the values entered on the Career Pointer Exception Rule page.

   The enrollment engine verifies that all subject areas and catalog numbers for the entire academic group have not been restricted. If the enrollment engine finds no match, it uses for the enrollment request the academic career pointers as defined on the Academic Career Pointers page.

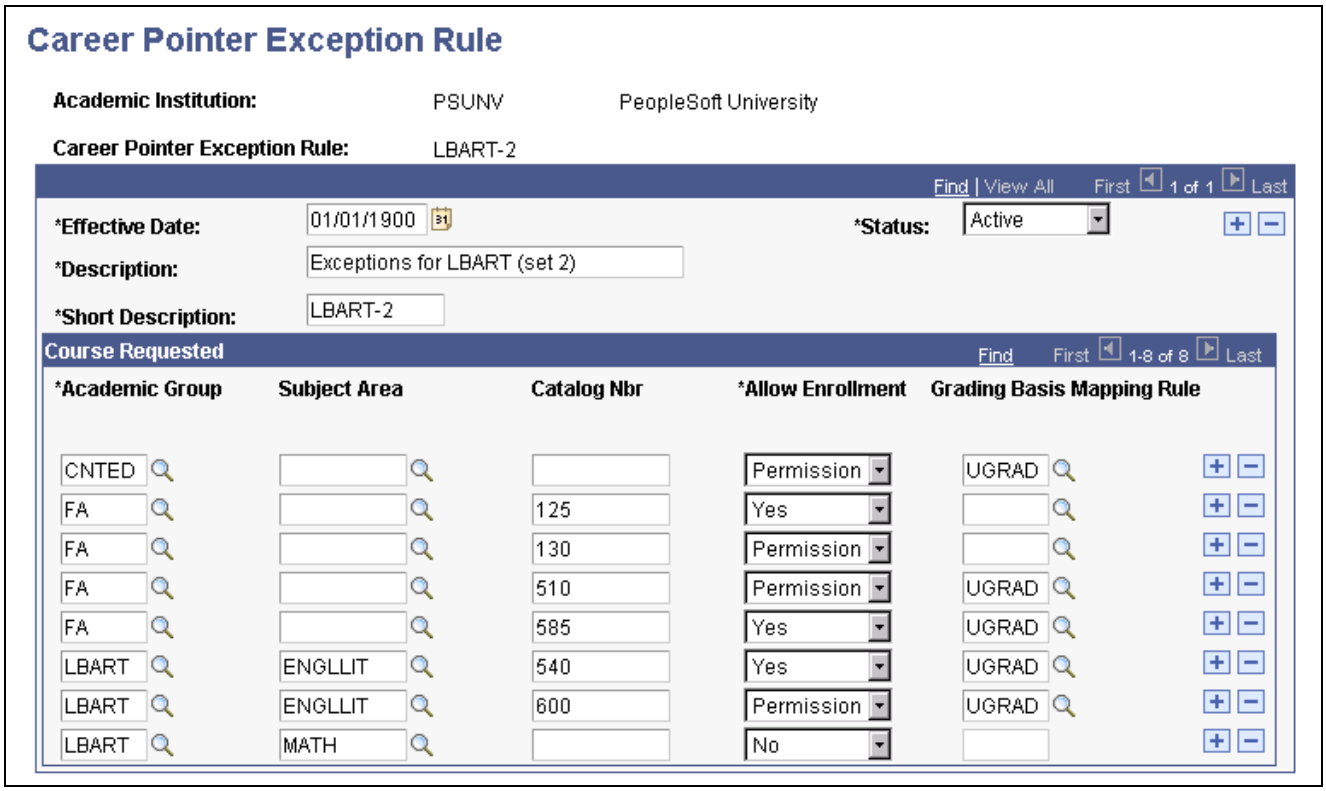
This series of checks assures that the student, according to her or his academic career, is permitted to enroll in the requested course.

Page Used to Create Career Pointer Exception Rules

Page Name	Object Name	Navigation	Usage
Career Pointer Exception Rule	CAR_PTR_EXCEPTIONS	Set Up SACR, Foundation Tables Academic Structure, Career Pointer Exception Rule	Define all possible career pointer exception rules—the exceptions to the academic career pointer guidelines established on the Academic Career Pointers page. After you define the career pointer exception rules, the institution can attach them to academic programs to ensure that students within an academic program can enroll in permissible courses only.

Defining Career Pointer Exception Rules

Access the Career Pointer Exception Rule page.



Career Pointer Exception Rule page

Academic Group Select the academic group in which a student can request a course.

Subject Area Select the subject area within the academic group in which a student can request a course. To indicate all subject areas, leave this field blank. Otherwise, insert rows to specify each subject area within the academic group for which you want to create a rule.

Catalog Nbr (catalog number) Enter the maximum catalog number within the subject area or academic group in which a student can request a course. To indicate all catalog numbers within a subject area or academic group, leave this field blank.

Allow Enrollment Select whether a student is permitted enrollment in courses that match the criteria specified in the previous fields. Allow enrollment values are delivered with the system as translate values. Values are: *Yes, No,* and *Permission.* Selecting *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.

Grading Basis Mapping Rule Select the grading basis mapping rule for these requested courses. Define grading basis mapping rule values on the Grading Basis Exception Rule page. The system uses the grading basis mapping rule to translate grades earned in another academic group to valid grades within a student's academic career.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Managing the Schedule of Classes," Understanding Class Permissions

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Grading," Defining Grading Basis Exception Rules

Defining Academic Level and Load Rules

To set up academic level and load rules, use the Level/Load Rules Table component (LVL_ST_RULE_TBL).

Use the Level/Load Rules component to define academic level and academic load rules for every academic career at your institution. Various system processes use these rules to determine a student's academic level and academic load—processes such as class enrollment, financial aid reporting, and consolidating academic statistics.

This section discusses how to:

- Define academic level and load determination values.
- Define level rules.
- Define load rules.
- Define contiguous term load rules.

See Also

PeopleSoft Enterprise Financial Aid 8.9 PeopleBook, "Managing Financial Aid Terms"

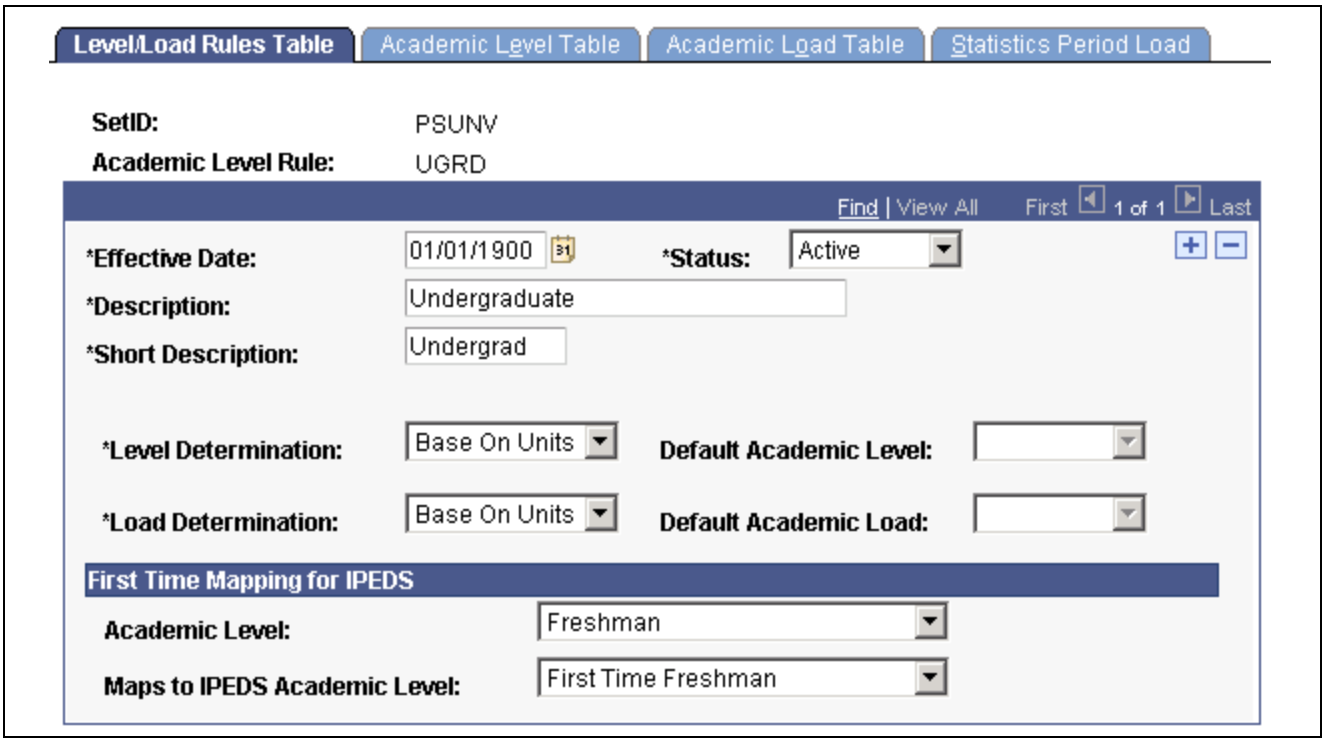
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Consolidating and Reporting Academic Statistics"

Pages Used to Define Academic Level and Load Rules

Page Name	Object Name	Navigation	Usage
Level/Load Rules Table	LVL_ST_RULE_TBL	Set Up SACR, Foundation Tables, Academic Structure	For each academic level rule, specify how the system processes must determine a student's academic level and academic load, and define how the Consolidate Academic Statistics process must map academic levels to Integrated Postsecondary Education Data System (IPEDS) academic levels.
Academic Level Table	ACAD_LEVEL_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table	Associate academic levels with cumulative units or terms to link the academic levels to the corresponding National Student Loan Data System (NSLDS) loan years, and to link academic levels with federal direct lending years.
Academic Load Table	ACAD_LOAD_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table	Define academic load rules, financial aid load rules, and National Student Clearinghouse academic load rules.
Statistics Period Load	ACAD_LOAD2_TBL	Set Up SACR, Foundation Tables, Academic Structure, Level/Load Rules Table	For contiguous terms, define the academic load rules, National Student Clearinghouse academic load rules, and financial aid load rules. Contiguous terms are consecutive terms in which you combine academic load information.

Defining Academic Level and Load Determination Values

Access the Level/Load Rules Table page.



Level/Load Rules Table page

Status Select a status for this academic level rule. Select *Active* when adding a new academic level rule. Select *Inactive* only if your institution no longer uses this academic level rule.

Description and **Short Description** Enter a description and short description for the academic level rule.

Level Determination Select how the academic level is determined for a student's STDNT_CAR_TERM record during term activation (in the background or online). Levels can be calculated in one of four ways:

Base on Units: Select to have the system assign an academic level based on the student's cumulative units (those designated as earn credit). The system includes articulated transfer units in this count.

Default: Select to have the system assign an academic level for each term based on the previous STDNT_CAR_TERM record academic level. If you select this value, the system requires you to enter a value in the Default Academic Level field.

Manually Input: Select to manually assign an academic level for each student and each term on the Term Activation page. After you manually assign an academic level for the student's initial term activation record, the original value automatically copies forward (and never increments) during all future online or batch term activation processes. For some programs, this may be the behavior that you want (for example, Graduate is an academic level that you may want to always assign to graduate students, regardless of their progress). On the other hand, you may have programs to which you want to initially assign the value manually but also to manually update it each term.

Warning! If you select *Manually Input* you must assign an academic level on the Term Activation page. Although students in programs assigned to a manual level and load rule can be included in the batch process (depending on the selection criteria used), the process assigns a system generated level value of *NST.*

Term Progression: Select to have the system assign academic level based on the student's cumulative terms. The system counts all terms that have a STDNT_CAR_TERM record. The system includes transfer terms that have term activation records in this count.

Default Academic Level This is a required field if you selected *Default* in the Level Determination field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that no prior STDNT_CAR_TERM record exists from which the system can copy the academic level. Values for this field are delivered with your system as translate values. You can modify these values.

Load Determination Select how the system calculates academic load. Academic load can be entered manually for a student on the Term Activation page. Select one of the following options:

Base on Units: Select to have the system assign an academic load based on the student's cumulative units (those designated as earn credit). The system includes articulated transfer units in this count.

Default: Select to have the system assign an academic load for each term based on the previous STDNT_CAR_TERM record academic load. If you select *Default,* the system requires you to enter a value in the Default Academic Load field.

Manually Input: Select to manually assign an academic load for each student and each term on the Term Activation page.

(AUS) *Units By Level:* You must select this value for all academic level rules that use the HECS feature. Defining units by level is required before you can calculate a student's HECS load factor. Selecting this value enables the Level Dependent Load Rules page, which you will use instead of the Academic Load Table page.

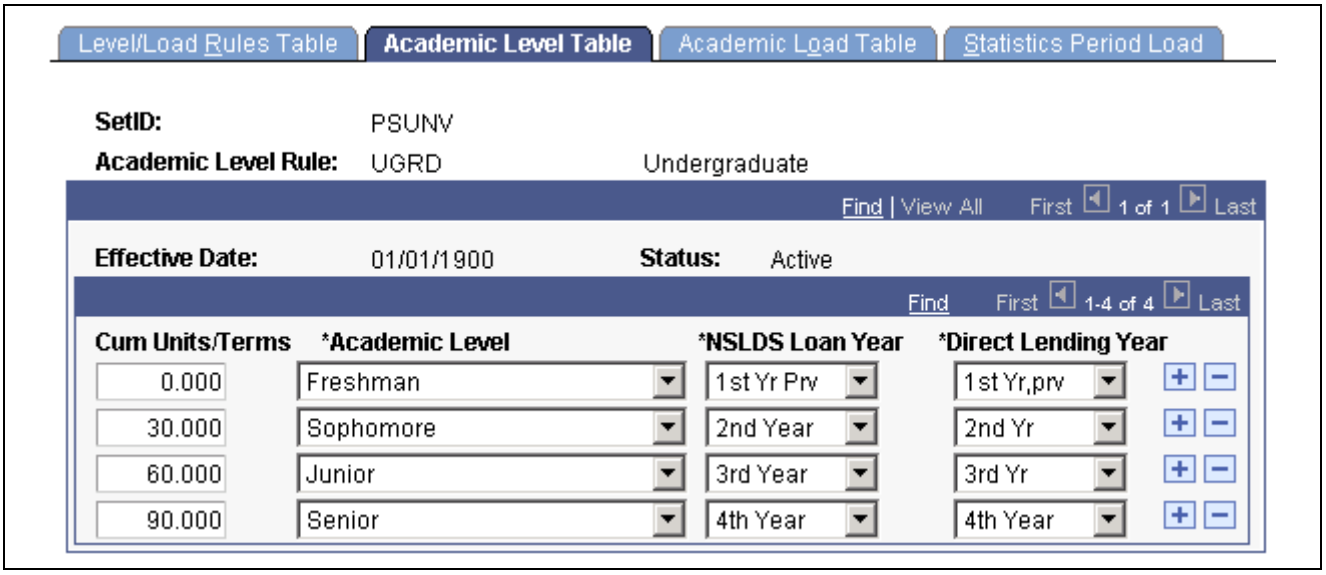
Default Academic Load This is a required field if you selected *Default* in the Load Determination field. The system assigns this default value to the STDNT_CAR_TERM record during term activation in the event that no STDNT_CAR_TERM record exists from which the system can copy the academic load. Values for this field are delivered with your system as translate values. You can modify these values.

When you run the Consolidate Academic Statistics process for an academic statistics period for which you have set the Academic Load Rule field on the Academic Statistics Period page to *Term Load Rule Applies,* and you have set the Load Determination field on this page to *Base on Units,* the process uses the academic load rules from the Academic Level Table page to determine a student's academic load, National Student Clearinghouse (NSC) academic load, and financial aid load. If you have set the Load Determination field on this page to *Manually Input* or *Default,* the Consolidate Academic Statistics process uses the student's career-term record or the value in the Default Academic Load field to determine the student's academic load (regardless

of the setting for the Academic Load Rule field on the Academic Statistics Period page).

Defining Level Rules

Access the Academic Level Table page.



Academic Level Table page

Cum Units/Terms (cumulative units/terms)
Enter the minimum number of cumulative units or terms that the system requires before it assigns a student to a corresponding academic level. The system uses only these values if you select Units or Terms on the Level/Load Rules Table page.

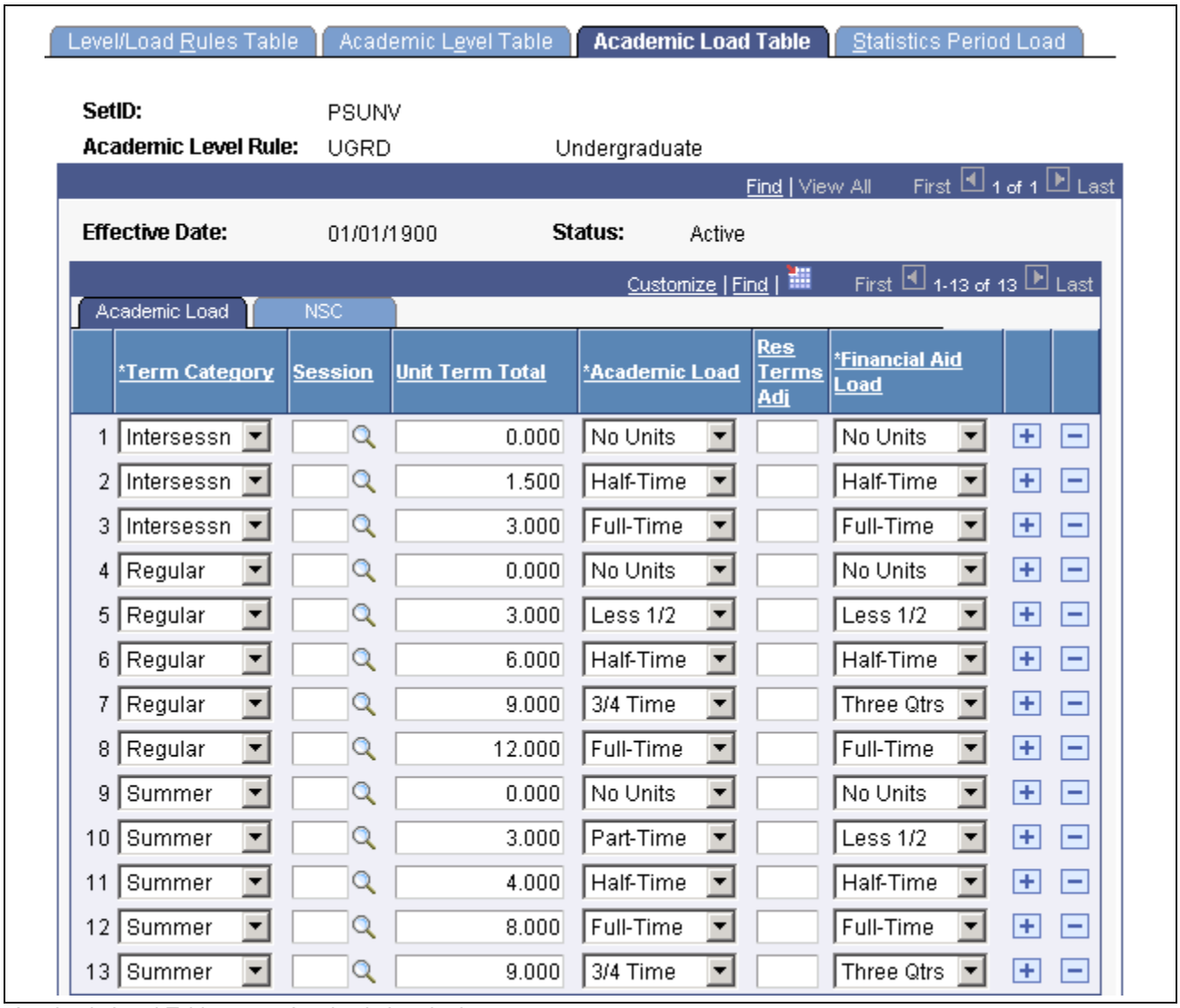
Academic Level
Select an academic level for each increment of cumulative units or terms that you want to associate with this level and load rule. Values for this field are delivered with your system as translate values. You can modify these values.

NSLDS Loan Year (National Student Loan Data System loan year) and **Direct Lending Year**
Select the NSLDS loan year and direct lending year values that correspond to each academic level that you define.

The PeopleSoft Financial Aid application references these values during the FA Term Build (financial aid term year) process.

Defining Load Rules

Access the Academic Load Table page.



Academic Load Table page: Academic Load tab

The Consolidate Academic Statistics process uses these rules to determine a student's academic load when processing an Academic Statistics Period where the academic load rule value = Term Load Rule applies.

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.

Term Category

Select every term category that is valid for the academic load rule. Values for this field are delivered with your system as translate values. You can modify these values.

Note. Map every term category at your institution regardless of your load determiner (units, default, or manual).

Session

Select the session type for the term category if you have more than one session in a term category and the sessions have different academic loads. For example, a summer session term type might have a ten-week session, a twelve-week session, and two six-week sessions. Your institution might not

calculate the academic load for the twelve-week session and the six-week sessions in the same way.

Note. At least one row must be included with a blank session code for each term category. The system uses the row or rows with a blank session code to calculate academic load for the term. The system also calculates the load for the regular session using the row or rows with cleared sessions, which is why the term load and the regular academic session load will always be the same. In addition, a field edit prevents you from entering *1* in the Session field, because the system assumes that the cleared Session field represents the regular academic session. You must have at least one row with a blank session code for each term category in order for the system to calculate academic load based on units.

Unit Term Total — Enter the unit term total for each term category and session type. The unit term total represents the number of units that must be taken to qualify for the academic load level and financial aid level.

Academic Load — Select the academic load value that corresponds to the unit term total. Values for this field are delivered with your system as translate values. You can modify these values.

Res Terms Adj (residence terms adjust) — Enter the residence terms adjust value for each term category and session type to determine what constitutes a full term based on a student's academic load. In the exhibit, a part-time academic load is considered to be worth 50 percent of a full term, a three-quarter time academic load is considered to be worth 75 percent of a full term, and a full-time academic load is considered to be worth 100 percent of a full term. When a student is term activated, the student's approved academic load is used to determine the value of the Terms of Residency field based on the residence terms adjust factor. In this example, a part-time student would have a current in residence terms setting of 0.50 and a full-time student would have a setting of 1.00.

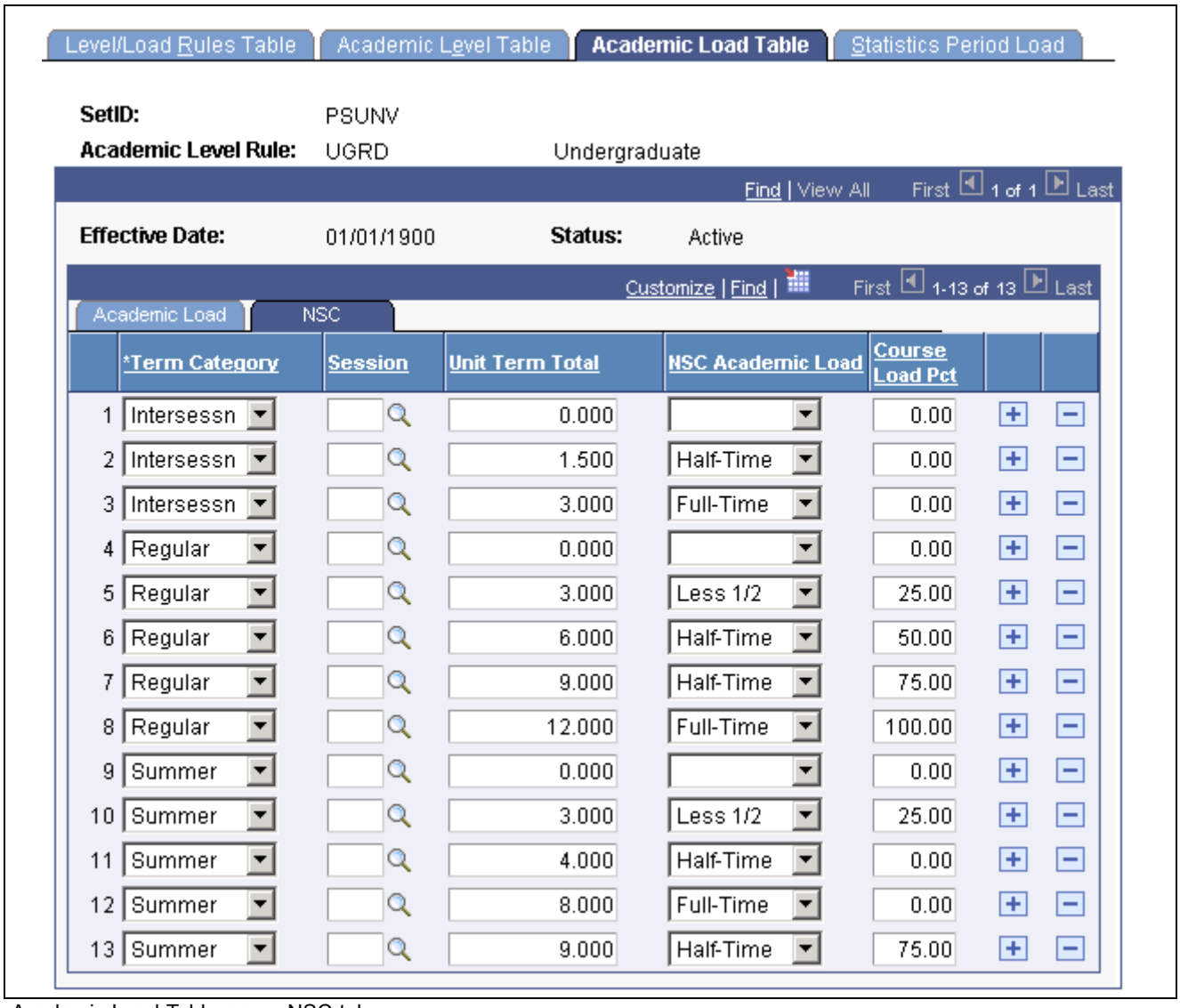
The system obtains the current in residence terms value from the Term Activation - Terms in Residence field.

See *PeopleSoft Enterprise Financial Aid 8.9 PeopleBook*, "Managing Financial Aid Terms".

Financial Aid Load — Select the financial aid load value. The financial aid load represents the financial aid load level equivalent to the academic load value. Values for this field are delivered with your system as translate values. You can modify these values.

NSC Tab

Select the NSC tab.



Academic Load Table page: NSC tab

NSC Academic Load (National Student Clearinghouse academic load)

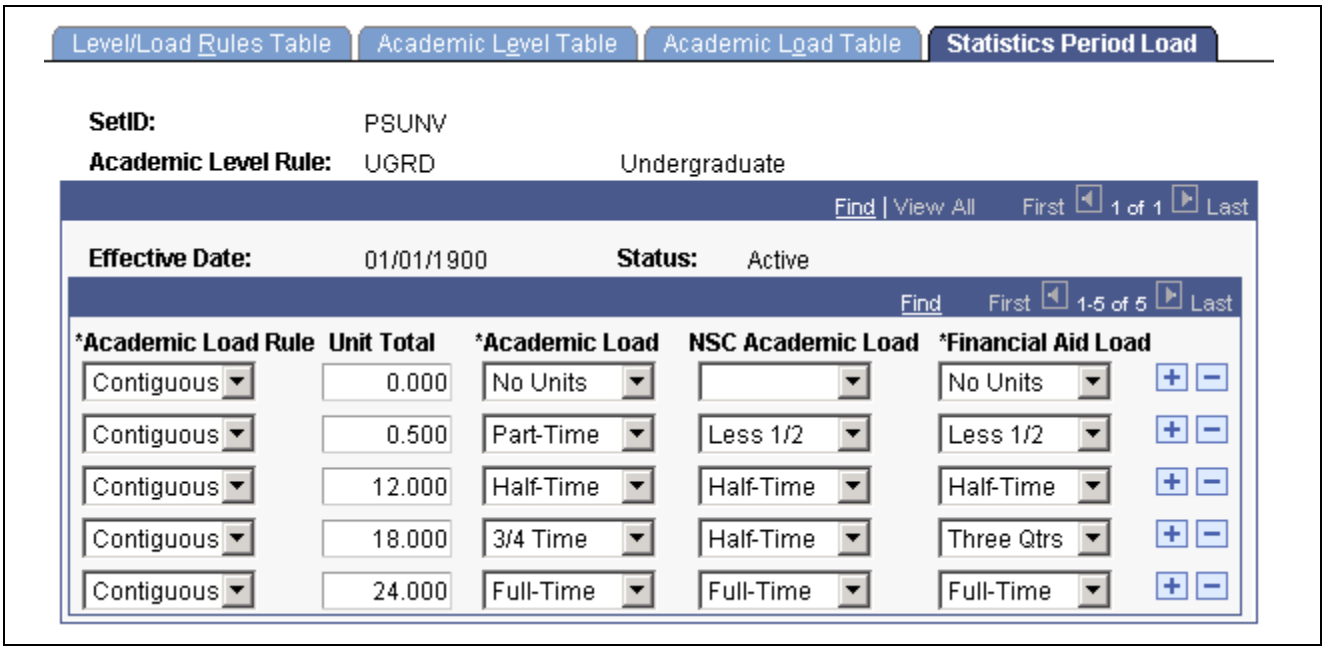
Select the academic load value that your institution reports to the NSC. Values for this field are delivered with your system as translate values. You can modify these values.

Course Load Pct (course load percent)

Enter the course percentage for the NSC academic load. For example, if you have selected *Half-Time* for your NSC academic load, enter *50* (50 percent).

Defining Contiguous Term Load Rules

Access the Statistics Period Load page.



Statistics Period Load page

The Consolidate Academic Statistics process uses the rules on this page to determine a student's academic load when processing an Academic Statistics Period where the academic load rule value = 'Contiguous Terms'.

Note. For the Consolidate Academic Statistics process to effectively combine a student's academic loads for contiguous terms, be sure that you define contiguous term academic load rules for every academic level rule at your institution.

Academic Load Rule — Select *Contiguous* if you plan to use the Consolidated Academic Statistics process to combine a student's academic load unit totals for consecutive terms. If you do not use the Consolidated Academic Statistics process, clear this field and the other fields on this page.

Unit Total — Enter the unit total for each contiguous term academic load rule. The unit term total represents the number of units that a student must take to qualify for the academic loads that you define on any given row of this page.

Academic Load — Select the academic load value that corresponds to the unit total for the row. Values for this field are delivered with your system as translate values. You can modify these values.

NSC Academic Load (National Student Clearinghouse academic load) — Select the NSC academic load value that corresponds to the unit total for the row. The NSC Extract process uses the NSC academic load for NSC reporting purposes. Values for this field are delivered with your system as translate values. You can modify these values.

Financial Aid Load — Select the financial aid load value corresponding to the unit total for the row. The financial aid load is the financial aid equivalent of the academic load for the row. Values for this field are delivered with your system as translate values. You can modify these values.

Defining Academic Organizations

To set up academic organizations, use the Academic Organization Table component (ACADEMIC_ORG_TBL).

This section provides an overview of academic organizations and discusses how to:

- Modify academic organizations.
- Designate financial ownership for academic organizations.
- Designate human resource ownership for academic organizations.

Understanding Academic Organizations

Academic organization structure defines how an academic institution is organized from an administrative perspective. At the lowest level, an academic organization can be compared to an academic department. At the highest level, an academic organization can represent a division.

Before you begin using academic organizations, you must first use PeopleSoft Tree Manager, accessed through PeopleTools, to define the academic organizations themselves, the hierarchy and levels of each academic organization, and the relationship between academic organizations in the hierarchy. One of the primary uses of the tree is to partition an academic institution for security purposes, controlling such areas as a user's access to course catalog data. The number and names of the levels in the academic organization tree can be revised by the institution by using PeopleTools.

Use the Academic Organization component to modify academic organization descriptions and to link each academic organization to one or more financial support or human resources departments on a percentage ownership basis. These relationships are used to report, analyze, and distribute revenue and workload credit.

See Also

Chapter 11, "Securing Your Academic Institution," Securing Academic Organizations, page 212

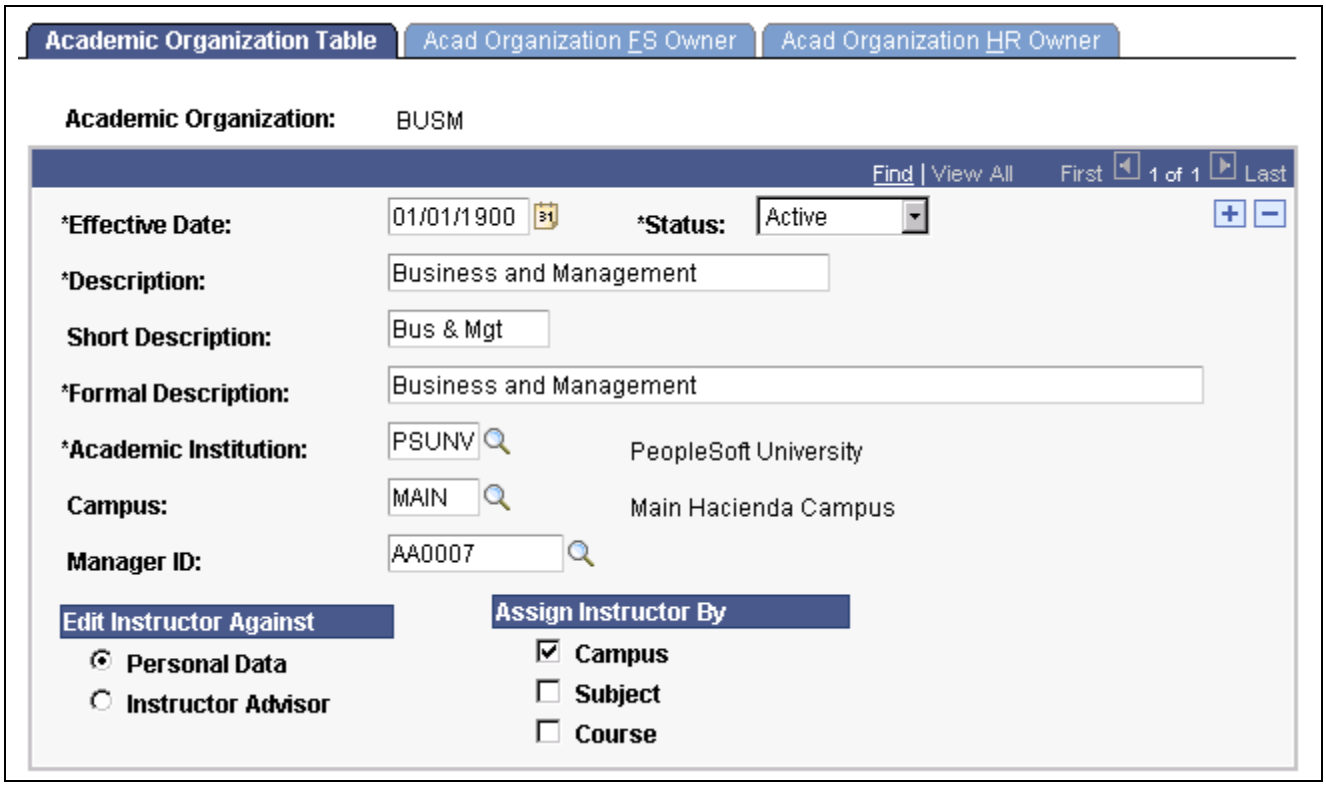
Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Define Academic Organizations

Page Name	Object Name	Navigation	Usage
Academic Organization Table	ACADEMIC_ORG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table	Modify descriptions of academic organizations; link an academic institution, campus, and manager to academic organizations; and define how the institution assigns instructors to classes. The system displays information entered through the academic organization tree in PeopleSoft Tree Manager. You can modify this information.
Acad Organization FS Owner (academic organization financial services owner)	ACAD_ORG_FSOWN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization FS Owner	Designate the financial services department (business unit) responsible for this academic organization. You can use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no impact on security.
Acad Organization HR Owner (academic organization human resources owner)	ACAD_ORG_HROWN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Organization Table, Acad Organization HR Owner	Designate the human resources department responsible for this academic organization. Use these relationships to report, analyze, and distribute revenue and workload credit. Relationships designated here have no impact on security.

Modifying Academic Organizations

Access the Academic Organization Table page.



Academic Organization Table page

Warning! If you are adding new academic organizations directly to this page, the academic institution value on the academic organization record *must* be the same as the academic institution that owns it in the academic organization tree. If these two values are not synchronized, security and reporting are adversely affected. PeopleSoft therefore recommends that you add new academic organizations through PeopleSoft Tree Manager.

The system populates the Effective Date, Status, Description, Short Description, Formal Description, Academic Institution and Campus fields from the academic organization tree in PeopleSoft Tree Manager.

Academic Institution Select the academic institution to which this academic organization belongs. This academic institution value must be the same as the academic institution on the academic organization tree. If these two values are not synchronized, security and reporting are adversely affected.

Campus Select the campus to which this academic organization belongs.

Manager ID Select the manager for the academic organization, such as the department chair. This value is informational only and is currently not used in any internal system processes.

Edit Instructor Against

In this group box, select the view that the system should use when users search for an instructor to assign to classes while scheduling classes. Options are:

Personal Data All people with a PERSONAL_DATA record in the PeopleSoft system.

Instructor Advisor People defined as instructors and advisors in the Instructor/Advisor Table component. The Instructor/Advisor component enables you to link instructors

to courses for which they are approved and available to teach for specified periods of time. When you are scheduling classes and selecting an instructor, the system displays only these instructors, thus simplifying the assignment of instructors to classes.

Assign Instructor By

If you select the Instructor Advisor option in the Edit Instructor Against group box, the Assign Instructor By group box becomes available. Select how the institution wants to assign instructors for this academic organization. You can select one, none, or any combination of these three options: *Campus, Subject,* and *Course*. If you select none of these options, the instructor advisor edit applies to all courses within this academic organization.

Remember that for whichever options you select, you must define these same options for each instructor on the Approved Courses page of the Instructor/Advisor Table component. Only then does the instructor's name appear as a choice for the Instructor ID field on the Meetings page or Exam page when you schedule classes. For example, if you select the Subject and Campus options, you must enter values for both the Subject and Campus fields on the Approved Courses page to make the instructor approved and available for instruction.

Warning! Changing the saved selection for the Edit Instructor Against or Assign Instructor By group boxes removes an instructor's course rows on the Approved Courses page for the academic organization. The system, however, does maintain the rows for other academic organizations.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors

Designating Financial Ownership for Academic Organizations

Access the Acad Organization FS Owner page.

Business Unit Select the business unit considered to be the financial support unit of this academic organization.

Department Select the department in which the business unit is housed. Enter department values on the Department Table page.

Percent Owned Enter the percentage of the academic organization for which the business unit is responsible. You can have multiple business units with split ownership of the academic organization, but the total percent owned between all business units must equal 100.

Designating Human Resource Ownership for Academic Organizations

Access the Acad Organization HR Owner page.

Department Select the department responsible for human resources support for this academic organization. Enter department values on the Department Table page.

Percent Owned Enter the percentage of the academic organization for which the human resources department is responsible. You can have multiple human resources

departments with split ownership of the academic organization, but the total percent owned between all departments must equal 100.

Defining Academic Groups

To set up academic groups, use the Academic Group Table component (ACADEMIC_GROUP_TBL).

This section provides an overview of academic groups and discusses how to:

- Describe academic groups.
- Link academic career catalog numbers to academic groups.
- Define standard class meeting patterns.

Understanding Academic Groups

Academic groups are the highest level breakdowns of the academic institution for academic structural purposes. Often each school or college within an academic institution is defined as an academic group. Sometimes units such as extended education are defined as an academic group if classes are offered separately from the standard colleges or schools. For example, PeopleSoft University comprises the College of Liberal Arts, the College of Engineering, the School of Law, the School of Education, and the Evening Extension Division. Each entity is defined as an academic group in the system. Academic groups can offer academic programs in more than one academic career, and academic careers can cross academic groups. In the previous example, the College of Liberal Arts and the College of Engineering contain both undergraduate and graduate academic careers, but the School of Law contains only one academic career, which is not shared with any other academic group.

To link an academic group to an academic institution and an academic organization, add the academic group through the Academic Group Table component *and* add the academic group as a child node to academic institutions and academic organizations in PeopleSoft Tree Manager—one aspect does not update the other aspect. In PeopleSoft Tree Manager, every node is defined by its relation to other nodes. In most cases, academic groups are defined as the next level of academic organization structure below academic institution. However, academic groups can occur at any level within the academic organization structure. It is not essential for academic groups to follow the same hierarchical structure as academic organizations. Although this is the case for most institutions, some might want to use academic groups and academic organizations to represent different dimensions of a matrix organization. In such a case, academic groups would not be child nodes in the academic organization tree but rather set apart as nodes at the same level as academic organizations.

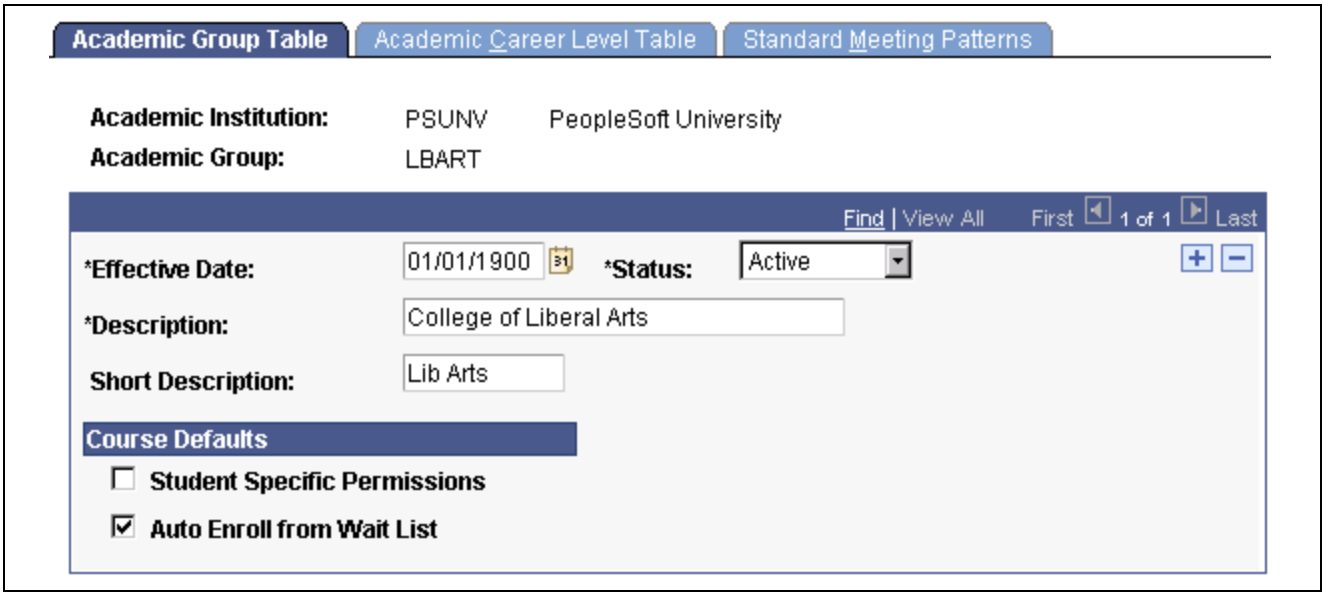
Use the Academic Group Table component to define academic groups and link academic careers and standard class meeting patterns to them.

Pages Used to Define Academic Groups

Page Name	Object Name	Navigation	Usage
Academic Group Table	ACADEMIC_GROUP_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table	Describe academic groups.
Academic Career Level Table	CATLG_CAREER_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Academic Career Level Table	Link academic careers and ranges of catalog numbers to academic groups. These values serve as a data entry and tracking aid as you create the course catalog. When you enter a catalog number on the Offerings page of the Course Catalog component, the system displays the correct academic career value.
Standard Meeting Patterns	STND_MTG_PAT_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Group Table, Standard Meeting Patterns	Define standard class meeting patterns for an academic group. All typical patterns must be defined here, including the to-be-announced class meeting pattern. These patterns are a data entry aid when scheduling classes.

Describing Academic Groups

Access the Academic Group Table page.



Academic Group Table page

Course Defaults

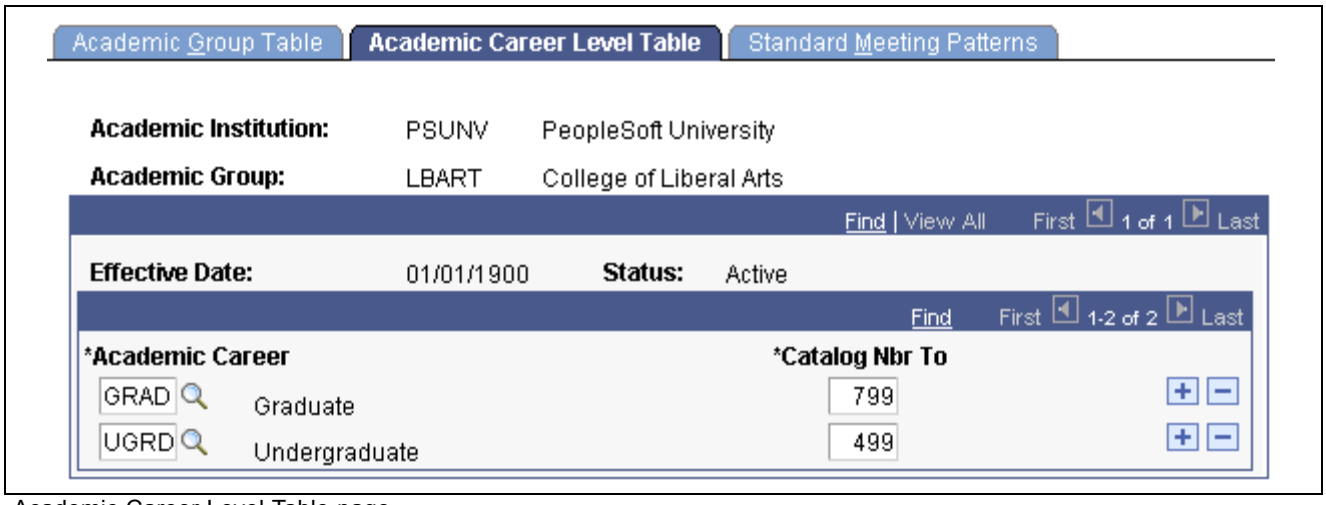
Use the Course Defaults group box to set default values for the course catalog and schedule of classes pages. The fields in this group box are to ease data entry. You can override these default values for individual courses and classes.

Student Specific Permissions Select to have all classes scheduled within this academic institution and academic group require that you generate permissions for students to enroll in classes. The check box value migrates to the Class Schedule Entry page, where it can be overridden. Student-specific permissions require that you generate permissions for individual students.

Auto Enroll from Wait List Select to have all classes scheduled within this academic institution and academic group automatically enroll students from waiting lists into classes whenever spaces are available and the wait list process is run. The check box value migrates to the Enrollment Control page of the schedule of classes components, where it can be overridden.

Linking Academic Career Catalog Numbers to Academic Groups

Access the Academic Career Level Table page.



Academic Career Level Table page

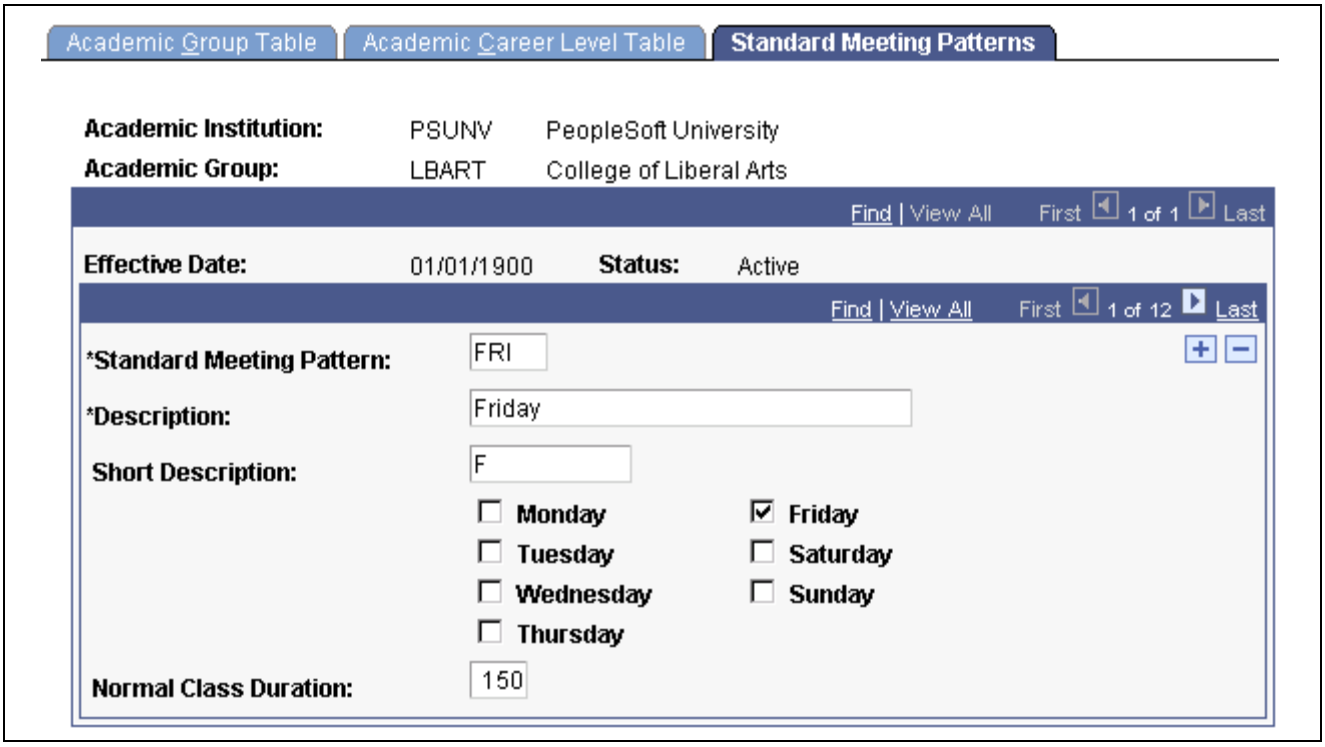
Academic Career Select the academic career that you want to link to this academic group. Insert additional rows to enter all academic careers that you want to link to this academic group.

Catalog Nbr To (catalog number to) For each academic career that you link to this academic group, enter the course number immediately *after* the highest possible course catalog number for that academic career. For example, if the highest possible course catalog number within the College of Liberal Arts for the undergraduate academic career is 299, enter *300* in the field. Likewise, if the highest catalog number for the graduate academic career is 599, enter *600* into the field. The number that you enter defines the lowest possible catalog number for the subsequent academic career within this academic group. In this example, 300 would be the first catalog number of the graduate academic career within the College of Liberal Arts.

When you create a new course offering on the Offerings page of the Course Catalog component, the system displays the academic career value based on the academic career and catalog number combinations from this page. In the preceding example, if you create a course within the College of Liberal Arts with a catalog number of 300, the system displays the academic career *Graduate.* If the catalog number is 299, the system displays the academic career *Undergraduate.*

Defining Standard Class Meeting Patterns

Access the Standard Meeting Patterns page.



Standard Meeting Patterns page

Standard Meeting Pattern Enter a code to represent the standard class meeting pattern for this academic group. Insert additional rows to add more standard meeting patterns for this academic group.

Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and **Sunday** Select the appropriate days of the week for this standard meeting pattern.

Normal Class Duration Enter the number of minutes for each class in this standard meeting pattern.

Establishing Fields of Study

To set up fields of study, use the Field of Study Table component (STUDY_FIELD_TABLE).

This section lists the page used to establish fields of study.

Page Used to Establish Fields of Study

Page Name	Object Name	Navigation	Usage
Field of Study Table	STUDY_FIELD_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, Field of Study Table	Define fields of study. Link fields of study to academic subjects on the Subject Taxonomy page and to academic plans on the Academic Plan Taxonomy page.

Modifying CIP and HEGIS Codes

To set up CIP and HEGIS codes, use the CIP Code Table component (CIP_CODE_TABLE) and the HEGIS Code Table component (HEGIS_CODE_TABLE). Use the SSR_CIP_CODE_TABLE and SSR_HEGIS_CODE_TABLE component interfaces to load the data into the tables for these component interfaces.

CIP and HEGIS codes are delivered with the system. You can modify descriptions of the codes and add new codes through the CIP Code Table page and the HEGIS Code Table page. This section discusses how to modify CIP and HEGIS codes.

Pages Used to Modify CIP and HEGIS Codes

Page Name	Object Name	Navigation	Usage
CIP Code Table	CIP_CODE_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, CIP Code Table	Modify descriptions of the CIP codes shipped with Campus Solutions.
HEGIS Code Table	HEGIS_CODE_TABLE	Set Up SACR, Foundation Tables, Reporting Codes, HEGIS Code Table	Modify descriptions of the HEGIS codes shipped with Campus Solutions.

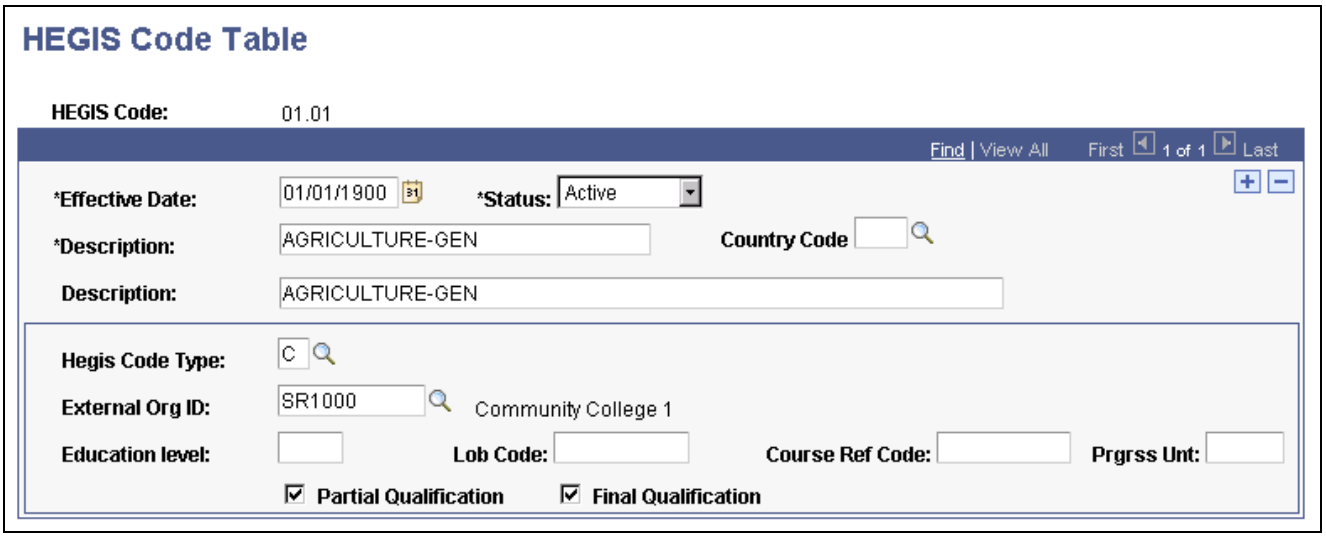
Modifying CIP Codes

Access the CIP Code Table page.

Alternative CIP Code (alternative classification of instructional programs code) Some states derive their own coding schemes from the CIP code. If applicable, enter the alternative CIP code of the state.

Modifying HEGIS Codes

Access the HEGIS Code Table page.



HEGIS Code Table page

(NLD) HEGIS Code Information

Hegis Code Type Enter a code type. There are two types of code; one for a training program, one for a training course.

External Org ID (external organization ID) Enter an ID, which is used for MBO codes.

Education level Enter the level of education for which the code is offered.

Lob Code Enter the internal code of a national institution for the (sub)qualification.

Course Ref Code Enter the course to which the code is linked.

Partial Qualification Select this check box whenever the code is being used for a subqualification or a course.

Final Qualification Select this check box whenever the code is being used for a qualification or a training program.

Defining Subject Areas

To set up subject areas, use the Academic Subject Table component (SUBJECT_TABLE).

This section provides an overview of subject areas and discusses how to:

- Describe subject areas.
- Define subject area taxonomy.
- Define subject and component multipliers.

Understanding Subject Areas

Subject areas are the specific areas of instruction in which courses are offered within academic organizations. For example, when a course is identified as Math 101, math is the subject area. Subject areas are tied to the academic organization tree by the academic organization data for each subject area and by detail nodes for academic organizations in PeopleSoft Tree Manager. Subject areas are also tied to courses, which you link to later when developing the course catalogs.

Before using subject areas, use PeopleSoft Tree Manager, accessed through PeopleTools, to define the academic organizations and to create a hierarchical representation of subject areas by linking subject areas as detail nodes to the academic organizations. One of the primary uses of defining subject areas as detail nodes on the academic organization tree is to limit access to academic subjects.

See Also

Chapter 11, "Securing Your Academic Institution," page 191

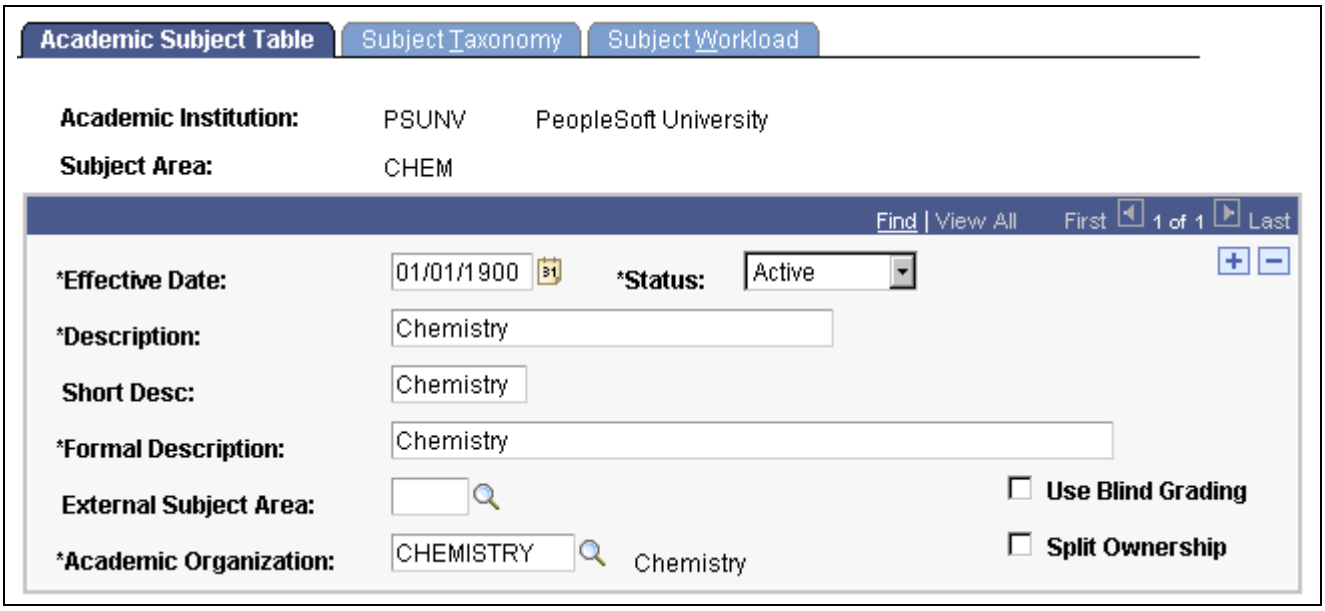
Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Define Subject Areas

Page Name	Object Name	Navigation	Usage
Academic Subject Table	SUBJECT_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table	Describe subject areas, modify existing subject area descriptions, link subject areas to academic organizations, and set other parameters, such as blind grading.
Subject Taxonomy	SUBJECT_TAXONOMY	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Taxonomy	Define subject area taxonomy by linking subject areas to CIP and HEGIS codes and to fields of study.
Subject Workload	SUBJ_WORKLD_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Subject Table, Subject Workload	Define subject and component multipliers by the weight of each component within each subject area at the academic institution.

Describing Subject Areas

Access the Academic Subject Table page.



Academic Subject Table page

External Subject Area Currently not in use.

Academic Organization Select the academic organization that offers courses in this subject area. Any academic organization entered here should also have a detail node associated with it for this subject area on the academic organization tree.

Use Blind Grading Select to indicate that blind grading be used for every course within this subject area. This serves as the default value and can be changed on a course-by-course basis on the Offerings page of the Course Catalog component. Blind grading enables you to create a grade roster with randomly generated numbers rather than student IDs.

Split Ownership Select to designate multiple academic organization owners for this subject area. If you select this check box, the Academic Organization field and the Percent Owned field become available for edit.

Defining Subject Area Taxonomy

Access the Subject Taxonomy page.

CIP Code Select the CIP code for this subject area. CIP code values are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.

HEGIS Code Select the HEGIS code for this subject area. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

Field of Study Select a field of study for this subject area.

Defining Subject and Component Multipliers

Access the Subject Workload page.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Instructor Workload"

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Tracking Instructor Workload"

(NLD) Defining Dutch Academic Structure

To set up Dutch academic structure, use these components: Cluster Code Table NLD (SSR_CLUST_CD_NLD), GBA Country Code Table (SSR_COUNTRY_NLD), MBO Code Table NLD (SSR_MBO_CD_NLD), BRINcode Table NLD (SCC_BRINCODE_NLD), GBA Nationality Code Table (SSR_NATIONAL_NLD), and Prior Education Table NLD (SSR_PRE_EDU_NLD).

This section discusses how to define values that set up academic structures in the Netherlands.

Pages Used to Define Dutch Academic Structure

Page Name	Object Name	Navigation	Usage
Cluster Codes Table	SSR_CLUSTER_CD_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, Cluster Code Table NLD	Define cluster codes, which can be registered for Prior Education table entries. These codes provide a higher level of aggregation that combines multiple forms of education into one educational cluster. During the admissions process, entering a cluster detail code for a specific student prior to education entry can refine this aggregation.
GBA Country	SSR_COUNTRY_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, GBA Country Code Table	Register GBA country codes, which are supplied by the Dutch Ministry of Internal Affairs. These codes are linked to the Country Code table.
MBO Code Table	SSR_MBO_CD_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, MBO Code Table NLD	Define MBO codes, which are used to register for specific forms of education on the Dutch Education table.

Page Name	Object Name	Navigation	Usage
BRINcode Table	SCC_BRINCODE_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, BRINcode Table NLD	Register BRINcodes, which are defined by the Dutch Ministry of Higher Education and are used in CBAP. Use BRINcodes to communicate with the Ministry. You can register BRINcodes in combination with Academic Programs, Campuses, and Academic Organizations.
GBA Nationality	SSR_NATIONAL_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, GBA Nationality Code Table	Register GBA nationality codes, which are supplied by the Dutch Ministry of Internal Affairs. Registration of a student's nationality is mandatory in the Netherlands. This official country code is necessary for use with CBAP functionality and BRON.
Prior Education Table	SSR_PRE_EDU_NLD	Set Up SACR, Foundation Tables, Academic Structure Netherlands, Prior Education Table NLD	Define prior education codes, which are used to note a specific level of education attained by students. This information is relevant for the current admission to a specific academic program.

CHAPTER 6

Establishing Terms and Sessions

Terms, sessions, and academic calendars are time elements. As you define these elements, consider how they affect the business processes. For instance, they can affect class enrollment, financial aid, billing, tuition refunds, and statistical reporting.

This chapter discusses how to:

- Define term values.
- Set up time periods.
- Define enrollment action reasons.
- Define terms, sessions, and session time periods.

See Also

Chapter 7, "Defining Traditional Academic Calendars," page 129

Chapter 8, "Defining Dynamic Academic Calendars," page 139

Defining Term Values

To set up term values, use the Term Values Table component (TERM_VALUES_TABLE).

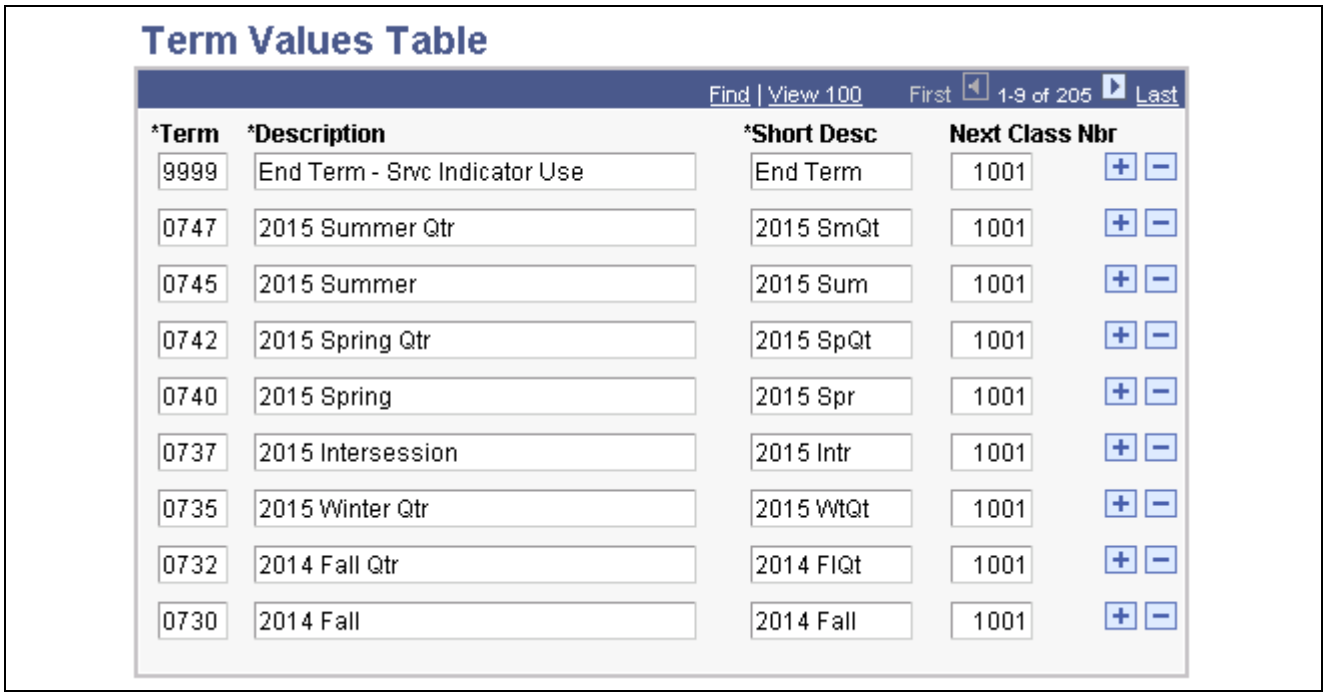
This section discusses how to set up term values.

Page Used to Define Term Values

Page Name	Object Name	Navigation	Usage
Term Values Table	TERM_VALUES_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term Values Table	Set up term values and their descriptions. You use these term values for all academic institutions and careers throughout Campus Solutions, regardless of the structure of the terms that you define.

Setting Up Term Values

Access the Term Values Table page.



Term Values Table page

Term Enter the numeric code to uniquely identify the term. You must define terms in sequential order so that you can correctly sort, report, and analyze term data. For example, the system accumulates statistics and evaluates degree progress by the sequence of terms. In addition, PeopleSoft recommends that you assign term values in increments of two or three so that you can insert additional terms, such as intersession or summer terms, at a later time.

Next Class Nbr (next class number) Enter the class number from which you want the class scheduling processes to begin assigning class numbers. When you schedule a new class through either the manual or term roll process, the process references this field for the term in which you are creating the class and assigns the class the *next* number.

For example, if you have set this field to *1000* for term 420, when you schedule a new class for term 420, the class scheduling process assigns the class the number 1001 and updates the field value on this page to *1001*. The next new class that you schedule for term 420 is number 1002, and so on. Use large number increments between subsequent terms to avoid having students mistakenly use a class number from the previous term to enroll in a class for the current term.

Setting Up Time Periods

To set up time periods, use the Time Period Table component (TIME_PERIOD_TABLE).

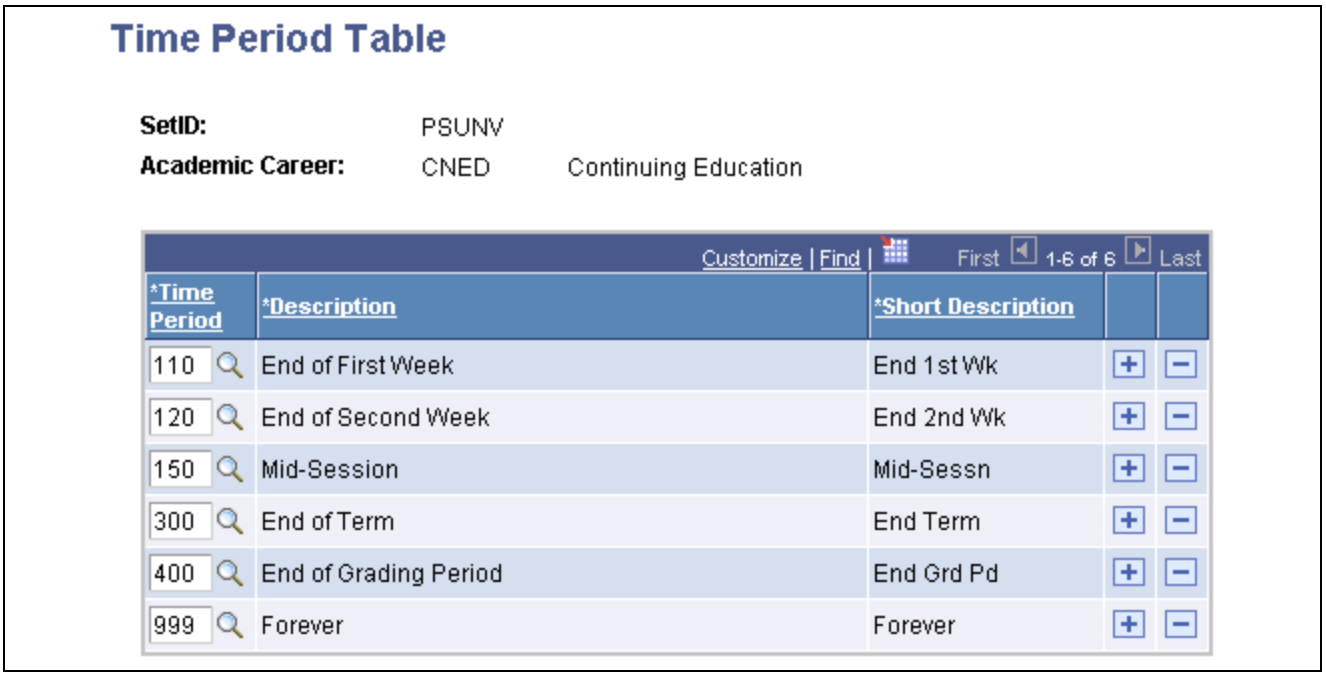
This section discusses how to define time periods.

Page Used to Set Up Time Periods

Page Name	Object Name	Navigation	Usage
Time Period Table	TIME_PERIOD_TABLE	Set Up SACR, Product Related, Student Records, Enrollment, Time Period Table	Define the time periods, or critical points in time, that are valid for each academic career within a setID.

Defining Time Periods

Access the Time Period Table page.



Time Period Table page

Time periods identify landmark session dates (on the Session Time Period Table page), secure access to various enrollment functions by enrollment access ID (on the Enrollment Functions page), and define how enrollment action reasons relate to the dropping of classes (on the Enrollment Action Reason Table page).

Time Period Select a time period that is valid for the academic career and setID. You can add more time period translate values, provided that you attach your own coding to them.

Description This field is populated by the translate table when you select a time period.

Short Description This field is populated by the translate table when you select a time period.

See Also

Chapter 14, “Securing Student Records,” page 233

Defining Enrollment Action Reasons

To set up enrollment action reasons, use the Enrollment Action Reason component (ENRL_RSN_TBL).

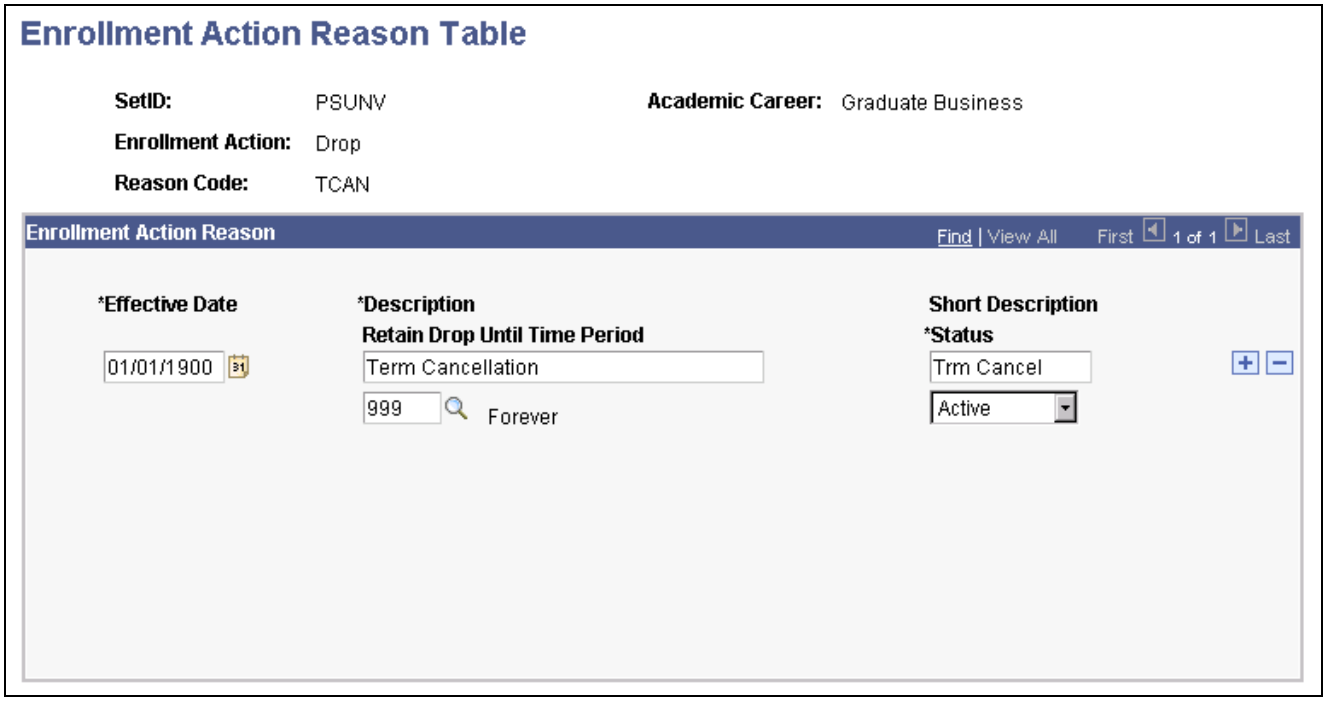
This section discusses how to define enrollment action reasons.

Page Used to Define Enrollment Action Reasons

Page Name	Object Name	Navigation	Usage
Enrollment Action Reason Table	ENRL_RSN_TBL	Set Up SACR, Product Related, Student Records, Enrollment, Enrollment Action Reason	Define enrollment action reasons to provide relevant information about class enrollment transactions.

Defining Enrollment Action Reasons

Access the Enrollment Action Reason Table page.



Enrollment Action Reason Table page

Enrollment action reasons are linked to enrollment actions such as *Add Grade, Drop,* and *Enroll.* Enrollment actions are delivered with the system as translate values. You can add enrollment actions to the translate table.

Retain Drop Until Time Period

If the institution needs to retain student enrollment records during part of the drop delete period, you can associate time periods with enrollment action reasons that you define for enrollment drop actions. When you create an enrollment request with an enrollment drop action, you can then select an enrollment action reason that has a time period associated with it. For requests during the drop delete period but before the end of the time period, the enrollment engine retains the affected student enrollment records. For requests

during the drop delete period but after the time period, the enrollment engine deletes the affected student enrollment records.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Using Enrollment Related Processes"

Defining Terms, Sessions, and Session Time Periods

To set up terms, sessions, and session time periods, use the Term/Session Table component (TERM_TABLE).

Campus Solutions enables you to link defined terms to every academic career at an academic institution. This enables you to structure different terms and sessions, depending on the academic career, to suit the needs of the institution.

This section discusses how to:

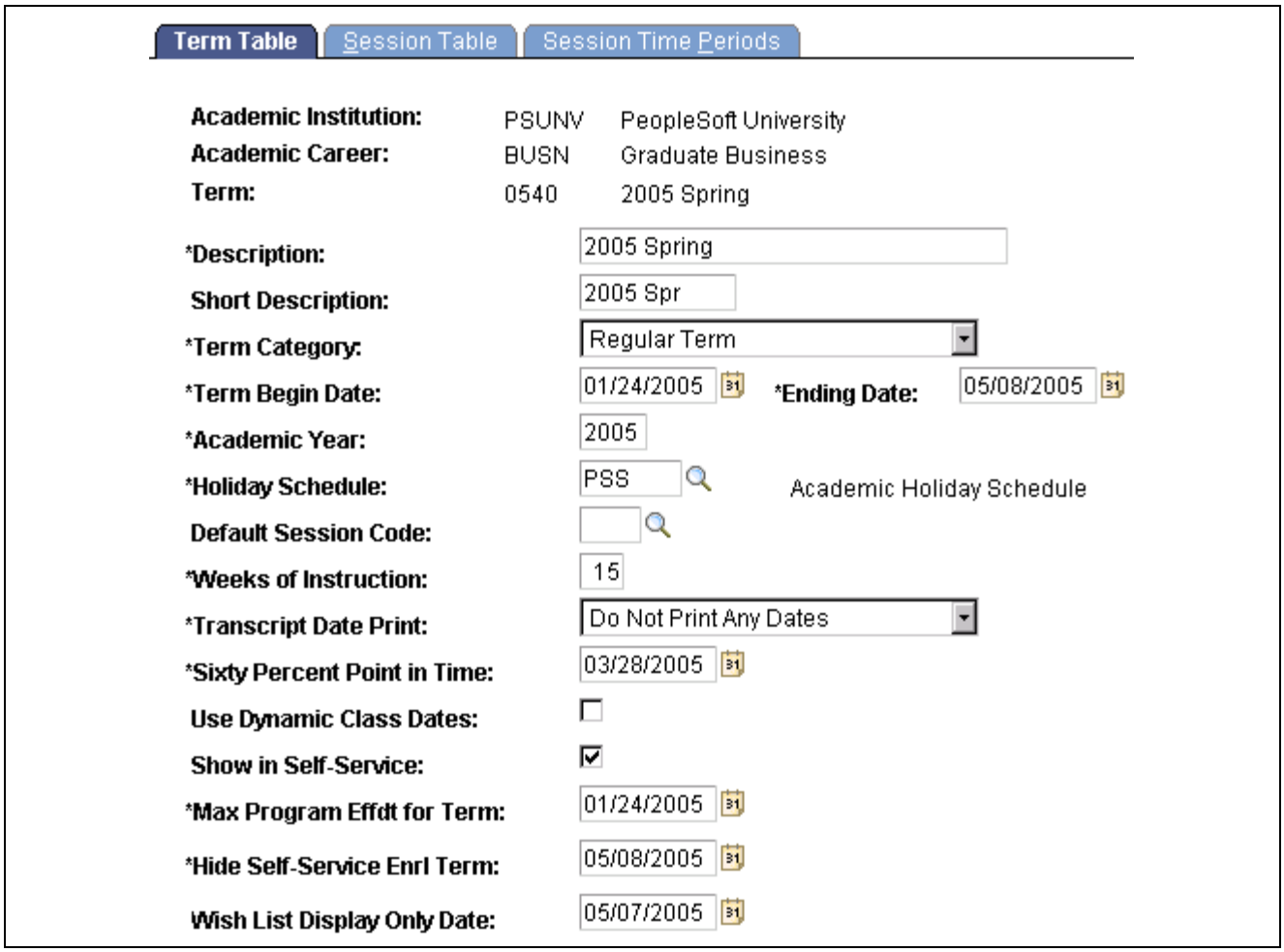
- Define terms.
- Define sessions.
- Define session time periods.

Pages Used to Define Terms, Sessions, and Session Time Periods

Page Name	Object Name	Navigation	Usage
Term Table	TERM_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Term Table	Define terms within academic careers. Different academic careers at an institution can have different term structures.
Session Table	SESSION_TABLE	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Table	Define the sessions of a term, including the significant dates within the session. Sessions subdivide a term into multiple time periods in which to offer classes.
Session Time Periods	SESS_TIME_PERIODS	Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Session Time Periods	Define landmark time periods within each session of a term. The system uses time periods for enrollment security purposes.

Defining Terms

Access the Term Table page.



Term Table page

A term is an administrative time period within which sessions are defined, students are billed, and statistics are accumulated for individual students and the entire academic institution.

Term Category Select the category that best describes the term. You can modify these translate values.

Term Begin Date and **Ending Date** Enter the first and last official dates of the term. The system uses the term begin date as the effective date of the term. The term begin and end dates are important because they determine, for example, the courses that are available for the term, the status of a student's academic program and academic plan, and so on. These dates are referenced throughout the system.

Academic Year Enter the academic year to which the term belongs. For example, *2004* indicates that the term belongs to the 2004−2005 academic year. You must associate each term with an academic year for reporting and financial aid accumulation purposes. However, you can change the financial aid academic year for individual students.

Holiday Schedule Select the holiday schedule for the term. Define holiday schedule values on the Holiday Schedule Table page in HRMS.

Default Session Code Select the default session code. This value is used throughout the system to supply the session code associated with the term, although the value can be overridden. The default serves as a data entry aid.

Weeks of Instruction Enter the standard number of weeks of instruction for classes offered in the term. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.

Transcript Date Print Select the dates to print on student transcripts for this academic career and term combination. The value of this field appears by default, based on the corresponding field value from the SA Options (student administration options) page of the Installation Table component. Any modification to these translate values requires a substantial programming effort. Values are:

Do Not Print Any Dates: No dates are printed on student transcripts.

Print Class Dates: To print class dates on student transcripts for the specified transcript type, select this option and the Print Class Dates check box on the Enrollment/Statistics page of the Transcript Type component.

Print Session Dates: Select to print session dates on student transcripts.

Print Term Dates: Select to print term dates on student transcripts.

Sixty Percent Point in Time Enter the date on which the term is 60 percent complete. The system uses this date when computing refunds for students. In the U.S., most academic institutions stop issuing refunds at this point.

Use Dynamic Class Dates Select to enable the Dynamic Class Dates feature for all sessions scheduled in this term. The system migrates the value of this check box to the corresponding field on the Session Table page, where you can override the selection for a specific session. The system, by default, selects this check box.

Show in Self-Service Select to enable users to add or modify enrollment transactions for the term through self-service enrollment. The system, by default, selects this check box.

Max Program Effdt for Term (maximum program effective date for term) Enter the date to be used as the deadline for term activation in a given term. The date appears by default from the Academic Career Table page. The deadline can be modified on the Term Table, but must be equal to or after the term start and before the Term end date.

Hide Self-Service Enrl Term (hide self-service enrollment term) Enter the date after which the term is no longer available for selection as a Select Term within self-service enrollment wish list, add classes, drop classes, swap a class, and edit.

Wish List Display Only Date Enter the date after which the wish list is no longer available for update and becomes display only. If you enter a date here, it must be before the Hide Self-Service Enrl Term date.

See Also

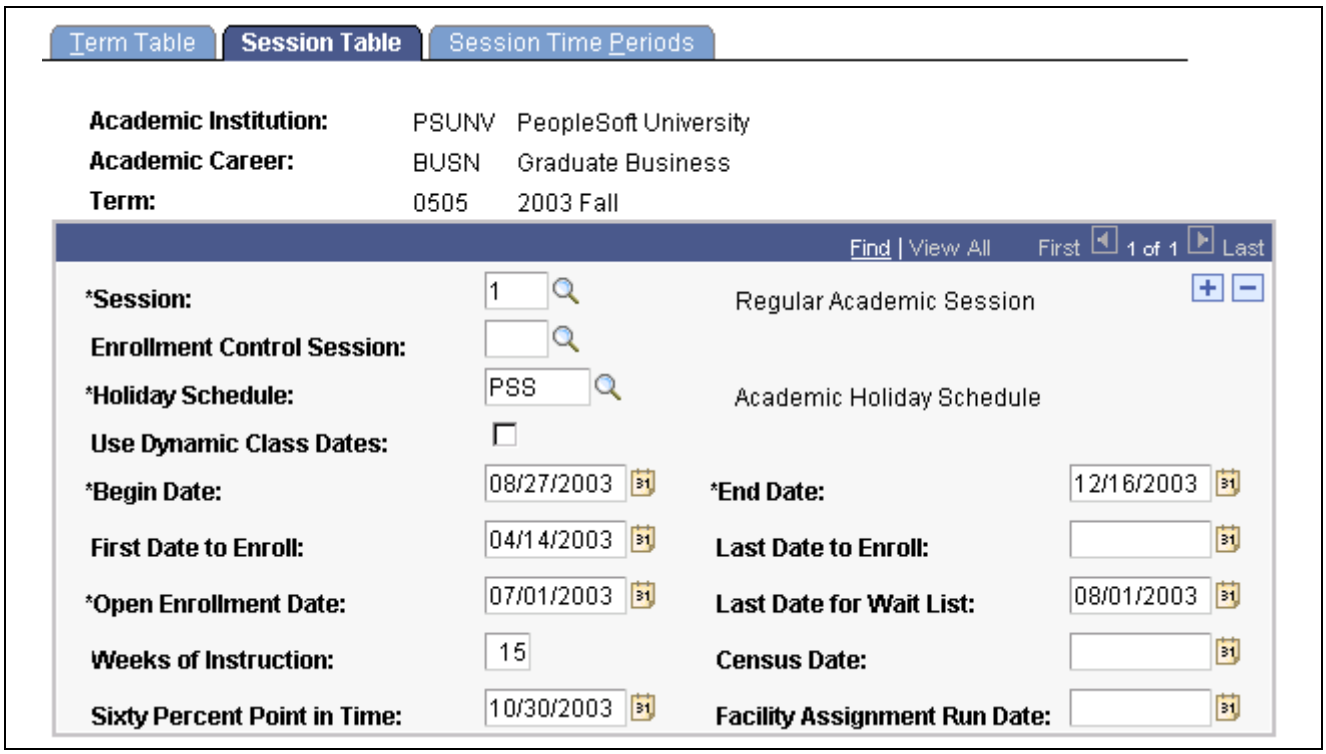
Chapter 8, “Defining Dynamic Academic Calendars,” page 139

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, “Refunding Customers”

PeopleSoft Enterprise Human Resources Management System documentation

Defining Sessions

Access the Session Table page.



Session Table page

Important! After the academic institution's open enrollment period begins, the system holds the student to the enrollment limits for the session rather than enrollment limits for the appointment. The enrollment limit for a session is defined on the Academic Program Table page; the appointment limit is defined on the Appointment Limits Table page in the Term/Session Table component.

Session

Select the type of session that you are defining for the term. To schedule open entry/exit (OEE) class sections for a course within the specified academic institution, academic career, and term combination, you must define one OEE session per combination. The system restricts the scheduling of classes within an OEE session to only the courses available in OEE format, as defined on the Offerings page of the Course Catalog component.

When you define an OEE session, the system automatically selects the Use Dynamic Class Dates check box and makes it unavailable, because the calculation of dynamic class data for an OEE class section requires the use of the Dynamic Class Dates feature. The system also makes several date fields unavailable because the dates do not apply to OEE class sections.

You can modify these translate values and their descriptions, with the exception of *OEE,* for which you can modify the descriptions only. Any modification to this code requires a substantial programming effort.

Enrollment Control Session

Select an enrollment control session to limit to a single session's enrollment limit the number of units that a student can take for all sessions within a term.

For example, suppose that the following three sessions and corresponding enrollment unit limits exist for the fall term: a regular session with an 18-unit limit, a 12-week session with a 6-unit limit, and a 6-week session with a 3-unit limit. To limit the total number of units that a student can take in all three sessions to 18 units, make the regular session the enrollment control session. This limits the student to a maximum of 18 units in the fall term—regardless of the session in which the student registers for courses. The system still enforces enrollment limits for individual sessions. In this example, a student can take a maximum of only 6 units for the 12-week session and 3 units for the 6-week session. However, if a student takes the maximum units for the 12-week and 6-week sessions, the system limits the student to 9 units in the regular session because the student cannot exceed 18 units for all three sessions.

Holiday Schedule Select the holiday schedule for the session. Define holiday schedule values on the Holiday Schedule Table page in HRMS.

Use Dynamic Class Dates Select to enable the Dynamic Class Dates feature for all classes scheduled within the session.

Begin Date and **End Date** Enter the default begin and end date for classes offered in the session. When you define class sections, the system migrates the session begin and end dates to the class start and end dates on the Basic Data page of the Schedule New Course component. You can override these dates for the class section.

Warning! The system does not validate against term begin and end dates.

First Date to Enroll and **Last Date to Enroll** Enter the first and last dates on which students can enroll in classes for the specified session. The enrollment engine prevents students from enrolling in classes before the date that you specify. This field is required for OEE sessions but optional for all other sessions. The first date to enroll must be on or before the start date of the first enrollment appointment within the session. The last date to enroll must be on or after the end date of the last enrollment appointment within the session.

Open Enrollment Date Enter the date on which students can perform enrollment functions in the session, term, and academic career combination without having an enrollment appointment. The open enrollment date is tied to the academic career of the course as defined in the Course Catalog component. For example, if the academic career, term, and session combination is graduate, fall, and regular, then the open enrollment date affects the courses defined under the graduate career in the course catalog for this session.

Last Date for Wait List Enter the final date on which a student can be placed on a wait list for the session. The enrollment engine assigns a student to the wait list for a class if the class is full and the user selects the Wait List Okay check box for the enrollment request.

Weeks of Instruction Enter the standard number of weeks of instruction for classes offered in the session. The Instructor Workload feature in Student Records uses this value when calculating faculty workload. Financial Aid uses this value when building terms and projections.

Census Date Enter the cutoff date for census statistics for the session. This field is for informational purposes only.

Sixty Percent Point in Time Enter the date on which you consider the session to be 60 percent complete. The system uses this date when computing refunds. In the U.S., most academic institutions stop issuing refunds at this point.

Facility Assignment Run Date Enter the run date of the facility assignment if you are using the Universal Algorithm Schedule25 and Resource25 software to assign facilities to classes. This assists you in assigning facilities during class scheduling.

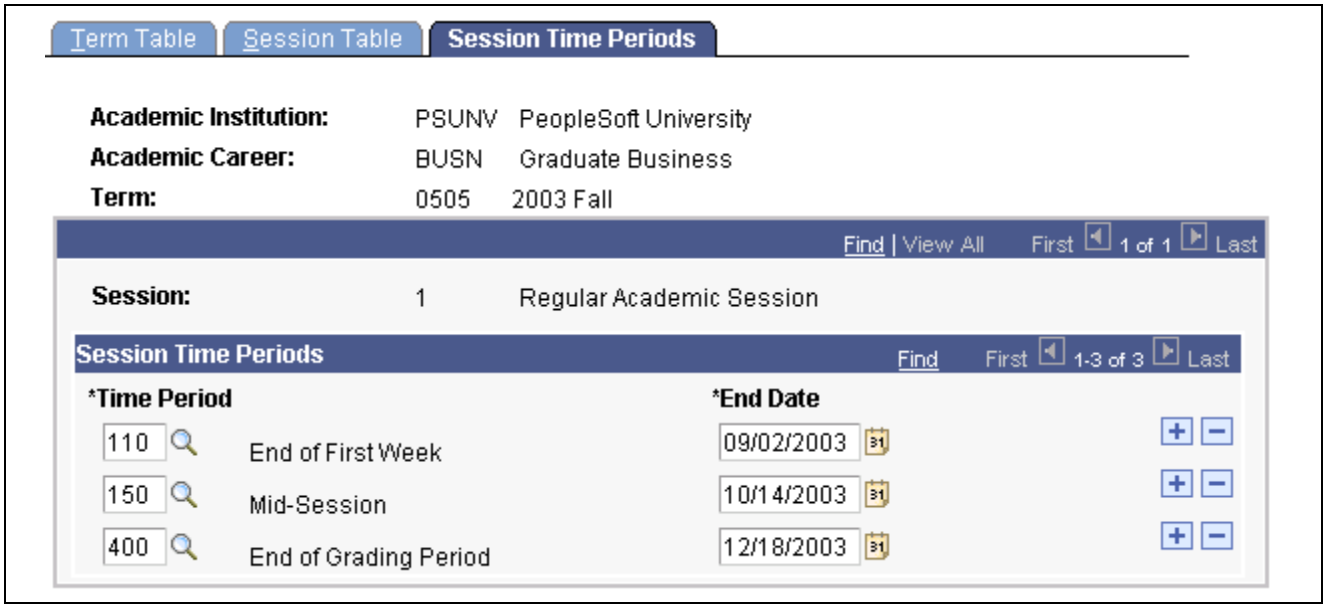
See Also

Chapter 8, "Defining Dynamic Academic Calendars," page 139

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Refunding Customers"

Defining Session Time Periods

Access the Session Time Periods page.



Session Time Periods page

Important! If you do not enter any time periods on this page, and the enrollment functions security points to specific time periods, the system denies access to enrollment functions.

Many of the dates required affect more than one area of Campus Solutions, such as withdrawal dates. Keep in mind that the Student Financials, Financial Aid, and Student Records applications all must use dates that match the dates set here.

Time Period The system uses time periods for enrollment security to secure access to various enrollment functions. Select a time period to enforce deadlines for performing enrollment access functions.

For example, at PSUNV, the enroll-function deadline for the advisors enrollment access ID *(ADV)* is set time period *110,* so that advisors can enroll students in classes through the first week of classes. To enforce this deadline for fall 2003 undergraduate enrollment in the regular session, PSUNV defines

time period 110 in this field and enters in the End Date field a date equal to the end of the first week of the regular session.

End Date Enter the date on which the time period ends for the session. Only one time period in the session is active at a time.

See Also

Chapter 14, “Securing Student Records,” Setting Up Enrollment Access IDs, page 234

CHAPTER 7

Defining Traditional Academic Calendars

This chapter provides an overview of academic calendars and enrollment request processing for drops, and also discusses how to define traditional academic calendars.

Understanding Academic Calendars

Academic calendars are systems by which you define the landmark dates that drive much of the day-to-day business at the academic institution. Each academic calendar contains cancel, withdrawal, and drop deadlines along with other landmark dates that vary, depending on the academic calendar type. As you define academic calendars, it is important to consider how the dates in these calendars affect all of the business processes (such as class enrollment, tuition refunds, and statistical reporting). All applications in Campus Solutions use the academic calendar dates in many of their business processes.

Campus Solutions enables you to create two types of academic calendars. The type that you create depends on the academic structure and business needs of the academic institution. For a traditional approach, you can create academic calendars with static landmark dates based on the term and session structure. For a flexible approach, you can create academic calendars with which you dynamically calculate landmark dates for individual classes *or* students.

A traditional academic calendar is based solely on term and session structure. For each academic career at the academic institution, you must define at least one academic calendar. Thus, you can potentially have as many academic calendars as you have academic careers. For each academic calendar, you must define the cancel, withdrawal, and drop deadlines for each session within each term of an academic career. Because each academic career within an academic institution has its own academic calendar, you can define different landmark dates for each academic career. To associate a traditional academic calendar with a student, you must activate the student into a term within the student's academic career, which in turn ties the appropriate academic calendar to the student. Thus, the dates on the academic calendar for that academic career and term combination drive the student's academic program. Academic calendars are a prerequisite to term activation. You use the Academic Calendar component to define traditional academic calendars, based on the term and session structure.

Note. If you use dynamic academic calendars, you must still set up traditional academic calendars for academic career and term combinations to activate students into terms and to enter landmark dates that dynamic academic calendars do not define.

Understanding Enrollment Request Processing for Drops

When processing enrollment requests with an enrollment action of drop through the Quick Enroll, Enrollment Request, and Block Enroll components or through self-service, the enrollment engine must determine the drop deadlines, reasons, grading bases, and grades with which to update the impacted student enrollment records (STDNT_ENRL).

The enrollment engine determines drop deadlines, grading bases, and grades differently depending on the class enrollment type (traditional, dynamic date, OEE).

When requesting to drop a *traditional class enrollment,* the enrollment engine:

- Determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Session Calendar 2 page.

When requesting to drop a *dynamic date class enrollment,* the enrollment engine:

- Determines the deadlines according to the values that the Dynamic Class Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) calculates and displays on the Dynamic Class Data page.

  If you have not calculated the academic calendar dates for the class, the enrollment engine determines the deadlines according to the values set on the Academic Calendar 2 page.
- Determines the grading scheme and grade, if applicable, according to the value set on the Grading Scheme Table page.

  If there is no grade set on that page and you have calculated the academic calendar dates for this class, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If there is no grading scheme and grade set on that page, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

  If there is no grade set on that page and you have *not* calculated the academic calendar dates for this class, the enrollment engine uses the grading scheme and grades set on the Session Calendar 2 page.

When requesting to drop an *OEE class enrollment,* the enrollment engine:

- Determines the deadline according to the values that it calculates upon enrollment and displays on the Student Enroll OEE page.

  If the deadlines have not been calculated, the request fails.
- Determines, if applicable, the grading scheme and grade according to the value set on the Grading Scheme Table page.

  If there is no grade set on that page, the enrollment engine uses the grading schemes and grades set on the Dynamic Date page of the Academic Program Table component. If there is no grading scheme and grade set on that page, the request fails.

Regardless of the class enrollment type, the enrollment engine determines the reason according to the enrollment action reason that you enter on the enrollment processing page. If you do not enter a value on the enrollment processing page, then, for drop transactions during the drop retain record period only, the enrollment engine uses the reason set on the Session Calendar 2 page. Otherwise, the engine assigns no reason.

If the institution wants to retain student enrollment records during the drop delete period, you can associate time periods to enrollment action reasons on the Enrollment Action Reason Table page. When you create an enrollment request with an enrollment action of drop, you can then select an enrollment action reason that has a time period associated with it. For these requests to drop that are during the drop delete period, the enrollment engine retains the impacted student enrollment records so long as the time period has not passed.

Note. The enrollment engine does not prevent enrollment request transactions after the drop deadlines. If you submit a request to drop after the latest drop deadline, the enrollment engine displays a message that the latest drop deadline has passed and continues with the processing.

Defining Traditional Academic Calendars

To set up traditional academic calendars, use the Academic Calendar component (ACAD_CALENDAR_TBL). Use the SSR_ACAD_CALENDAR_TBL component interface to load the data into the table for this component interface.

This section discusses how to:

- Describe academic calendars.
- Set up term landmark dates.
- Define self-service graduation terms.
- Set up session cancellation and withdrawal dates.
- Set up session drop dates.

Pages Used to Define Traditional Academic Calendars

Page Name	Object Name	Navigation	Usage
Term Calendar 1	ACAD_TERM_CAL1	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 1	Describe academic calendars for an academic career.
Term Calendar 2	ACAD_TERM_CAL2	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 2	Dates on this page are informational only and are not required. When you perform a term withdrawal or cancellation, the Stud Records Term Withdrawal COBOL/SQL process (SRPCWDPR) uses dates defined for the session, not the term.
Term Calendar 3	ACAD_TERM_CAL3	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 3	Set up term landmark dates for students who are active in the specified term for the specified academic career. These landmark dates are for class enrollment, graduation, statistical reporting, and transcript purposes.
Term Calendar 4	ACAD_TERM_CAL4	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Term Calendar 4	Define valid graduation application dates for each term. The system uses the date range to control the values that students can select in the Expected Graduation Term field on the Apply for Graduation – Select Graduation Term page.
Session Calendar1	ACAD_SESN_CAL2_TBL	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 1	Set up the class cancellation and withdrawal deadlines and data that the Stud Records Term Withdrawal process uses when a student cancels or withdraws from a term or session within a specified academic career.
Session Calendar2	ACAD_SESSN_CAL_TBL	Set Up SACR, Foundation Tables, Term Setup, Academic Calendar, Session Calendar 2	Set up the session drop deadlines that the enrollment engine uses when a student drops a class within a particular session of an academic career.

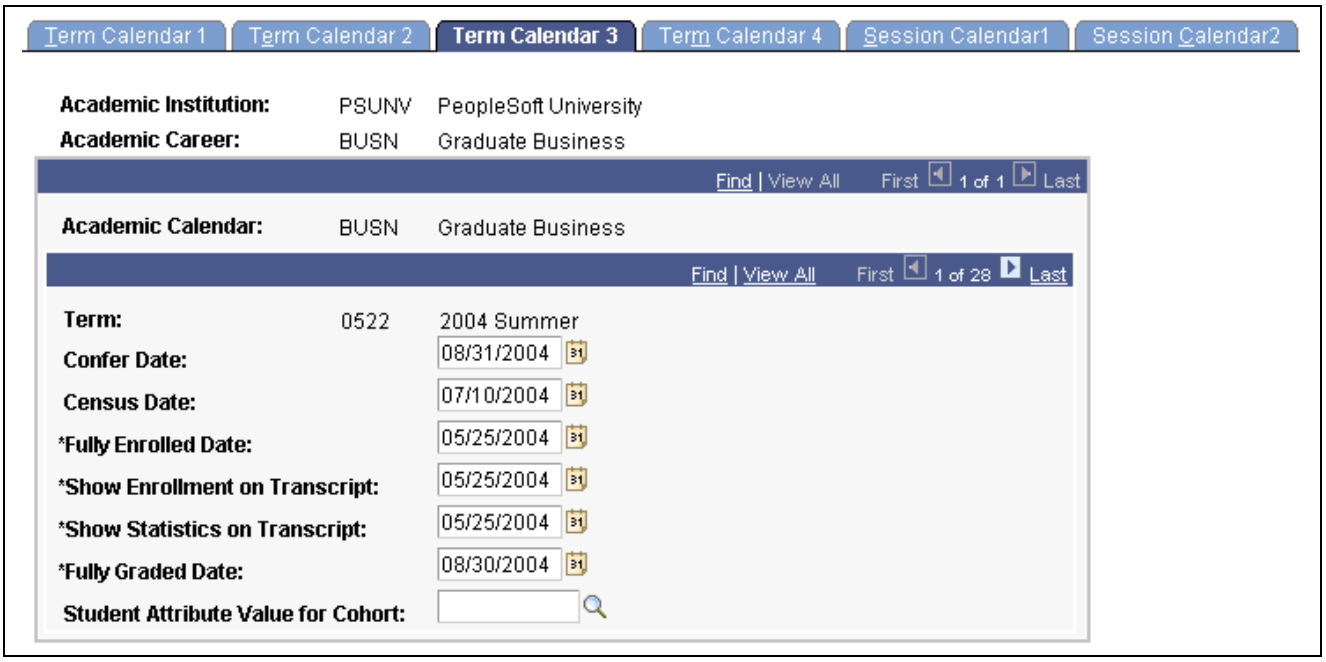
Describing Academic Calendars

Access the Term Calendar 1 page.

Academic Calendar Enter a code that represents this academic calendar. If you have multiple academic careers that use the same academic calendar, set up the academic calendar for each of those academic careers, entering the same academic calendar code for each academic career.

Setting Up Term Landmark Dates

Access the Term Calendar 3 page.



Term Calendar 3 page

Confer Date Enter the degree conferral date that the system uses for students who are active in the specified term for the specified academic career and are graduating at the end of the specified term. The system uses this date when you post degrees.

Census Date Enter the official cutoff date for census statistics for the term.

Fully Enrolled Date Enter the date on which the students who are active in the specified term for the specified academic career are considered fully enrolled in the specified term. As of this date, the students' coursework appears on their transcripts when you select the Obey Enrollment on Transcript Date check box on the Enrollment/Statistics page of the Transcript Type component. This date is also used for financial aid load calculations and billing purposes.

Show Enrollment on Transcript Enter the date on which the in-progress enrollment appears on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Transcript Type – Basic Data page whether the transcript processes should obey this date and display in-progress enrollment information.

Show Statistics on Transcript Enter the date on which academic statistics appear on transcripts for students who are active in the specified term for the specified academic career. When you define transcript types, you can indicate on the Transcript Type – Basic Data page whether the transcript processes should obey this date and display term statistics.

Fully Graded Date Enter the date on which the system considers a student fully graded. The student must be active in the specified term for the specified academic career. The system populates this value by default for students on the Term Control Dates page in the Term Activation component. In addition, the system populates this value by default to the STDNT_CAR_TERM record when you run the Term Activation process or the Term Activation Update SQR process (SRTRMAC). When you define transcript types, you can indicate on the Transcript Type – Enrollment Statistics page whether the transcript processes should obey this date and only display classes considered fully graded. In other words, the system prints only those classes with fully graded dates less than or equal to the run date.

Student Attribute Value for Cohort Currently not in use.

Defining Self-Service Graduation Terms

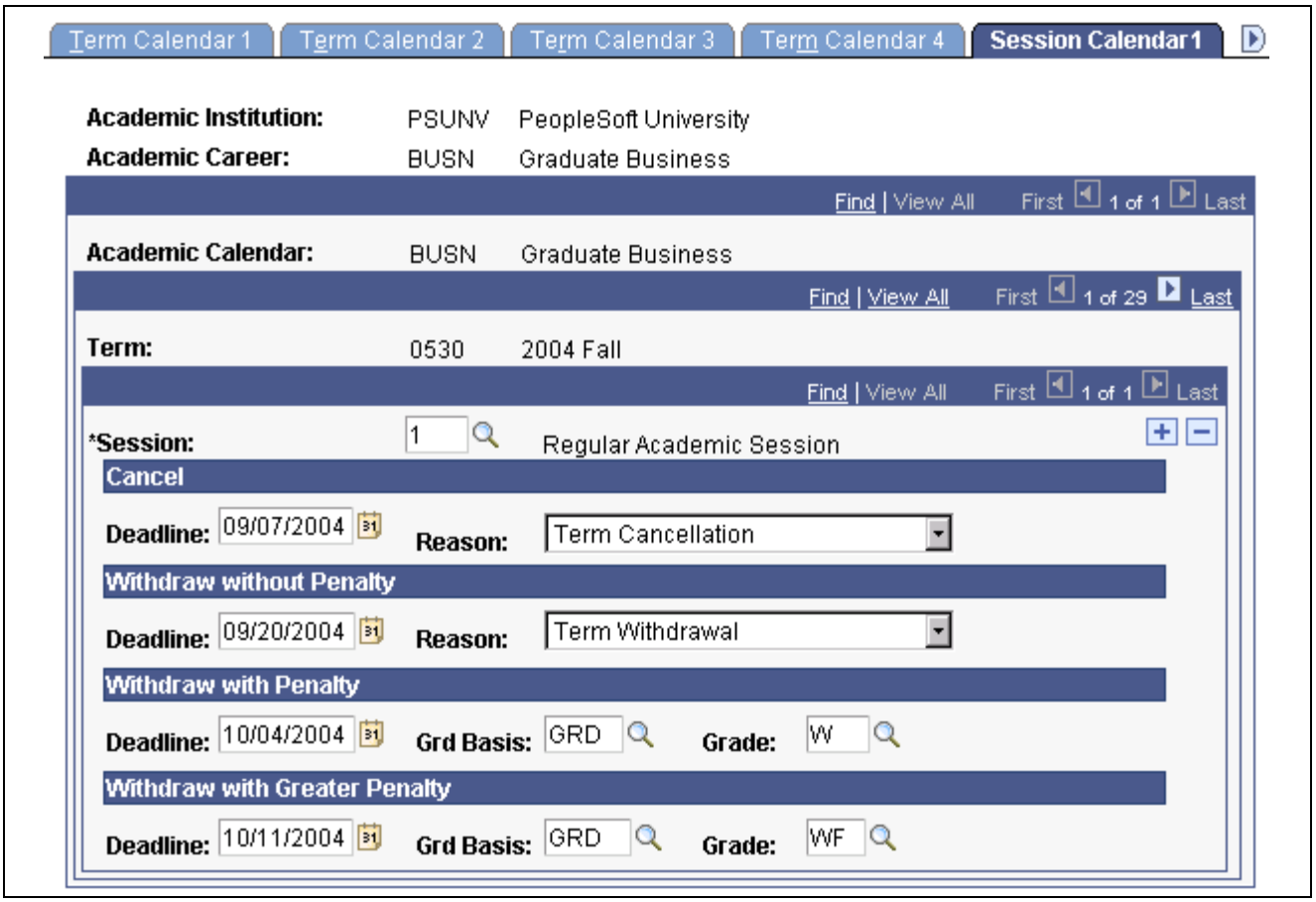
Access the Term Calendar 4 page.

See Also

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook, "Using Self-Service Degree Progress/Graduation," Applying for Graduation Through Self-Service Pages

Setting Up Session Cancellation and Withdrawal Dates

Access the Session Calendar1 page.



Session Calendar1 page

Note. For academic institutions that offer an open entry/exit (OEE) session for a term, you are not required to define an OEE session calendar because the cancel, withdraw, and drop information is part of the Open Entry/Exit Dynamic Date rule.

Session Select the session within the term for which you want to define the specified academic calendar for the specified academic career.

Cancel

Deadline Enter the last date on which students within the specified academic career can cancel their enrollment in a class for this session. Penalty grades are not assigned to cancellations.

Reason Select the reason value that you want the Student Records Term Withdrawal process to assign to impacted student enrollment records.

Withdraw without Penalty

Deadline Enter the last date on which students within the specified academic career can withdraw from a class within this session without any grade point average (GPA) penalty.

Reason Select the reason value that you want the Student Records Term Withdrawal process to assign to impacted student enrollment records.

Withdraw with Penalty

Deadline Enter the last date on which students within the specified academic career can withdraw from a class within this session with penalty. If a student withdraws from the class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-penalty grade. The refund impact is based upon the refund dates and periods as defined within Student Financials.

Grd Basis (grading basis) Select the grading basis from which you want to choose the withdraw-with-penalty grade.

Grade Select the grade that students within the specified academic career receive for a class within this session if the student withdraws after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

Withdraw with Greater Penalty

Deadline Enter the last date on which students within the specified academic career can withdraw from a class within this session with greater penalty. If a student withdraws from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline, the class appears on the student's transcripts and affects the student's GPA in proportion to the value of the withdraw-with-greater-penalty grade. The refund impact is based upon the refund dates and periods as defined within Student Financials.

Grd Basis (grading basis) Select the grading basis from which you want to choose the withdraw-with-greater-penalty grade.

Grade Select the grade that students within the specified academic career receive for a class within this session if they withdraw from the class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

See Also

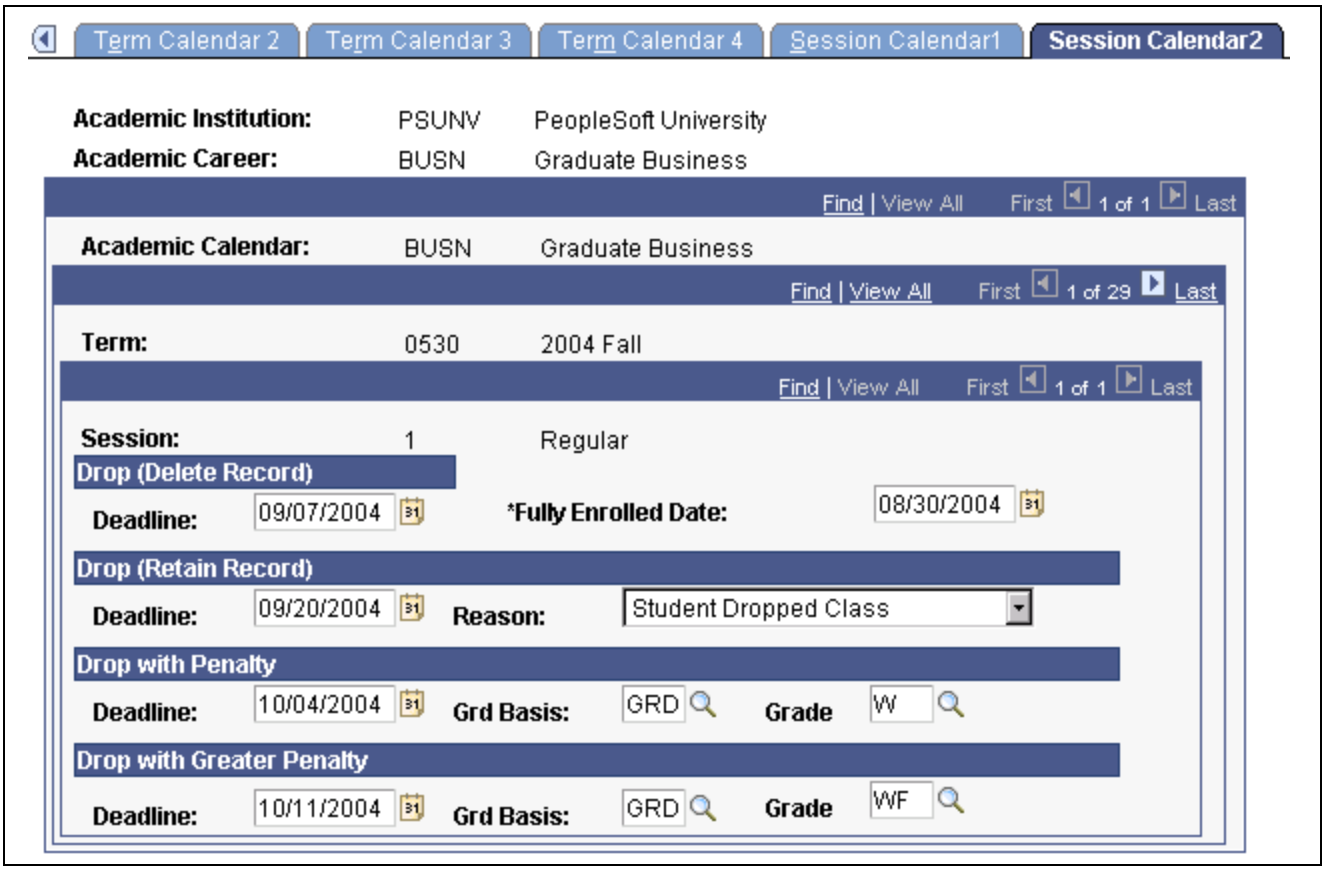
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Grading," Defining Grading Schemes

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Using Enrollment Related Processes," Understanding Withdrawal and Cancellation Processing

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Refunding Customers"

Setting Up Session Drop Dates

Access the Session Calendar2 page.



Session Calendar2 page

Drop (Delete Record)

Deadline Enter the last date on which students within the specified academic career can drop a class within the specified session and have their enrollment record for the class deleted from the student enrollment table (STDNT_ENRL). The dropped class does not have any GPA penalty. The refund impact is based upon the refund dates and periods as defined within Student Financials. When you are using one of the enrollment pages to drop a student from a class during this period and you add an enrollment action reason, the enrollment engine automatically retains the student enrollment record.

Fully Enrolled Date Enter the date on which the students who are active in the specified session for the specified academic career are considered fully enrolled in the specified session. As of this date, the students' coursework appears on their transcripts. This date is also used for financial aid load calculations and billing purposes.

Drop (Retain Record)

Deadline Enter the last date on which students within the specified academic career can drop from a class within the specified session without having the class appear as a drop on their transcripts and without any GPA penalty. If a student drops a class *after* the drop-and-delete-record deadline but *on or before* the drop-and-retain-record deadline, the system retains the student's enrollment record, sets the record to dropped status, and designates the reason. The

refund impact is based upon the refund dates and periods as defined within Student Financials.

Reason Select the default reason for the class drop. You can modify these translate values.

Drop with Penalty

Deadline Enter the last date on which students within the specified academic career can drop a class within the specified session without having any GPA penalty. If a student drops the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.

Grd Basis (grade basis) Select the grading basis from which you want to choose the drop-with-penalty grade.

Grade Select the penalty grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-and-retain-record deadline but *on or before* the drop-with-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

Drop with Greater Penalty

Deadline To specify a greater level of penalty, enter the last date on which students within the specified academic career can drop a class within the specified session without greater penalty. If a student drops the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline, the system retains the student's enrollment record, leaves the record as enrolled status, and assigns the drop-with-greater-penalty grade that you specify on this page. The refund impact is based upon the refund dates and periods as defined within Student Financials.

Grd Basis (grade basis) Select the grading basis from which you want to choose the drop-with-greater-penalty grade.

Grade Select the grade that students within the specified academic career receive for a class within the specified session if they drop the class *after* the drop-with-penalty deadline but *on or before* the drop-with-greater-penalty deadline. The grade for the class appears on students' transcripts and affects their GPA accordingly.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Grading," Defining Grading Schemes

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Processing Class Enrollment Transactions"

CHAPTER 8

Defining Dynamic Academic Calendars

This chapter provides an overview of dynamic academic calendars and discusses how to:

- Create dynamic class date rules.
- Set up dynamic class dates.
- Calculate dynamic academic calendars by term.
- Manage dynamic academic calendars for class sections.
- Manage dynamic academic calendars for open entry/exit (OEE) enrollments.

Understanding Dynamic Academic Calendars

If you use the traditional way to design an academic structure in PeopleSoft Enterprise Student Records, you define the terms, sessions, and academic calendars that control the various academic programs. You use these three elements to determine the significant dates and time periods within each session. For example, you use the academic calendar to set up drop and withdrawal deadlines for each session. However, this academic structure can be limiting.

A dynamic academic calendar provides more flexibility than static landmark dates based on term and session structure. This type of calendar enables you to dynamically control landmark dates for individual classes and even for student enrollments themselves. You might use dynamic academic calendars, for instance, if the academic institution has a rolling admission and enrollment business process that enables students to begin academic programs at any point in the calendar year. In this case, many classes that you offer might use their own academic calendars because the classes have their own deadlines and landmark dates. You can also use dynamic academic calendars if the academic institution offers students open entry enrollment into classes so that the students can enroll at any time during the calendar year and complete the classes at their own pace. Many classes taught over the internet use this type of enrollment, which is called *open entry/exit* (OEE) enrollment.

In a dynamic academic calendar, you establish flexible rules, called *dynamic class date rules,* which enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments. You can override the calculations on a case-by-case basis. Consequently, the academic institution can create classes that begin and end at various times throughout a term and session, then dynamically calculate the landmark dates for individual classes based on the dynamic date rules that you assign to classes. In addition, the academic institution can set up OEE enrollment for these classes with dynamic dates so that the enrollment engine calculates landmark dates for each student who enrolls in one of the classes based on the student's enrollment begin date and the OEE dynamic date rule that you assign to the class.

Use the Dynamic Class Dates feature to create dynamic academic calendars for individual classes within a session and for individual OEE student enrollments.

To create dynamic academic calendars:

1. Create dynamic date rules.
2. Set up the academic structure.
3. Schedule the class sections for which you want to create dynamic academic calendars.
4. Calculate landmark date deadlines for the dynamic academic calendars using the Dynamic Class Dates COBOL/SQL process (SRPCDYNP).

There are several ways to calculate these deadlines. For multiple class sections within a term, use the Dynamic Class Dates process page. For individual class sections use the Dynamic Class Data page. For OEE enrollments, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section, and the system calculates the deadlines.

Warning! Because the Dynamic Dates Process creates the Dynamic Class Dates table that the system uses for enrollment transactions, you *must* run the process for classes scheduled in a dynamic date session before you perform enrollment transactions. If you do not run the process, the system has no indication that a rule exists and it might, for example, permit all class drops. This warning does not apply to classes scheduled in OEE sessions.

Dynamic Date Rules

The Dynamic Dates COBOL/SQL process (SRDYNADT and SRPCDYNP) uses a dynamic class date rule to calculate deadlines for landmark dates on the dynamic academic calendars that the process creates. There are two types of dynamic class date rules. The first type, a *dynamic class date rule,* is used to create dynamic academic calendars for individual class sections within a session. The second type, an *OEE dynamic date rule,* is a dynamic class date rule that is designated for open OEE enrollment. The enrollment engine uses the OEE dynamic date rule in conjunction with students' enrollment start dates to calculate dynamic academic calendars for the students whenever they enroll in OEE classes. Regardless of the type of rule that you define, for each rule you must specify the rule schemes, rounding schemes, and factors that the Dynamic Class Dates process uses to calculate the landmark dates on a dynamic academic calendar.

You define a *rule scheme* for the landmark date of a dynamic class date rule. A rule scheme indicates the method that the Dynamic Class Dates process uses as a basis for calculating the applicable landmark date. Your selection varies depending on the type of rule that you define. All rule schemes are valid for dynamic class date rules, but rule schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rule schemes based on these factors:

- The number of class meetings.
- A percentage of class meetings.
- A percentage of total class hours.
- A point between class start and end date (OEE).
- The day before or after class start date (OEE).
- The day before or after class end date (OEE).

Then you define a *rounding scheme* for the landmark date of the dynamic class date rule. A rounding scheme enables you to round the deadline up or down to various days. After the Dynamic Class Dates process determines the landmark date according to the rule scheme and factor (known as the *basis day*), it adjusts that date according to the rounding scheme. All rounding schemes are valid for dynamic class date rules, but rounding schemes that relate to class meetings are invalid for OEE dynamic date rules because of the nature of OEE classes.

You can define rounding schemes that use these days:

- Basis day (OEE)
- Beginning of next week (OEE)
- Beginning of week (OEE)
- End of next week (OEE)
- End of week (OEE)
- First meeting of week
- Last meeting of week
- Next day (OEE)
- Next meeting day
- Previous day (OEE)
- Previous meeting day

You must also define a *factor* for the landmark date of the dynamic class date rule. A factor instructs the Dynamic Class Dates process how many units to move the deadline either forward or backward, based on the rule scheme. For example, if you use the percentage of class meetings for the rule scheme and you want the deadline to be at the halfway point of the class, you would enter *.50* (fifty percent).

The Dynamic Class Dates process uses the rule scheme and factor to determine the basis day. If the rule scheme uses the number of class meetings, a percentage of class meetings, a percentage of total class hours, or a point between class start and end date (for non-OEE classes), then the basis day is the class meeting with the maximum value that does not exceed the specified factor. After the Dynamic Class Dates process determines the basis day, it applies the rounding scheme to the basis day to determine the deadline. If the rule scheme uses a point between class start and end date (OEE classes), the day before or after class start date, or the day before or after class end date, then the basis day is the actual calculated date.

Examples of Dynamic Class Date Rules

This section discusses examples of how the Dynamic Dates process calculates deadlines for a dynamic academic calendar.

Suppose that you schedule a class that meets every Wednesday for 7 weeks starting March 4. In the Last Wait List Date group box on the Dynamic Class Dates page, you select *Percentage of Class Meetings* as the rule scheme and *Beginning of Next Week* as the rounding scheme. You also set the factor to *.30* (thirty percent). The Dynamic Class dates process would calculate the last wait list date as shown in this table:

Meeting	1	2	3	4	5	6	7
Date	March 4	March 11	March 18	March 25	April 1	April 8	April 15
Percentage	14%	28%	43%	57%	71%	86%	100%

Based on the rule scheme and factor, the basis day would be the second meeting. By using the basis day as a starting point, the process then rounds the deadline up or down based on the rounding scheme that you specify. In this example, the last day to waitlist the class would be Monday, March 16, which is the beginning of the next week.

This table shows other possible deadlines in this example, depending on the rounding scheme that you select:

Last Wait List Date Rounding Scheme	Last Wait List Date Deadline
Basis day.	March 11
Previous day.	March 10
Next day.	March 12
Next meeting day.	March 18
Beginning of week (Monday).	March 9
Previous meeting day.	March 4
Beginning of next week (next Monday).	March 16

Because the system dynamically calculates the landmark dates of the academic calendar, you can apply the same rule to any number of classes.

To further illustrate how the system uses the dynamic class date rule that you create, suppose that you have a 10-week class that meets once a week, starting January 1. In the Drop Dates group box on the Dynamic Class Dates page, you select a rule scheme of *Number of Class Meetings* and a rounding scheme of *Basis Day.* You have four drop deadlines—drop and delete record, drop but retain record, drop with penalty, and drop with greater penalty. The consequence of violating each deadline becomes more severe as time passes. Suppose that you want these deadlines to occur a week apart, starting the second week of class. You would enter *2* in the Drop Deadline (delete) Factor field, *3* in the Drop Deadline (retain) Factor field, *4* for the Drop Deadline (Penalty) Factor field, and *5* for the Drop Deadline (Penalty2) Factor field.

After you save the rule and assign it to the appropriate class, the Dynamic Class Dates process can dynamically calculate each of these drop deadlines for the class. According to the rule scheme and factors that you specified, the process calculates the basis day for each of the drop deadlines as January 8, January 15, January 22, and January 29. In this scenario, because you have used a basis day rounding scheme, the process determines that the drop deadlines are the same as the dates for the basis days.

Creating Dynamic Class Date Rules

To set up dynamic class date rules, use the Dynamic Class Dates component (DYN_CLASS_TBL).

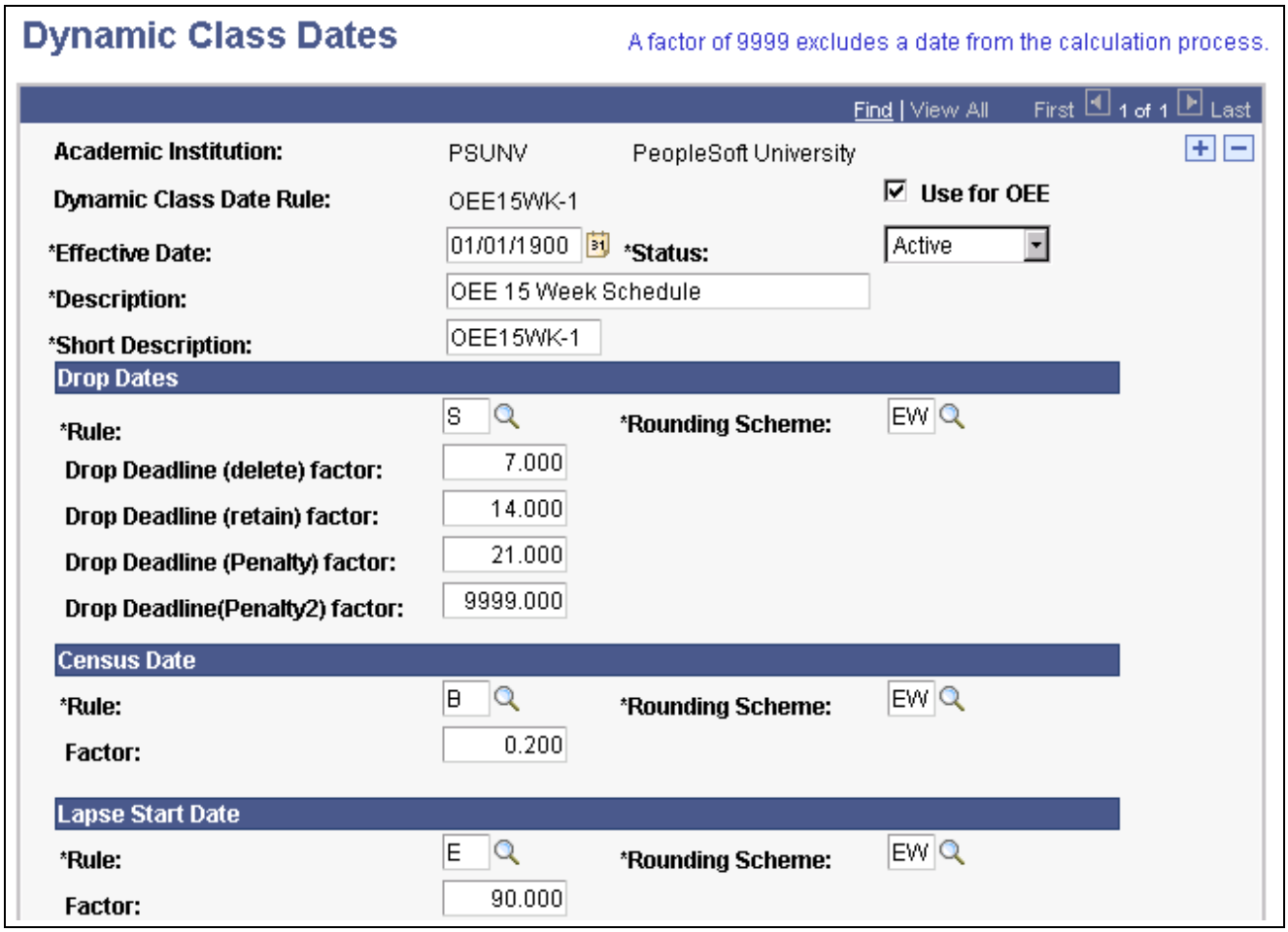
This section discusses how to establish dynamic class date rules.

Page Used to Create Dynamic Class Date Rules

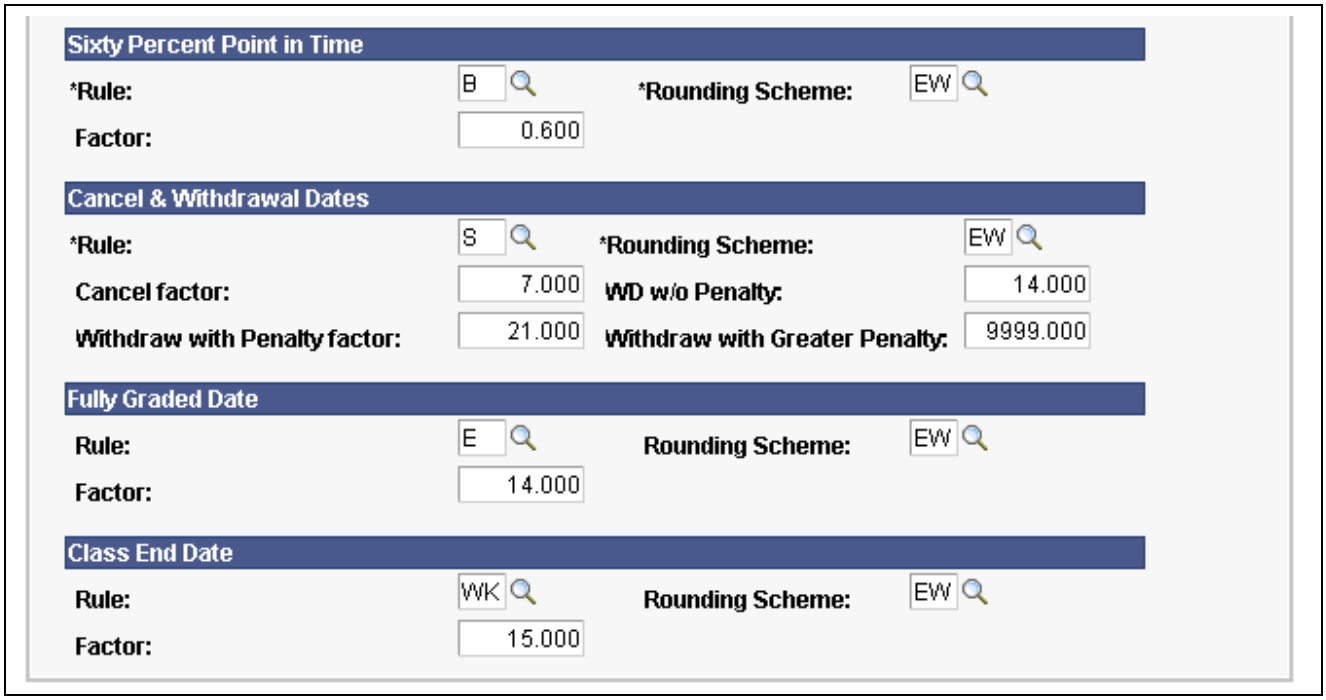
Page Name	Object Name	Navigation	Usage
Dynamic Class Dates	DYN_CLASS_DATA_TBL	Set Up SACR, Product Related, Student Records, Curriculum Management, Dynamic Class Dates	Establish dynamic class date rules and OEE dynamic date rules for an academic institution. Rules enable you to dynamically calculate cancel, withdrawal, and drop deadlines and other landmark dates. You then apply these rules to various parts of the academic structure so that you can calculate the landmark calendar dates for individual classes or student enrollments.

Establishing Dynamic Class Date Rules

Access the Dynamic Class Dates page.



Dynamic Class Dates page (1 of 2)



Dynamic Class Dates page (2 of 2)

Use for OEE (use for open entry/exit) Select to make this dynamic class date rule applicable *only* to OEE class sections. This option distinguishes the rule as an OEE dynamic date rule. Clear the check box to make the dynamic class date rule applicable only to regular dynamically dated class sections. Depending on your selection, the dates for which you must define rules, rounding schemes, and factors vary according to individual needs, as do the translate values for the Rule and Rounding Scheme fields. You *must* select a value for this check box before defining rule schemes, rounding schemes, and factors.

Drop Dates

In the Drop Dates group box, select the rule scheme, rounding scheme, and factors that the Dynamic Dates process uses to calculate the drop deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the drop-and-retain-record deadline and the grade for the drop-with-penalty deadlines according to the student's primary academic program. Define reason codes and grades for drops by academic program on the Dynamic Date page of the Academic Program Table component.

Census Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the census date for classes or OEE enrollments to which this rule applies. The census date is the official cutoff date for census statistics.

Lapse Start Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the lapse start date for classes or OEE enrollments to which this rule applies. The lapse start date is the first date on which a student's grade lapses. This date determines when the grade lapse rules go into effect for students.

Sixty Percent Point In Time

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the 60 percent point in time for classes or OEE enrollments to which this rule applies. The 60 percent point in time is the date that you consider the class or OEE enrollment to be 60 percent complete. The system uses this date when computing refunds. In the U.S., the majority of academic institutions stop issuing refunds at this point in time.

Cancel & Withdrawal Dates

Select the rule scheme, rounding scheme, and cancel factor that the Dynamic Class Dates process uses to calculate the cancel and withdrawal date deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the cancellation, and the grade for the withdraw-with-penalty deadlines, according to the student's academic program. Define reason codes and grades for withdrawals by academic program on the Dynamic Dates page of the Academic Program Table component.

Fully Graded Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the date on which a student is considered to be fully graded for classes or OEE enrollments to which this rule applies. This field is optional. When you define transcript types, you can indicate on the Transcript Type – Basic Data page whether the transcript processes uses this date and displays grades for classes within the term.

Class End Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the end date of a class for OEE enrollments to which this rule applies. This field is unavailable for when you define OEE dynamic date rules.

See Also

Chapter 7, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates, page 136

Chapter 7, "Defining Traditional Academic Calendars," Setting Up Session Cancellation and Withdrawal Dates, page 134

Setting Up Dynamic Class Dates

After you create dynamic class date rules, you must set up the Dynamic Class Dates feature within the academic structure so that you can create dynamic academic calendars.

To set up the Dynamic Class Dates feature:

1. On the Academic Career Table page, indicate in the Allow OEE Enrollment field whether by default you permit the scheduling of OEE class sections for all course offerings that you tie to an academic career.

   See Chapter 5, "Designing Your Academic Structure," Defining Academic Careers, page 82.

   See Chapter 5, "Designing Your Academic Structure," Describing Academic Career Parameters, page 83.

2. On the Academic Career Table 2 page, select the Use Dynamic Class Dates check box to make available the Dynamic Date page of the Academic Program Table component.

   You use the Dynamic Date page to set up the reasons and penalties for canceling, withdrawing from, and dropping dynamically dated classes. To define a default dynamic class date rule for courses within the academic career, select the rule in the Dynamic Class Date Rule field. To define a default OEE dynamic class date rule for the courses within the academic career, select the rule in the OEE Dynamic Date Rule field.

   See Chapter 5, "Designing Your Academic Structure," Setting Additional Academic Career Parameters, page 85.

3. On the Program 1 page of the Academic Program Table component, indicate in the Allow OEE Enrollment field whether to permit OEE enrollment for students within a specific academic program.

   See Chapter 9, "Defining Programs, Plans, and Subplans," Describing Academic Programs, page 161.

4. On the Dynamic Date page of the Academic Program Table component, set up dynamic date fields for a specific academic program.

   This page is available only if you enable the Dynamic Class Dates features on the Academic Career Table 2 page. For students within an academic program to be able to drop or withdraw from OEE classes, you must define the values on the Academic Program – Dynamic Date page.

   See Chapter 9, "Defining Programs, Plans, and Subplans," Setting Up Dynamic Date Fields for Academic Programs, page 175.

5. On the Term Table page, select the Use Dynamic Class Dates check box to select the Dynamic Class Dates feature by default for each session created within a term.

See Chapter 6, "Establishing Terms and Sessions," Defining Terms, page 121.

6. On the Session Table page, select the Use Dynamic Class Dates check box to enable the Dynamic Class Dates feature for all classes that you schedule within a session.

   To schedule OEE class sections for a course within a particular academic institution, academic career, and term combination, for each combination you must define one OEE in the Session field.

   See Chapter 6, "Establishing Terms and Sessions," Defining Sessions, page 124.

7. On the Offerings page of the Course Catalog component, in the Dynamic Class Date Rule field, select the default rule that you want the Dynamic Class Dates process to assign to all class sections of the course offering that you schedule.

   To enable students to enroll in OEE class sections of a course offering, select the Allow OEE Enrollment check box. The OEE Dynamic Date Rule field becomes available. Then select a default OEE dynamic date rule that the system assigns to all OEE class sections of the course offering that you schedule. If you have assigned a dynamic class date rule or an OEE dynamic date rule on the Academic Career Table 2 page, the system uses that value in the corresponding field on the Course Catalog – Offerings page when you create a new course catalog record.

   See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Setting Up the Course Catalog," Defining Course Offerings.

8. On the Components page of the Course Catalog component, select the Primary Component check box to indicate the primary component of the course offering.

   Also, indicate the additional components that you want the Dynamic Class Dates process to include in its calculations by selecting the Include In Dynamic Date Calc (include in dynamic date calculations) check box for the component.

   See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Setting Up the Course Catalog," Defining Course Components.

9. On the Basic Data page of the Schedule New Course component, select the Include In Dynamic Date Calc check box to also include a nonprimary component of the class section in the Dynamic Class Dates process calculations.

   To schedule OEE class sections, you must select *OEE* in the Session field. Finish scheduling the class.

   See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Managing the Schedule of Classes," Defining Basic Data for Class Sections.

10. On the Class Components page of the Class Associations component, in the Primary Component field, select the primary component for the class that you are scheduling.

    Because the system takes the value for the primary component from the Course Catalog – Components page, use the Class Associations component only if you are changing the primary component for the term.

    See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, "Managing the Schedule of Classes," Modifying Class Components.

After you complete the setup for the Dynamic Class Dates feature, you can dynamically calculate the academic calendar landmark dates for classes.

Creating Dynamic Academic Calendars by Term

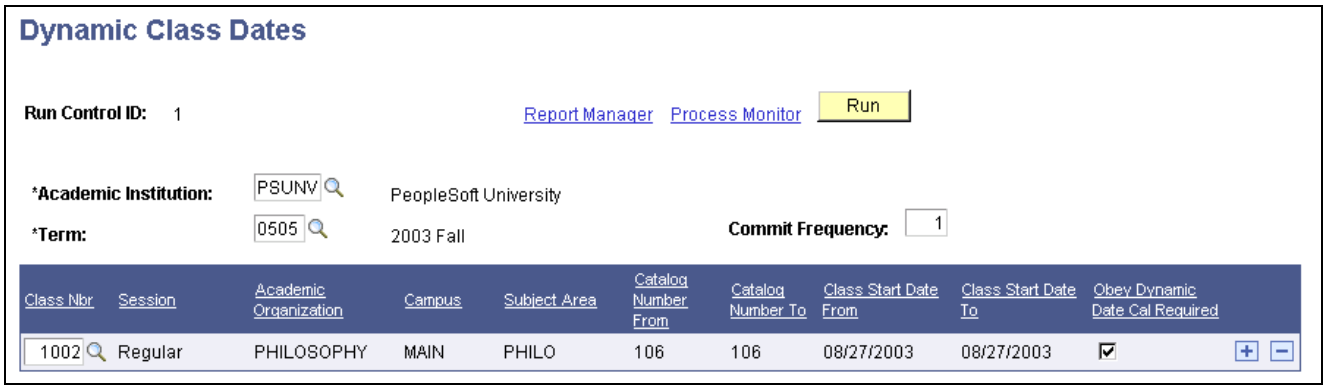
This section discusses how to calculate dynamic academic calendars by term.

Page Used to Calculate Dynamic Academic Calendars by Term

Page Name	Object Name	Navigation	Usage
Dynamic Class Dates	RUNCTL_SRPCDYNP	Curriculum Management, Dynamic Dates, Generate Dynamic Class Dates, Dynamic Class Dates	Dynamically calculate the academic calendar deadlines for class sections that you have scheduled for a term.

Calculating Dynamic Academic Calendars by Term

Access the Dynamic Class Dates page.



Dynamic Class Dates page

Use the fields in the lower portion of the page to select the criteria that the Dynamic Class Dates process uses to determine which class sections to process. Select as many criteria as necessary to include all the class sections for which the system must dynamically calculate academic calendar dates. After the system calculates the deadlines, you can view, override, and recalculate them on a section-by-section basis on the Dynamic Class Data page of the Dynamic Class Dates component.

Academic Institution Select the academic institution for which you want to run the Dynamic Class Dates process for multiple class sections. The system supplies this value from the User Defaults 1 page, but you can override the default value.

Term Select the term that contains the class sections for which you want to run the Dynamic Class Dates process.

Commit Frequency Enter a commit frequency. Lower commit frequencies provide better concurrence of data. Although higher commit frequencies enable faster job processing, jobs may become busy with other processes. It is recommended that you retain the default commit frequency or *1*.

Class Nbr (class number) Enter the class number for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules. The system displays the scheduled classes for the specified term and academic institution. After you enter the class number and exit the field, the system populates the values for the remaining selection criteria. To dynamically calculate academic calendar dates for multiple class sections on this row, leave this field blank.

Session Select the session (in the specified term and academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections. You can modify these

translate values. To dynamically calculate academic calendar dates for multiple sessions on this row, leave this field blank.

Academic Organization Select the academic organization (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Campus Select the campus (within the specified academic institution) for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Subject Area Select the subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Catalog Number From Enter the first catalog number in the range if you have a specific range of catalog numbers within a subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Catalog Number To Enter the last catalog number in the range.

Class Start Date From Enter the first class start date in the range if you have a specific range of class start dates for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Class Start Date To Enter the last class start date in the range.

Obey Dynamic Date Cal Required (obey dynamic date calculation required) Select to have the Dynamic Class Dates process include in its calculations only the components of a scheduled class section within a dynamically dated session for which the system has selected the Dynamic Date Calc Required (dynamic date calculation required) field on the Basic Data page of the schedule of classes. The system selects this field whenever you change the class meeting pattern for a component of a scheduled class section. Clear this check box to have the system calculate academic calendar dates and assign OEE dynamic date rules for all scheduled class sections.

Run Click to run this request. PeopleSoft Process Scheduler runs the Dynamic Class Dates SQL process at user-defined intervals. You can also select to run the Dynamic Class Dates SQR report (SRDYNADT), or the Dynamic Class Dates multiprocess job, which consists of both the Dynamic Class Dates process and the SQR report. After the process finishes, the system makes the rows that you included in the run request unavailable for editing, but it still displays these rows so that you can review the processing parameters of the run. These rows have no impact on future processing.

Managing Dynamic Academic Calendars for Class Sections

If you have attached the dynamic class date rule directly to the course offering, the Dynamic Class Dates process uses that rule every time that you run the process for a scheduled class section of that course offering. Although this ensures consistency and facilitates maintenance, you might want to apply rules directly to each class section, change the course offering default rule for specific class sections, or manually enter a deadline for a dynamic academic calendar date. You can use the Dynamic Class Dates component to accomplish these tasks and more. With this component, you can also view the class meeting patterns of class sections and Dynamic Class Date process messages.

This section discusses how to:

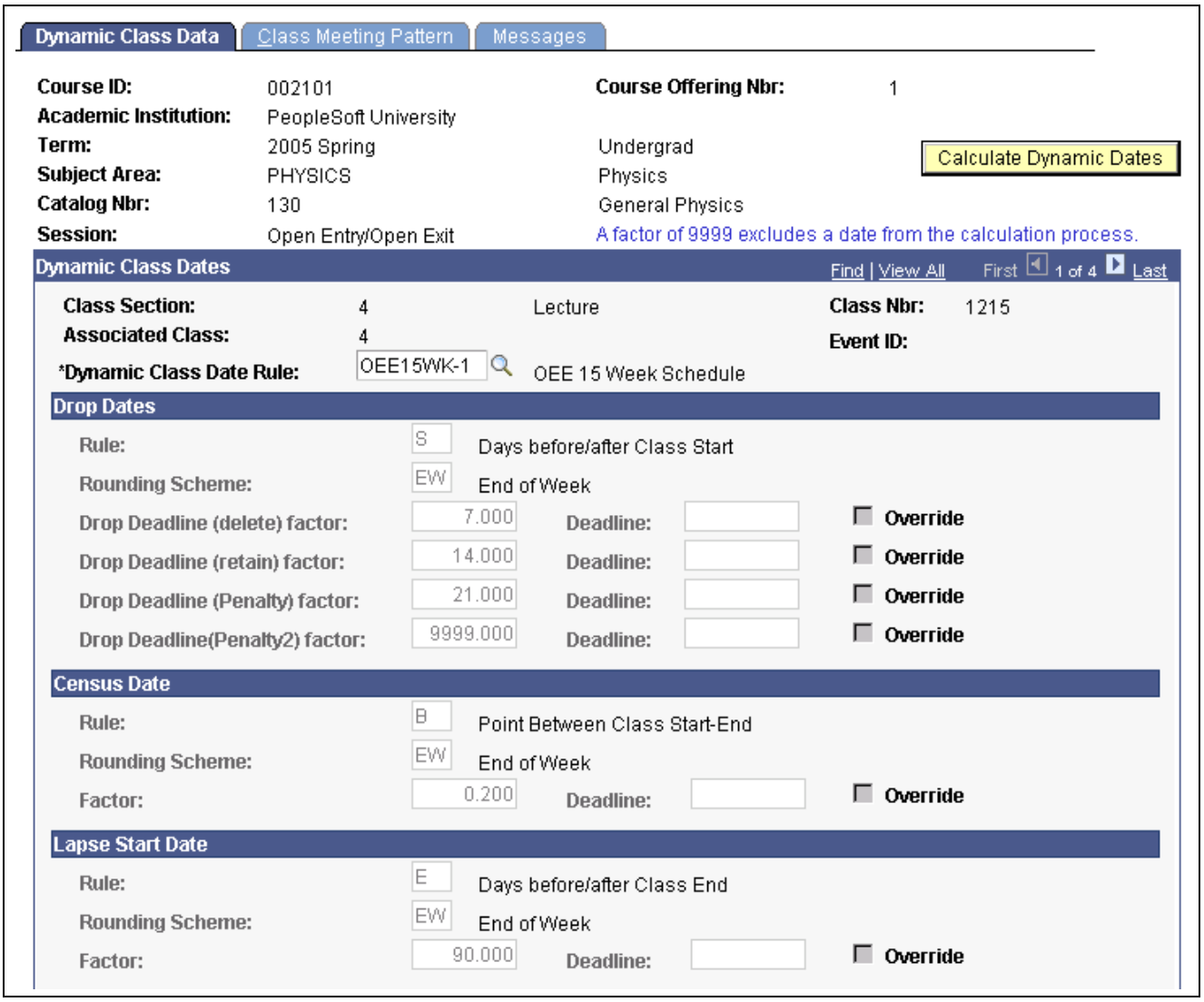
- Calculate, view, and override dynamic academic calendar dates.
- View class meeting patterns.
- View dynamic class date process messages.

Pages Used to Manage Dynamic Academic Calendars for Class Sections

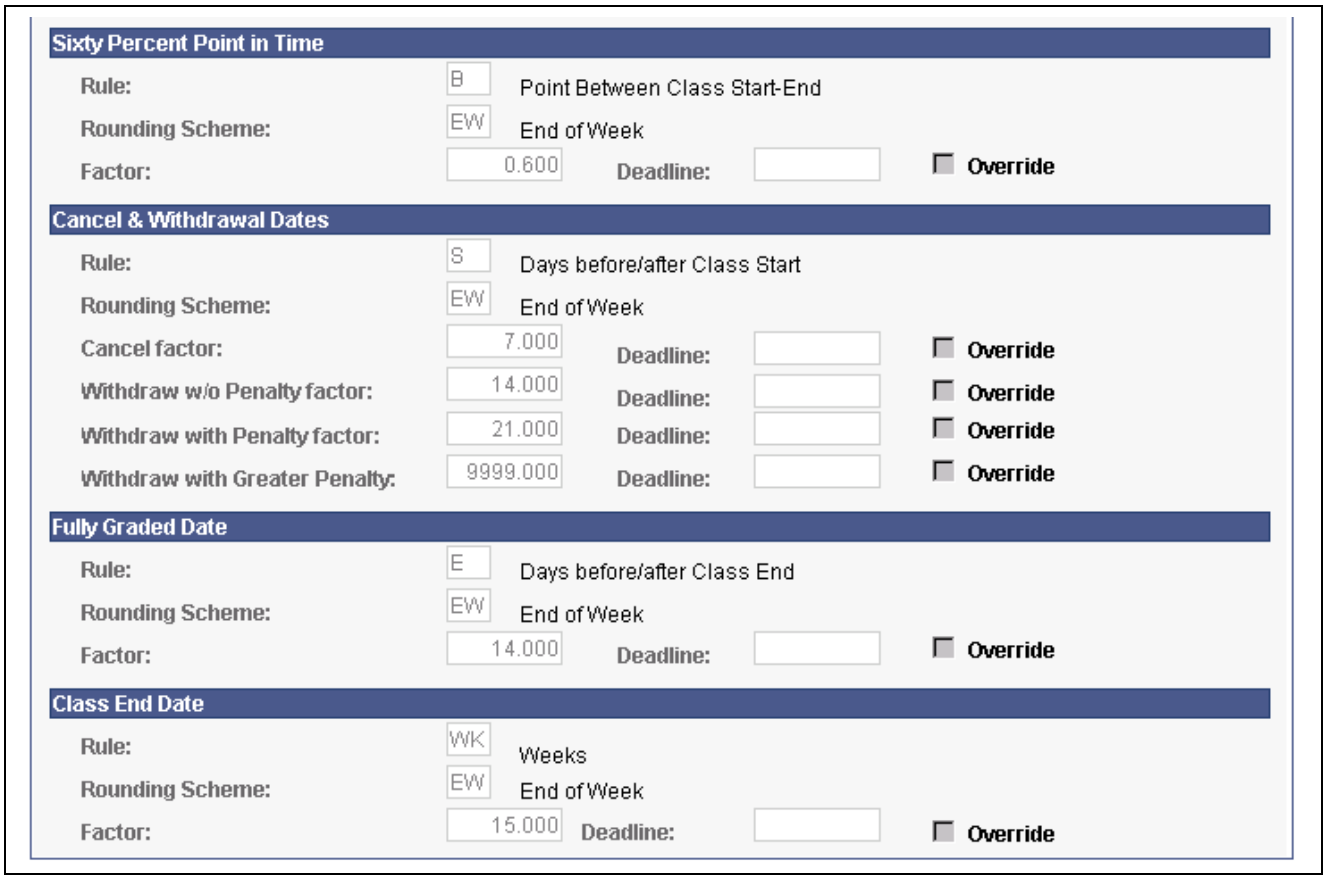
Page Name	Object Name	Navigation	Usage
Dynamic Class Data	DYN_CLASS_DATA1	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Dynamic Class Data	Run the Dynamic Class Dates process for a class section, or view and override the calculated results.
Class Meeting Pattern	DYN_CLASS_MTG_PAT	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Class Meeting Pattern	View the class meeting pattern of the class section for which you dynamically calculate academic calendar dates.
Messages	DYN_CLASS_DATA_MSG	Curriculum Management, Dynamic Dates, Class Section Dynamic Dates, Messages	View the Dynamic Class Date process status and messages related to each class section for which you have dynamically calculated academic calendar dates.

Calculating, Viewing, and Overriding Dynamic Academic Calendar Dates

Access the Dynamic Class Data page.



Dynamic Class Data page (1 of 2)



Dynamic Class Data page (2 of 2)

When you run the Dynamic Class Dates process, the Dynamic Class Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date found in the rule. Additionally, for non-OEE dynamic date sections, the process calculates and displays deadline dates. After you run the Dynamic Class Dates process, you can use this page to override the calculated deadlines. You can also use this page to attach a different rule to a class section and rerun the Dynamic Class Dates process.

Note. Assign a factor of *9999* to exclude a date from the calculation process.

Event ID Displays the event ID that the system associates with the section when you schedule the class.

Dynamic Class Date Rule Select the dynamic class date rule that you want to apply to each primary component class section when you run the Dynamic Class Dates process. Click the Calculate Dynamic Dates button to run the Dynamic Class Dates process. If you leave this field blank and click the Calculate Dynamic Dates button to run the process, the process assigns the rule that you specified on the Offerings page to each corresponding primary component class section. If you have already run the process using the Dynamic Class Dates process page, this field displays the rule that the process used to dynamically calculate the academic calendar dates. You can apply a different rule, as necessary, to a class section and rerun the process.

Calculate Dynamic Dates Click to run the Dynamic Class Dates process. The process dynamically calculates the academic calendar deadlines based on the rule that you have attached to the primary component class sections, either in the Dynamic Class Date Rule field or in the corresponding field on the Offerings page.

The process displays the calculated deadlines for each landmark date. If you make changes to the rule that applies to a class section after you have run the Dynamic Class Dates process, you must rerun the process to update these deadlines.

For OEE class sections, the process assigns and displays the associated rules, rounding schemes, and factors based on the rule that you have attached to a primary component class section, either in the Dynamic Class Date Rule field or in the corresponding field on the Offerings page. The system calculates deadlines for OEE class during enrollment processing.

Note. You can click this button as many times as necessary to have the Dynamic Class Dates feature calculate and recalculate the landmark date deadlines.

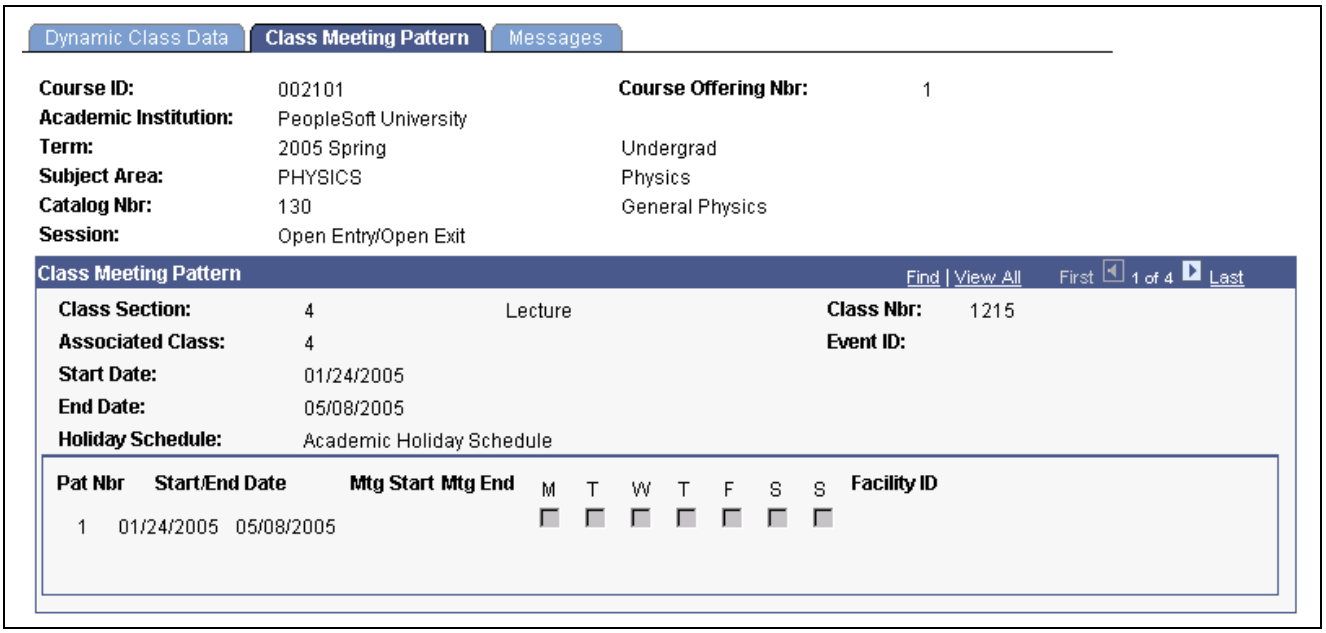
Deadline and **Override** The Dynamic Class Dates process displays the dynamically calculated deadline for the corresponding landmark date according to the dynamic class date rule that you apply to the class section. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline. The system calculates deadlines for OEE class during enrollment processing.

See Also

Chapter 8, "Defining Dynamic Academic Calendars," Creating Dynamic Class Date Rules, page 143

Viewing Class Meeting Patterns

Access the Class Meeting Pattern page.



Class Meeting Pattern page

The system displays the start and end date of the class section, plus class meeting pattern detail for all sections scheduled within a dynamic date or OEE session. If you have already calculated deadlines for the class section, this data enables you to determine if the calculated deadlines are appropriate or whether to override the deadlines or apply a different rule to the class section.

Holiday Schedule Displays the holiday schedule for the class section.

Pat Nbr (pattern number) Displays the sequence number that identifies the class meeting pattern of the section. The first row always indicates the class meeting pattern of the primary class component. Subsequent rows indicate additional class meeting patterns for a particular class section.

Start Date and **End Date** Displays the start and end dates of the class component.

Mtg Start (meeting start) and **Mtg End** (meeting end) Displays the meeting start and end time of the class component.

M (Monday), **T** (Tuesday), **W** (Wednesday), **T** (Thursday), **F** (Friday), **S** (Saturday), and **S** (Sunday) Indicates the days of the week that the class component meets.

Facility ID Indicates where the class component meets.

Viewing Dynamic Class Date Process Messages

Access the Messages page.

If the Dynamic Class Dates process encounters any difficulties when it calculates the deadlines for the class section, it writes a message to the message log and displays that message on this page. Use these messages to troubleshoot the problem.

Status Displays the status of the process run.

Message Text Displays any messages written to the message log that relate to the process run.

Severity Displays the severity of messages written to the message log that relate to the process run.

Set Displays the message catalog set to which the message belongs.

Message Number Displays a number that identifies the message within the message catalog set to which it belongs.

Managing Dynamic Academic Calendars for OEE Enrollments

If you have set up the academic structure such that a student can enroll in an OEE class, the enrollment engine runs the Dynamic Class Dates process at enrollment time for each student who enrolls in an OEE class section. The Dynamic Class Dates process uses the OEE dynamic date rule that you have associated with the class to calculate the deadlines. The process then stores these dynamically calculated deadlines for the student's OEE enrollment in the STDNT_ENROLL_OEE table. To view and override these deadlines, use the Student OEE Enroll Data page.

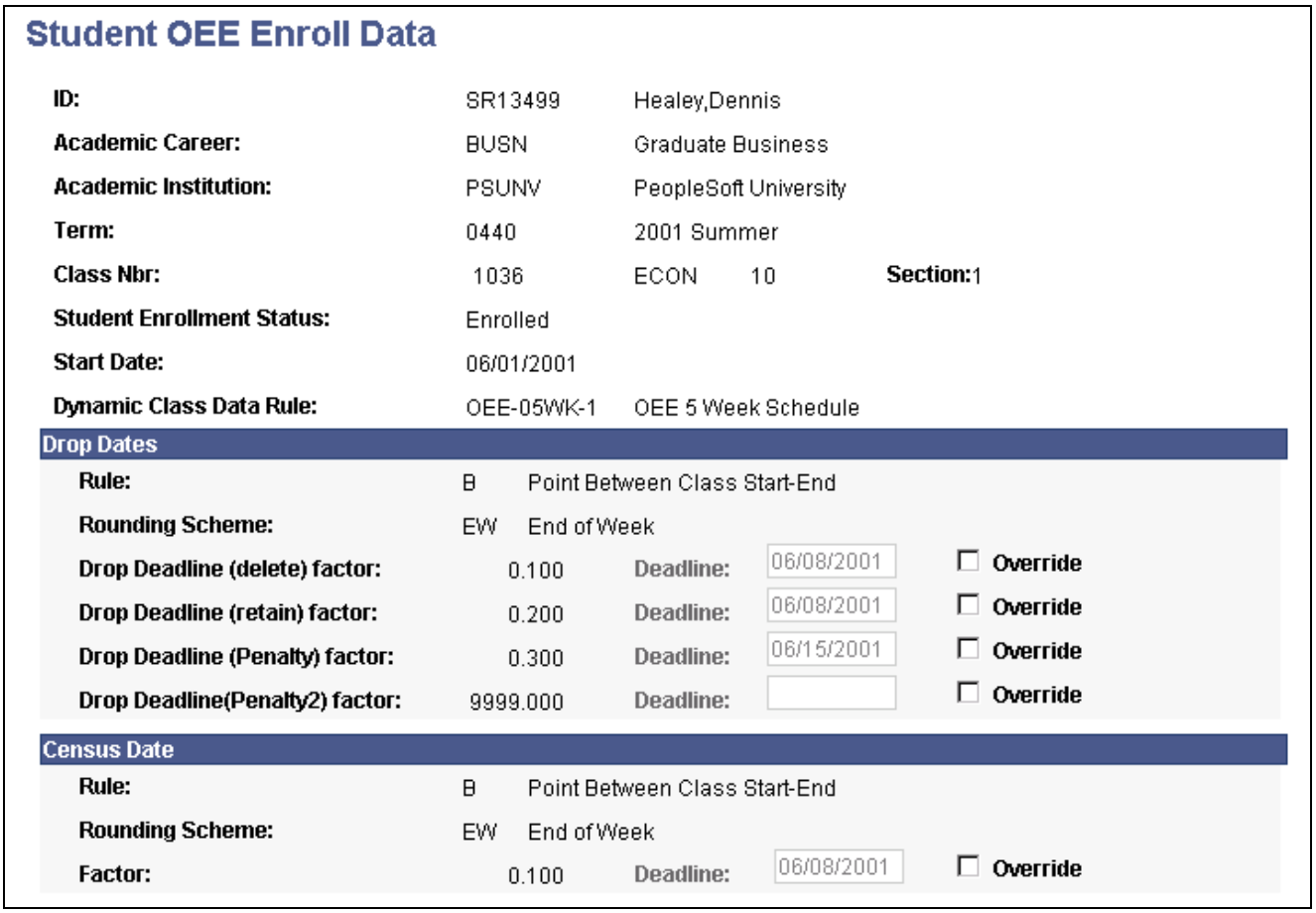
This section discusses how to view and override dynamic academic calendar dates for OEE enrollments.

Page Used to Manage Dynamic Academic Calendars for OEE Enrollments

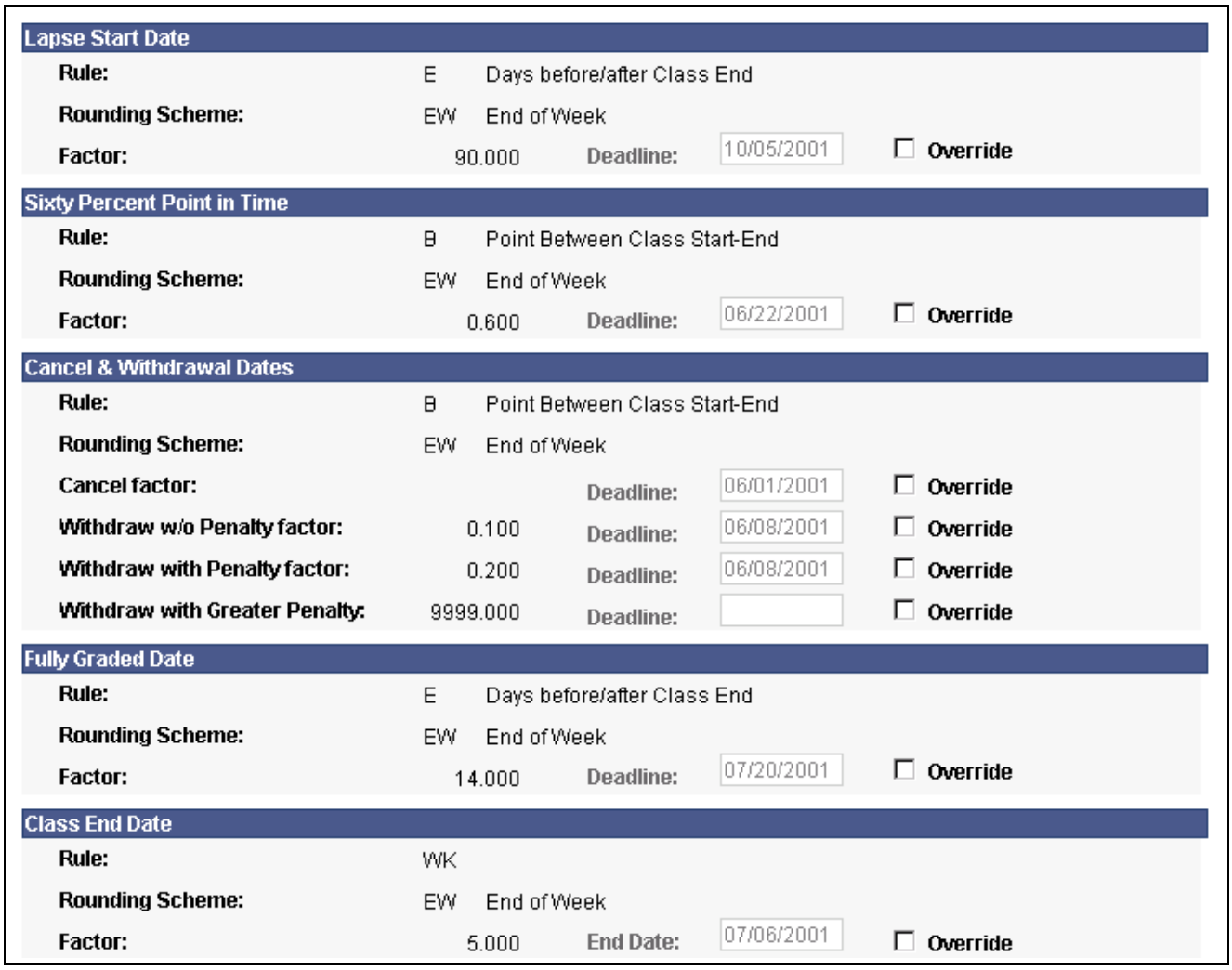
Page Name	Object Name	Navigation	Usage
Student OEE Enroll Data (student open entry/exit enrollment data)	OEE_ENRL_DATES	Records and Registration, Enroll Students, Student OEE Enrollment Data	View and override the academic calendar date deadlines that the Dynamic Class Dates process calculates for a student's OEE enrollment.

Viewing and Overriding Dynamic Academic Calendar Dates for OEE Enrollments

Access the Student OEE Enroll Data page.



Student OEE Enroll Data page (1 of 2)



Student OEE Enroll Data page (2 of 2)

The Dynamic Class Dates process calculates these deadlines based on the start date of the student's enrollment, which is specified at enrollment time. The Student OEE Enroll Data page displays the rule scheme, rounding scheme, and factor of each academic calendar date in the rule, as well as the calculated deadline.

Start Date Displays the date that the student started enrollment in the OEE class. This is the date that drives the Dynamic Class Dates process calculations for OEE enrollments.

Dynamic Class Data Rule Displays the rule that the Dynamic Class Dates process applied to this class when the student enrolled in the class. If you run the Dynamic Class Date process, which assigns a rule to the primary component of the OEE class, or if you assign a rule to the class on the Dynamic Class Dates page, then the enrollment engine uses that rule to calculate the deadlines for the landmark dates of the dynamic academic calendar. Otherwise, the enrollment engine uses the OEE dynamic date rule, which is specified on the Offerings page.

Deadline and **Override** The Dynamic Class Dates process displays the deadline for the corresponding landmark date, calculated according to the dynamic class date rule that you have applied to the class. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline.

See Also

Chapter 8, “Defining Dynamic Academic Calendars,” Creating Dynamic Class Date Rules, page 143

CHAPTER 9

Defining Programs, Plans, and Subplans

This chapter lists common elements and discusses how to:

- Define academic programs.
- Define academic plans.
- Define academic subplans.

Defining Academic Programs

To set up academic programs, use the Academic Program Table component (ACADEMIC_PROG_TBL).

This section provides an overview of academic programs and discusses how to:

- Describe academic programs.
- Set up defaults for academic programs.
- Set up academic standing parameters for academic programs.
- Set up honor and award parameters for academic programs.
- Establish academic organization ownership for academic programs.
- Set taxonomy and repeat checking options for academic programs.
- Define campuses and business units for academic programs.
- Define grade lapse rules for academic programs.
- Set up term enrollment limits for academic programs.
- Set up session enrollment limits for academic programs.
- Set up course count limits for academic programs.
- Set up dynamic date fields for academic programs.

Understanding Academic Programs

An *academic program* is the program to which a student applies and is admitted and from which the student graduates. For instance, at a 4-year liberal arts college, the academic program is a liberal arts undergraduate program. At a larger university with a college of fine arts, a school of engineering, and a college of arts and sciences, the academic programs correspond to those broad categories. At a graduate school, there can be a distinct academic program for every area of study, such as a doctoral program in mathematics and a doctoral program in molecular biology.

The academic program controls many factors at the student level. For example, the academic program controls the student's academic level, academic load, academic calendar, academic group for tuition calculation purposes, grading scheme, and admissions evaluation scheme. After you establish academic programs, you can create academic plans (which are subdivisions of academic programs) and academic subplans (which are subdivisions of academic plans).

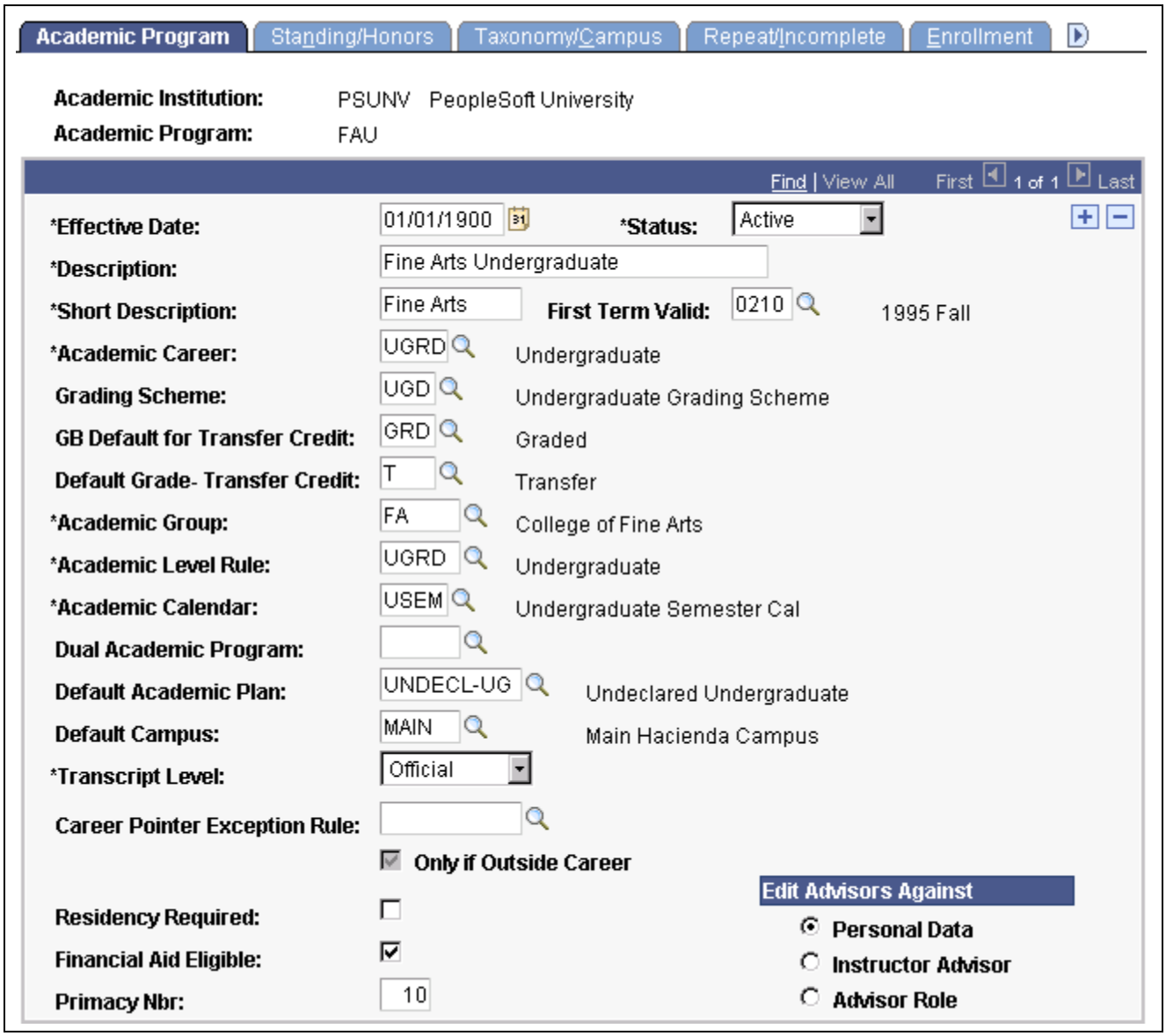
Pages Used to Define Academic Programs

Page Name	Object Name	Navigation	Usage
Academic Program	ACADEMIC_PROG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Academic Program	Describe every academic program at an academic institution and link each academic program to an academic career, grading scheme, academic group, academic level rule, and academic calendar.
Standing/Honors	ACAD_PROG_STDG_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Standing/Honors	Set up academic standing rules and parameters for academic programs. Set up honor and award rules and parameters for academic programs.
Taxonomy/Campus	ACAD_PROG_OWNR_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus	Establish academic organization owners of the academic program for reporting, analysis, and work distribution purposes. Also, link academic programs to Classification on International Programs (CIP) codes and Higher Education General Information Survey (HEGIS) codes. Define the home campus and business unit for academic programs and the valid campuses for financial aid, registration, and advisement.
Repeat/Incomplete	INCOMPLETE_GRADE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Repeat/Incomplete	Define grade lapse rules for academic programs. Each rule defines the grade to which incomplete grades lapse when you run reports. The rules also determine the related transcript notes that appear on a student's transcript. Set repeat checking controls at the academic program level and link repeat rules to academic programs.

Page Name	Object Name	Navigation	Usage
Enrollment	ENRL_LIMITS_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Enrollment	Set up class enrollment limits for students' academic programs, according to term categories.
Course	CRSE_COUNT_LIMITS	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Course	Set up students' enrollment limits for courses in a specified term category and session type within academic programs. Set up class enrollment limits for students' academic programs, according to sessions.
Dynamic Date	ACAD_PROG_DYN_DATE	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Dynamic Date	Set up dynamic date fields for a specific academic program.
Home Campus NLD	SSR_PROG_OWN_NLD	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Home Campus NLD	Set up home campus information for Dutch students.

Describing Academic Programs

Access the Academic Program page.



Academic Program page

For Online Analytical Processing (OLAP) purposes, it is important to carefully consider the codes that you assign to academic programs. When you design OLAP cubes for Cognos PowerPlay (a third-party application that is delivered with the PeopleSoft system), you should not have the same code for more than one dimension of the cube. For example, you should not use the same code, such as LAU, for both an academic career and an academic program.

First Term Valid Select the first term in which students can be admitted to the academic program. You cannot admit students to the academic program before the term that you specify. If you select term *0000,* you can admit students to the program for any term. When you convert data to the PeopleSoft system, be sure that you select a first valid term that is appropriate for the preexisting data of the academic program. This field is optional.

Academic Career Select the academic career to which the academic program belongs.

Grading Scheme — By default, displays the grading scheme of the academic career. Select a new value to override the default value. The grading scheme defines all valid grading bases of the academic program. The system applies the grading scheme to classes within the academic program. In addition, the system displays the grading scheme of the academic program in the equivalent fields throughout transfer credit processing whenever credit is transferred into that academic program. When the system converts transfer credit, it uses the grading basis of the lowest definable level.

GB Default for Transfer Credit (grading basis default for transfer credit) — By default, displays the transfer credit default grading basis of the academic career (as defined on the Academic Career Table page). Select a new value to override the default value. This grading basis appears on various pages for transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grading basis of the lowest definable level.

Default Grade – Transfer Credit — By default, displays the transfer credit default grade of the academic career. Select a new value to override the default value. This grade appears on various pages throughout transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grade of the lowest definable level.

Academic Group — Select the academic group to which the academic program belongs. PeopleSoft Enterprise Student Financials uses academic groups for tuition calculation. The academic group value does not indicate sole ownership of the academic program by the academic group. Define ownership for reporting and financial analysis purposes on the Taxonomy/Campus page of this component.

Academic Level Rule — Select the academic level rule for the academic program. This rule defines how the system calculates the academic level for students who are in the academic program.

Academic Calendar — Select the academic calendar for the academic program. The system uses the academic calendar that you select to determine many of the important dates associated with the academic program.

Dual Academic Program — Select the second academic program, if the academic program is a joint program (such as J.D./M.B.A.). This enables PeopleSoft Enterprise Recruiting and Admissions to evaluate and accept students into both academic programs with one application.

Default Academic Plan — Select a default academic plan for the academic program. The system uses the value that you select as the default academic plan for new applicants to the academic program. The selection appears on the Quick Admit, Recruit Prospective Students, and Application Entry pages.

Default Campus — Select the default campus for the academic program. The value that you select appears on the Quick Admit, Create Prospects, and Application components for new applicants to this academic program. Define campuses on the Campus Table page.

Transcript Level — Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are *Not Print, Official, Unofficial, Stdnt Life* (student life), and *Degr Prog* (degree progress).

Career Pointer Exception Rule — Select the career pointer exception rule for the academic program. If the academic program does not have any career exceptions—that is, if enrollments

in other careers' courses follow the rules on the Academic Career Pointers page—leave this field empty.

Only if Outside Career Select to use the career pointer exception rules only against class enrollments that are outside the academic career associated with the academic program. Clear this check box to use the career pointer exception rules against all class enrollments in the academic program.

Residency Required Select to require residency data for students in the academic program. When you attempt to activate a student into a term, the Term Activation process determines whether a student's academic program requires that the student have residency data in the system. If so and the student does not have residency data in the system, the Term Activation process does not activate the student for the term. This blocks the student from class enrollment and tuition calculation.

The value of this check box appears by default, according to the setting of the Residency Required field on the Institution 1 page for the academic institution to which the academic program belongs.

Financial Aid Eligible Select to indicate that students in the academic program are eligible for financial aid. This check box works in conjunction with the Enforce FA Eligibility (enforce financial aid eligibility) check box on the Statistics Period Type page. The Consolidate Academic Statistics process uses these check boxes to determine which students to include in calculations. For example, if the academic program belongs to a continuing education or nondegree academic career and you want to exclude students within the academic program from the process calculations, clear the Financial Aid Eligible check box on this page and select the Enforce FA Eligibility check box on the Statistics Period Type page.

Primacy Nbr (primacy number) Enter the primacy number for the academic program. The system uses this number as a key to determine a student's primary academic program when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic programs at the same time. The lowest number takes precedence.

Note. It is recommended that you coordinate the numbering with Financial Aid to avoid conflicts.

Edit Advisors Against Select the view that the system uses when prompting you to assign an advisor for a student in the academic program. Assign advisors to students on the Student Advisor page. If you are defining a new academic program, the system displays the value from the corresponding field on the Academic Career Table page. The option that you select appears by default on the Student Milestone page and the Student Advisor page. Options are:

- *Personal Data:* Prompts against all people with a personal data record in the PeopleSoft system.
- *Instructor Advisor:* Prompts against all people defined as instructors and advisors on the Instructor/Advisor Table page, as defined for the academic program.
- *Advisor Role:* Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for the academic program.

See Also

Chapter 8, “Defining Dynamic Academic Calendars,” page 139

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Consolidating and Reporting Academic Statistics,” Building OLAP Cubes for Records Analysis

Setting Up Academic Standing Parameters for Academic Programs

Access the Standing/Honors page.

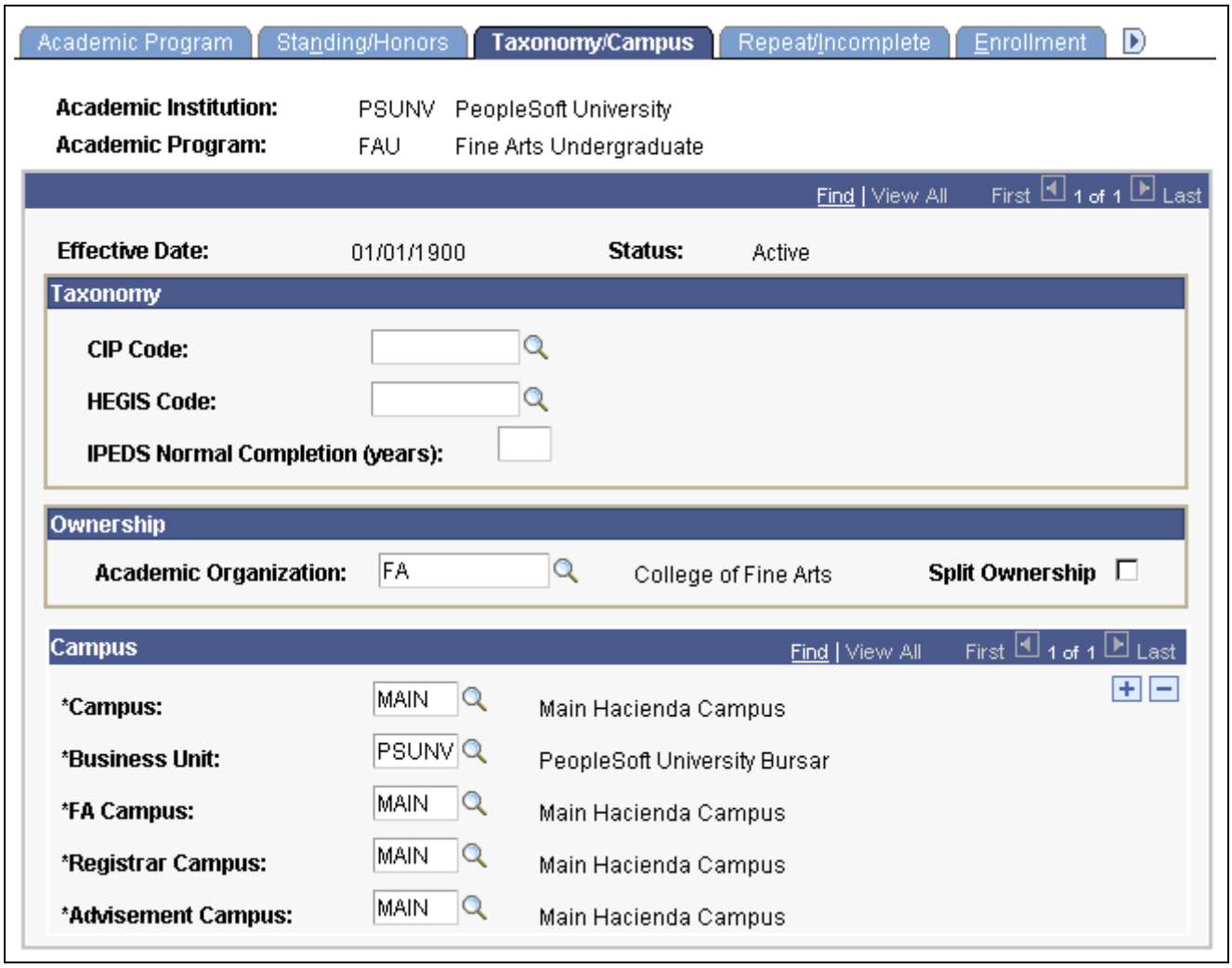
See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Preparing to Track Student Data,” Linking Academic Standing, Honors, and Awards Rules to Academic Programs

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Preparing to Track Student Data,” Linking Honor Award Rules to Academic Programs

Setting Taxonomy, Academic Organization Ownership, and Campus Information for Academic Programs

Access the Taxonomy/Campus page.



Taxonomy/Campus page

Taxonomy

CIP Code (Classification of Instructional Programs code) Select the CIP code for this academic program.

HEGIS Code (Higher Education General Information Survey code) Select the HEGIS code for this academic program.

IPEDS Normal Completion (years) (Integrated Postsecondary Education Data System normal completion years) Enter the number of years it normally takes a student to complete this academic program. The Completions report for IPEDS uses this information. The Completions report is one of the OLAP cubes delivered with Student Records.

Ownership

Academic Organization Select the academic organization that offers courses in the academic program. Any academic organization entered here should also have a detail node

	associated with it for this academic program on the academic organization tree. Define academic organizations on the academic organization tree.
Split Ownership	Select to designate multiple academic organization owners for this academic program. If you select this option, the lower Academic Organization field and the Percent Owned field become available.

Campus

Campus	Select a primary campus for the academic program.
Business Unit	Select the business unit (for bursar purposes) for the academic program. Define business unit values on the SF Business Unit Table page.
FA Campus (financial aid campus)	Select the campus responsible for administering the academic program's financial aid. The system displays values from the Campus Table page.
Registrar Campus	Select the campus responsible for student records within the academic program. The system displays values from the Campus Table page.
Advisement Campus	Select the campus responsible for student advising within the academic program. The system displays values from the Campus Table page.

Note. You can add multiple campuses to any field on this page by inserting a new row.

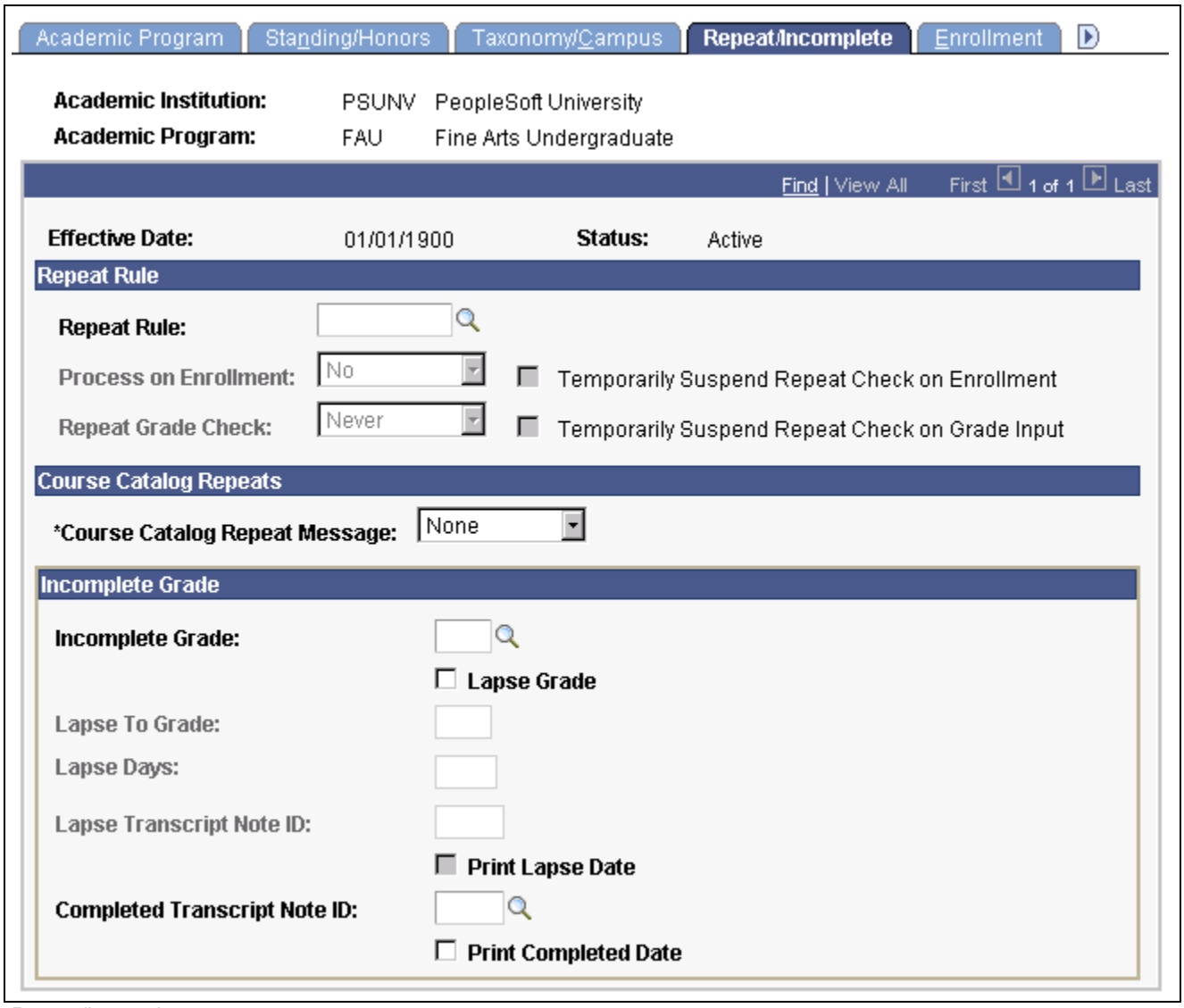
See Also

Chapter 11, "Securing Your Academic Institution," Securing Academic Organizations, page 212

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Defining Repeating Rules and Grade Lapse Rules for Academic Programs

Access the Repeat/Incomplete page.



Repeat/Incomplete page

Repeat Rule

Repeat Rule

Select a repeat rule for this academic program. The system prompts you with valid choices according to the academic career to which this academic program belongs. Repeat rules contain the conditions that define repeat checking policies. For example, the repeat rule can specify how many times a student can take courses given certain conditions, such as the grades that the student earns. Settings at the academic career level are defaults for all of the academic programs within this academic career wherein a repeat rule is not attached to the academic program. Repeat rules must be assigned to an academic career for the Repeat Checking process to function at grade input.

Process on Enrollment

Use this field to activate the Repeat Checking process at enrollment time for this academic program. The choices are *Yes* and *No*.

Select *Yes* if you want the Repeat Checking process to run during enrollment for this academic program. This is a front-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The

process is front-end because it checks for repeats at enrollment time, rather than when you post grades. You can run the Repeat Checking process for the entire academic institution, for students in particular academic careers within the academic institution, and for students in primary academic programs within academic careers. This field is unavailable if *No* is selected at the academic career or academic institution levels.

Select *No* if you do not want the Repeat Checking process to run during enrollment processing for students in this academic program. This field is unavailable when you select *No* at the academic career or academic institution level.

Repeat Grade Check

Use this field to activate or deactivate the Repeat Checking process upon grade submission on the Enrollment Request page or the Quick Enrollment page for this academic program. Select from the following choices.

All Crse: Select this option if you want the Repeat Checking process to run upon grade submission on the Enrollment Request page for this academic program. This is a back-end process that checks repeats, based on repeat rules that you set up in the Repeat Rule component. The process is back-end because it checks for repeats when you post grades, after the student has already completed the class, rather than at enrollment time. You can run the Repeat Checking process for the entire academic institution, for academic careers within the academic institution, and for academic programs within academic careers. This field is unavailable if *Never* is selected at the academic career or academic institution levels.

Never: Select this option if you do not want the Repeat Checking process to run upon grade submission on the Enrollment Request page. This field is unavailable when you select *Never* at the academic career or academic institution level.

Only Rep (only repeats): Select if you want to run the process against all class enrollments on a student's enrollment record (STDNT_ENRL table) where the repeat candidate field is set to Y. The only time that the system does not set the repeat candidate field to Y is for class enrollments entered through the Enrollment component or for classes where the course is defined as an allowable repeat through the Course Catalog component.

Temporarily Suspend Repeat Check on Enrollment (temporarily suspend repeat checking on enrollment)

Select to temporarily suspend the Repeat Checking process at enrollment time for students in this academic program. This check box enables you to temporarily suspend repeat checking during peak enrollment periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on enrollment. Use this functionality sparingly, because students attempting to repeat a class are not warned about a possible illegal repeat.

Temporarily Suspend Repeat Check on Grade Input (temporarily suspend repeat checking on grade input)

Select to temporarily suspend the Repeat Checking process during grade input for this academic program. This check box enables you to temporarily suspend repeat checking during peak grading periods, when the Repeat Checking process might seriously impair performance. After the peak period has passed, clear this check box to re-enable the Repeat Checking process on grade input. Use this functionality sparingly, because the system does not check for repeats, so you will not know if any repeat rules apply to students until you run the Repeat Checking process in batch.

Course Catalog Repeats

Course Catalog Repeat Message

Select from the following choices the message type the system displays during enrollment when the Allowable Repeats process detects that the student has previously taken the course.

Error: Issues an error and prevents the student from enrolling in the repeated class.

Warning: Issues a warning that the repeatable limit as established on the course catalog has been exceeded. The student is still able to enroll in the class.

None: Issues no warning or error and the student is still able to enroll in the class.

The Allowable Repeats process runs at class enrollment time and looks at settings at the course catalog level to see whether a course can be repeated. This process does not affect student statistics; it is used only to determine whether a student can repeat a course. When the completions maximum or units maximum has been exceeded, the system issues enrollment messages, depending on the message type selected and assuming that the Course Catalog Repeats functionality is in effect.

The system renders the Course Catalog Repeat Message field unavailable when you select *Yes* in the Process on Enrollment field. The system renders the field unavailable because when you run the Repeat Checking on Enrollment process, the Allowable Repeats process does not issue a message when a repeated course is in violation of the course catalog repeat maximums. The Repeat Checking process analyzes the student's enrollment records for repeated courses and issues warnings only after the Allowable Repeats process identifies an enrollment that exceeds the completions maximum or units maximum set on the Catalog Data page of the Course Catalog component.

Incomplete Grade

This page allows you to define grade lapse rules for academic programs. Enter all of the grade lapse rules necessary to instruct the system how students' incomplete grades should lapse when you run the Grade Lapse report process and what transcript notes, if any, the system displays on a student's transcript.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Grading Students," Running the Grade Lapse Process

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Repeat Checking," Setting Up Repeat Checking for Academic Programs

Setting Up Term Enrollment Limits for Academic Programs

Access the Enrollment page.

Enrollment page

When checking enrollment unit limits, the enrollment engine first checks the academic program's term limits (as defined here). If the student meets the enrollment unit limits for the term, the enrollment engine checks the enrollment limits for the session (as defined on the Session page of the Academic Program Table component), if units limits have been defined for the session. If the student meets the enrollment limit requirements for the session (or if no limits were defined for the session), the enrollment engine checks the enrollment unit limits for the appointment, if the open enrollment date has not been reached. Appointment enrollment unit limits only apply prior to the open enrollment period.

The full-time limits and part-time enrollment limits that you set on this page apply to students approved for a full-time or part-time academic load in the specified academic program and term category.

Term Category Select the term category for the academic program's default term enrollment limits. You can modify these translate values.

Note. You link term category values to actual terms and academic careers on the Term Table page.

Check Min Before Open Enrollment (check minimum before open enrollment)

Select to enable the enrollment engine to verify enrollment requests against the minimum unit amounts set *before* the open enrollment date. Set the open enrollment date on the Session Table page.

Full Time Max Total Units (full-time maximum total units) and **Part Time Max Total Units** (part-time maximum total units)

Enter the maximum number of units that full-time and part-time students can have for the specified term category within the academic program.

If you select the Include Wait List in Total check box on this page, the enrollment engine calculates the student's total units by adding the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) or *W* (waiting). If you clear the check box, the enrollment engine includes only the units taken for rows where the student enrollment status equals *E*.

Full Time Min Total Units (full-time minimum total units) and **Part Time Min Total Units** (part-time minimum total units)

Enter the minimum number of units that full-time and part-time students can have for the specified term category within the academic program. The enrollment engine references this value only when a student attempts to drop a class or make a unit adjustment for a class. To calculate the student's total units, the enrollment engine adds the units taken (UNT_TAKEN) for rows in the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment).

Full Time Max No GPA Units (full-time maximum non-grade point average units) and **Part Time Max No GPA Units** (part-time maximum non-grade point average units)

Enter the maximum number of units that full-time and part-time students can have with a non-GPA grading basis for the specified term category within the academic program. This number includes the maximum audit units.

To calculate the student's total non-GPA units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the include in GPA (INCLUDE_IN_GPA) flag equals *N* (no).

Full Time Max Audit Units (full-time maximum audit units) and **Part Time Max Audit Units** (part-time maximum audit units)

Enter the maximum number of non-GPA units that full-time and part-time students can have with an audit grading basis for the specified term category within this academic program. This number is part of the maximum non-GPA units.

To calculate the student's total audit units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the audit grade basis (AUDIT_GRADE_BASIS) flag equals *Y* (yes).

Full Time Max Wait List Units (full-time maximum wait list units) and **Part Time Max Wait List Units** (part-time maximum wait list units)

Enter the maximum number of wait list units that full-time and part-time students can have in the specified term category within the academic program.

Wait list units are any combination of graded, non-GPA, and audit units. To calculate the student's total wait list units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *W* (waiting).

Full Time Projected Bill Units and **Part Time Projected Bill Units**

Enter the number of units that the system uses to calculate projected tuition for billing before the completion of enrollment for full-time and part-time students in the term category within the academic program.

Bill for Wait List Units Select to include wait list units in tuition calculations.

Include Wait List in Total Select to have the enrollment engine include wait list units when calculating a student's full-time and part-time maximum total units. Clear this check box to enable a student to have up to the maximum wait list units regardless of maximum total units.

Note. This check box affects only full-time and part-time maximum total units for the term. It *does not* affect session or appointment enrollment limits.

Examples of Term Enrollment Limits

Suppose that the Liberal Arts Undergraduate (LAU) program at PeopleSoft University (PSUNV) limits full-time student enrollment into regular terms, as shown in this table:

Field	Value
Full Time Max Total Units	*18*
Full Time Max No GPA Units	*6*
Full Time Max Audit Units	*3*
Full Time Max Wait List Units	*6*
Include Wait List in Total	*Y*

A full-time student can enroll in a maximum of 18 units for the term. Of these 18 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units. Suppose that a student has the maximum of six wait list units and has yet to enroll in any units. Because the Include Wait List in Total check box is selected, the student can enroll in 12 additional units before reaching the maximum total units. Of these 12 units, six can be non-GPA units. Of the six non-GPA units, three can be audit units.

The Fine Arts Undergraduate (FAU) program at PSUNV limits part-time enrollment into these regular terms:

Field	Value
Part Time Max Total Units	*11*
Part Time Max No GPA Units	*3*
Part Time Max Audit Units	*3*
Part Time Max Wait List Units	*6*
Include Wait List in Total	*N*

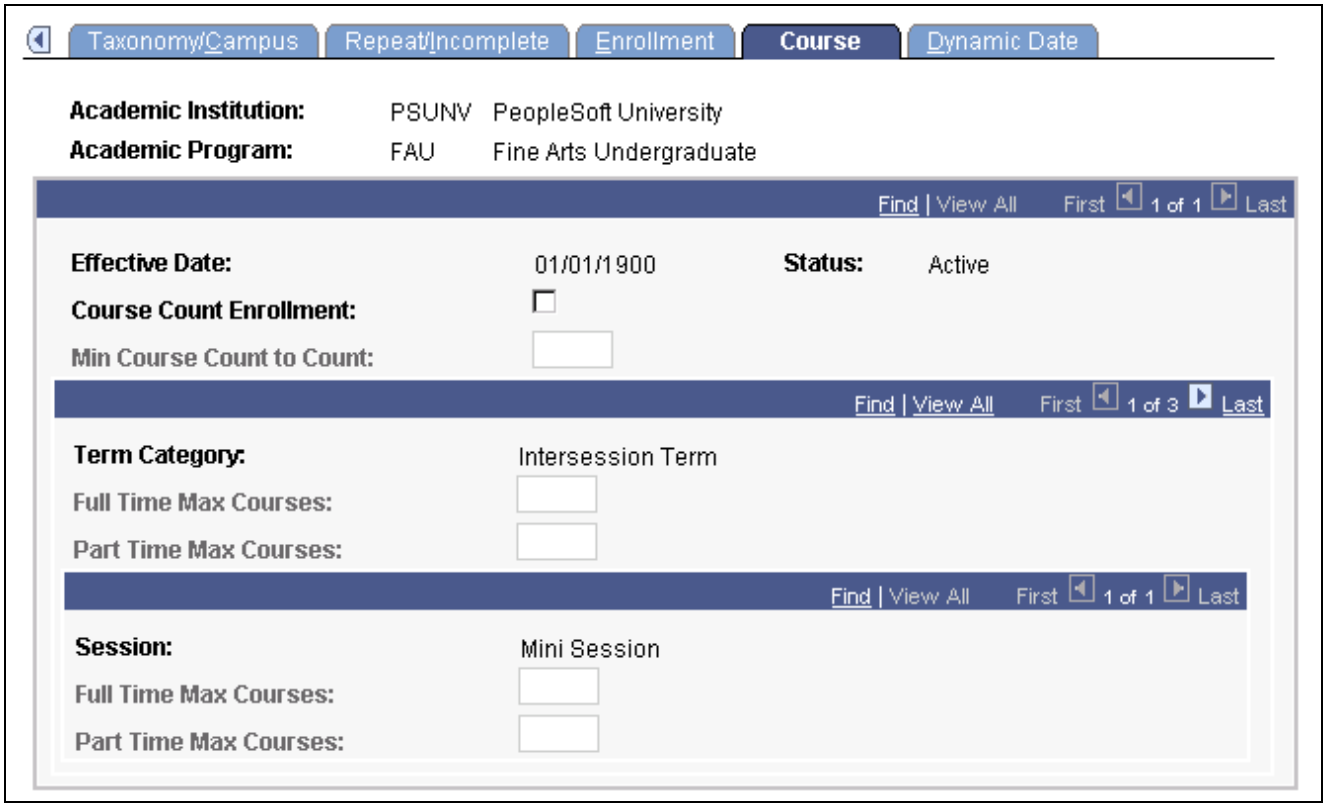
A part-time student can enroll in a maximum of 11 units for the term. Of these 11 units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. Suppose that a student enrolls in eight units. Because the Include Wait List in Total check box is cleared, the student can enroll in an additional three units maximum. Of these three units, three can be non-GPA units. Of the three non-GPA units, three can be audit units. The student can also add six additional wait list units.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Managing Enrollment and Validation Appointments"

Setting Up Course Count Limits for Academic Programs

Access the Course page.



Course page

The enrollment engine uses these enrollment limits in addition to the unit limits when determining whether a student can enroll in a course. Define course count enrollment limits for specific course offerings on the Catalog Data page of the Course Catalog component.

Course Count Enrollment — Select to activate course count processing for class enrollment in the academic program. If you select the Only Use Term Unit Limits check box on the Session page, the session type fields are unavailable. Otherwise, all fields on this page are available.

Min Course Count to Count (minimum course count to count) — If applicable, enter the minimum course count value that a course must be worth to count towards the total full-time and part-time maximum course counts. For example, if you indicate that a course must meet a minimum course count value of 0.50, then a course's count value must be greater than or equal to 0.50 to count towards the full-time maximum course and part-time maximum course limits.

Full Time Max Courses (full-time maximum courses (upper)) — Enter the full-time maximum course counts for students enrolling in classes within the specified term category of the academic program.

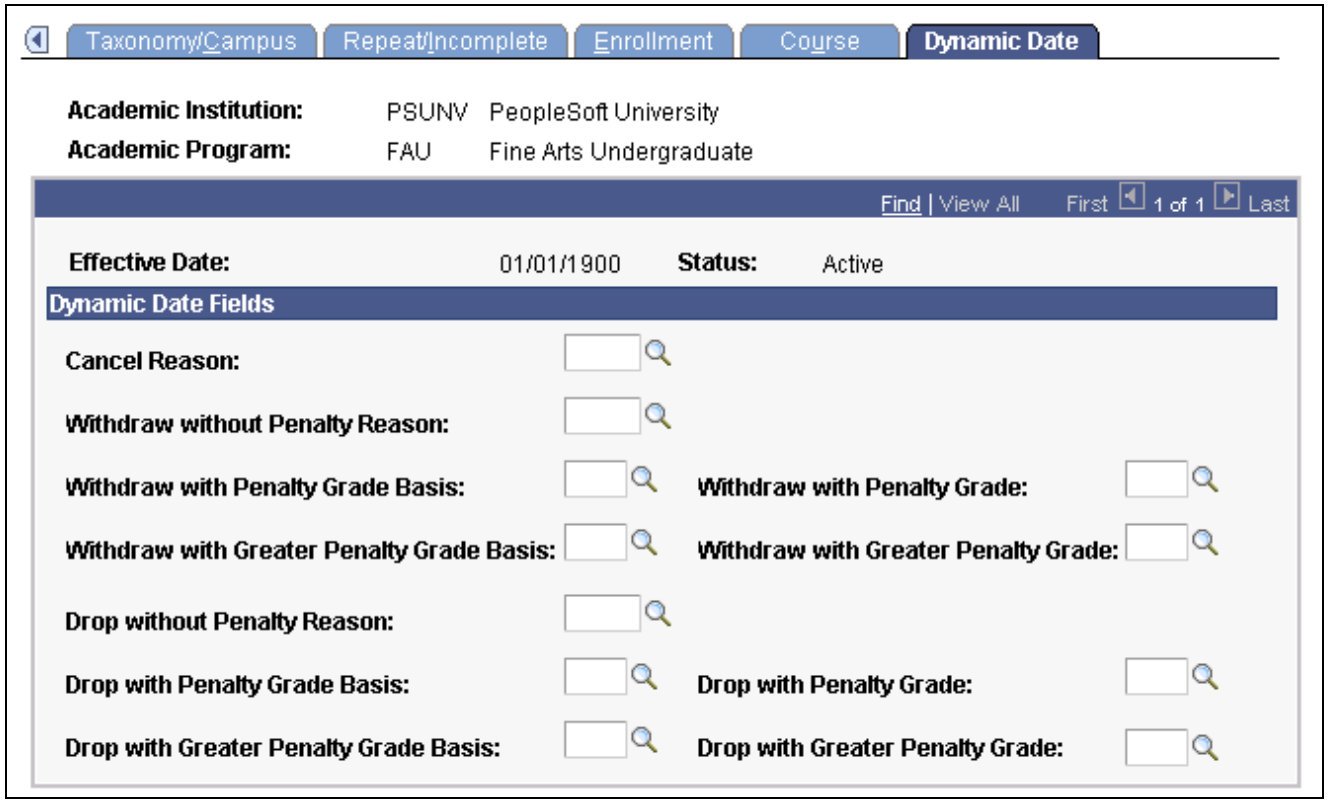
Part Time Max Courses (part-time maximum courses (upper)) Enter the part-time maximum course counts for students enrolling in classes within the specified term category of the academic program. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

Full Time Max Courses (full-time maximum courses (lower)) If you set specific session unit limits for this term category on the Session page, the Full Time Max Courses field and Part Time Max Courses field become available. Enter the full-time maximum course counts for students enrolling in classes within the session type of the specified term category.

Part Time Max Courses (part-time maximum courses (lower)) Enter the part-time maximum course counts for students enrolling in classes within the session type of the specified term category. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

Setting Up Dynamic Date Fields for Academic Programs

Access the Dynamic Date page.



Dynamic Date page

Note. For students within a specified academic program to be able to drop or withdraw from open entry/exit classes, you must define the values on this page.

This page is available only if you enable the use of the Dynamic Class Dates features on the Academic Career Table 2 page. When you apply a dynamic class date rule to a class or OEE enrollment, the system uses the student's primary academic program to control the reasons and penalties when a student cancels, withdraws from, or drops a class. These reasons and penalties relate to the corresponding landmark date deadlines on the dynamically calculated academic calendars. They apply to students according to the academic program and according to the dynamic class date rule of a class. You set up the dynamic class date rules on the Dynamic Class Dates page. You view and override the calculated deadlines for the regular dynamic class date rules on the Dynamic Data page and for OEE dynamic date rules on the Student OEE Enroll (student open entry/exit enrollment) page.

When processing drops or withdrawals for dynamically dated classes during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you have not defined penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define for the student's primary academic program.

Cancel Reason Select the enrollment action reason that applies to a student's enrollment record when the student cancels a dynamically dated class on or before the cancel-date deadline. You can modify these translate values.

Withdraw without Penalty Reason Select the enrollment action reason that applies to a student's enrollment record when the student withdraws from or drops a dynamically dated class after the cancel deadline but on or before the withdraw-without-penalty deadline. You can modify these translate values.

Withdraw with Penalty Grade Basis Select the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. Set up grading basis values on the Grading Scheme Table page. The grading basis that you select determines the grades available in the Withdraw With Penalty Grade field.

Withdraw with Penalty Grade Select the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline.

Withdraw with Greater Penalty Grade Basis Select the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Withdraw With Greater Penalty Grade field.

Withdraw with Greater Penalty Grade Select the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline.

Drop without Penalty Reason Select the enrollment action reason that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-and-delete deadline but on or before the drop-and-retain-record deadline. You can modify these translate values.

Drop with Penalty Grade Basis Select the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline. The grading basis that you select determines the grades available in the Drop With Penalty Grade field.

Drop with Penalty Grade Select the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline.

Drop with Greater Penalty Grade Basis Select the grading basis that determines a student's grade when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Drop With Severe Penalty Grade field.

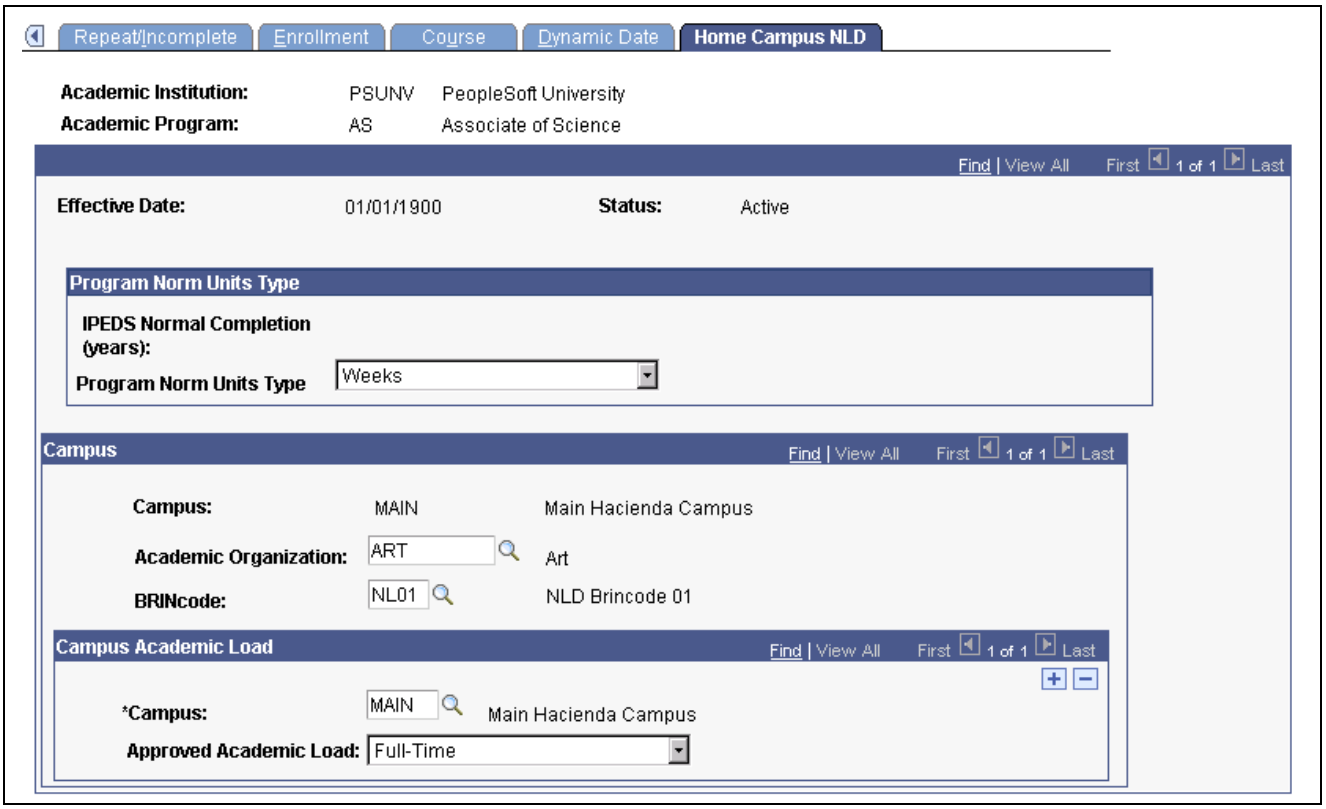
Drop with Severe Penalty Grade Select the grade that applies to a student's enrollment record when the student drops a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Grading," Defining Grading Schemes

(NLD) Setting Up Home Campus Information

Access the Home Campus NLD page.



Home Campus NLD page

BRINcode Enter a BRINcode, which is defined by the Dutch Ministry of Higher Education and is used in CBAP.

Defining Academic Plans

To set up academic plans, use the Academic Plan Table component (ACADEMIC_PLAN_TBL).

This section provides an overview of academic plans and discusses how to:

- Describe academic plans.
- Set up print options.
- Set up taxonomy.
- Establish academic organization ownership.

Understanding Academic Plans

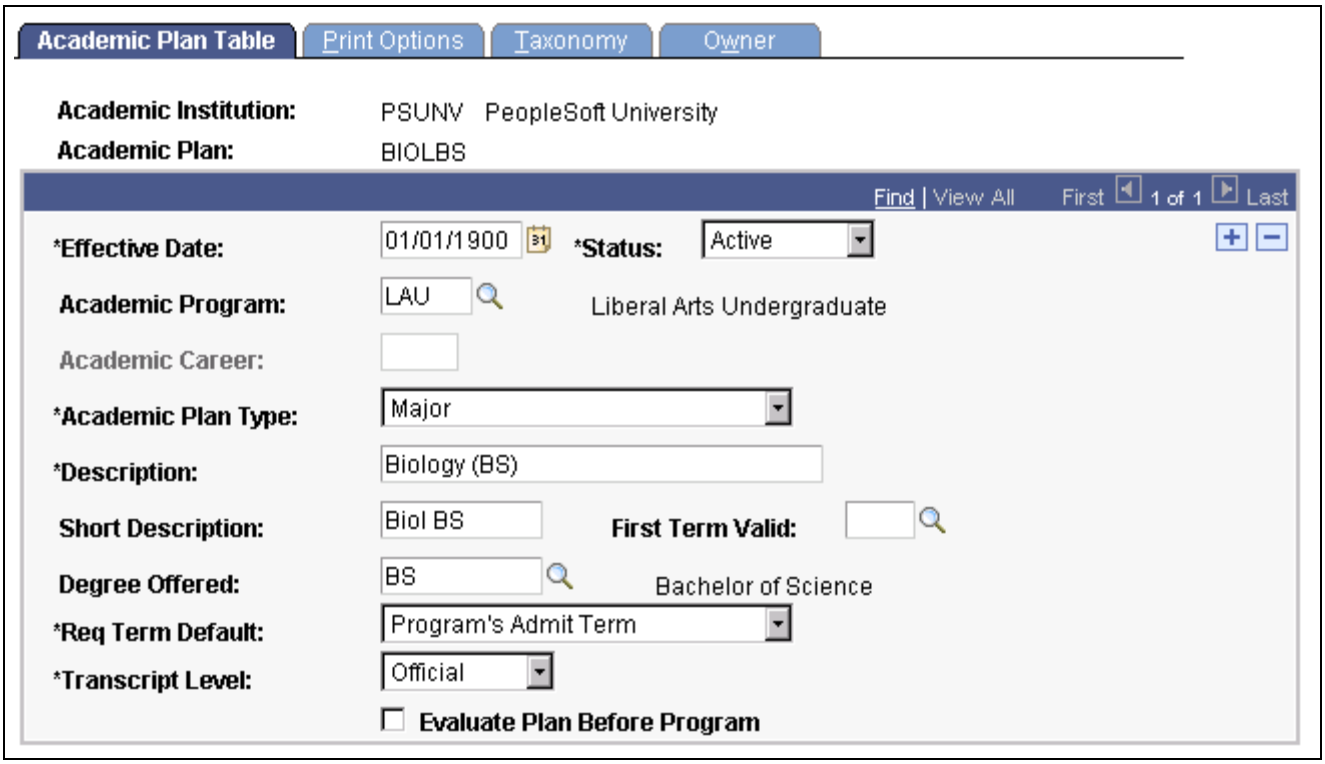
An academic plan is an area of study—such as a major, minor, or specialization—that is within an academic program *or* within an academic career. A student can earn only one degree for a single academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree, or you must create a combined degree, such as B.A./B.S. You can set up academic plans to award degrees, indicating completion of the academic program, or to award intermediate certificates or degrees.

Pages Used to Define Academic Plans

Page Name	Object Name	Navigation	Usage
Academic Plan Table	ACADEMIC_PLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table	Describe academic plans, tie academic plans to an academic program or academic career, and specify the degree offered and other details.
Print Options	ACAD_PLAN_PRNT_OPT	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Print Options	Set up diploma and transcript printing options and text for academic plans.
Taxonomy	ACAD_PLAN_TAXONOMY	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Taxonomy	Set up academic plan taxonomy, including CIP codes, HEGIS codes, and fields of study for academic plans.
Owner	ACAD_PLAN_OWNER	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Owner	Establish academic organization owners of the academic plan for reporting, analysis, and work distribution purposes.

Describing Academic Plans

Access the Academic Plan Table page.



Academic Plan Table page

Warning! If you change the academic program or academic career to which an academic plan belongs, you must first deactivate the academic plan, by inserting a new row and selecting a status of *inactive.* Then you must add another new row to tie the academic plan to a different academic program or academic career. This ensures proper functionality of academic plan prompts throughout the system.

Academic Program Select the academic program *or* an academic career to which this academic plan belongs. To require that a student be admitted to a specific academic program before declaring the academic plan, select an academic program to link to this academic plan.

Academic Career Select an academic career to link to the academic plan if you want students in any academic career to be able to declare the academic plan. For example, an institution might enable all undergraduates to declare computer science as a major (academic plan), regardless of whether students are in a liberal arts program or an engineering program.

Academic Plan Type Select a type for this academic plan, such as *Major, Minor,* or *Concentration.* You can modify these translate values.

First Term Valid Select the first term in which students can be admitted to the academic plan. You cannot admit students to the academic plan before the term that you specify. If you select term *0000,* you can admit students to the plan for any term. When you convert data to the PeopleSoft system, be sure that you select a first valid term that is appropriate for the preexisting data for each academic plan. This field is optional.

Note. Students can change this plan when their admit term is prior to this term as long as the effective date of the change is greater than or equal to the start date of this term.

Degree Offered Select the degree offered for completion of the academic plan. If the institution offers dual degrees, you must establish separate academic plans for each degree or create a combined degree, such as B.A./B.S. The system creates degree records according to the definition of the academic plan. Therefore, if a student graduates with dual degrees and the degrees are the same—such as an english B.A. and psychology B.A.—the system creates one degree record. However, if a student graduates with dual degrees and the degrees are different—such as an english B.A. and biology B.S.—the system creates two degree records, one for each degree.

Req Term Default (requirement term default) Select the default term for which the system begins accumulating requirements for the academic plan. You can override the default value for individual students on the Student Plan page. Modification to these translate values requires significant programming effort.

Note. Set a default here so that when you analyze completion requirements for an academic plan, you know which set of requirements to use. Requirements can change over time.

Transcript Level Select a transcript level to determine the types of transcripts on which the system includes the specified data. Values are *Not Print, Official, Unofficial, Stdnt Life* (student life), and *Degr Prog* (degree progress).

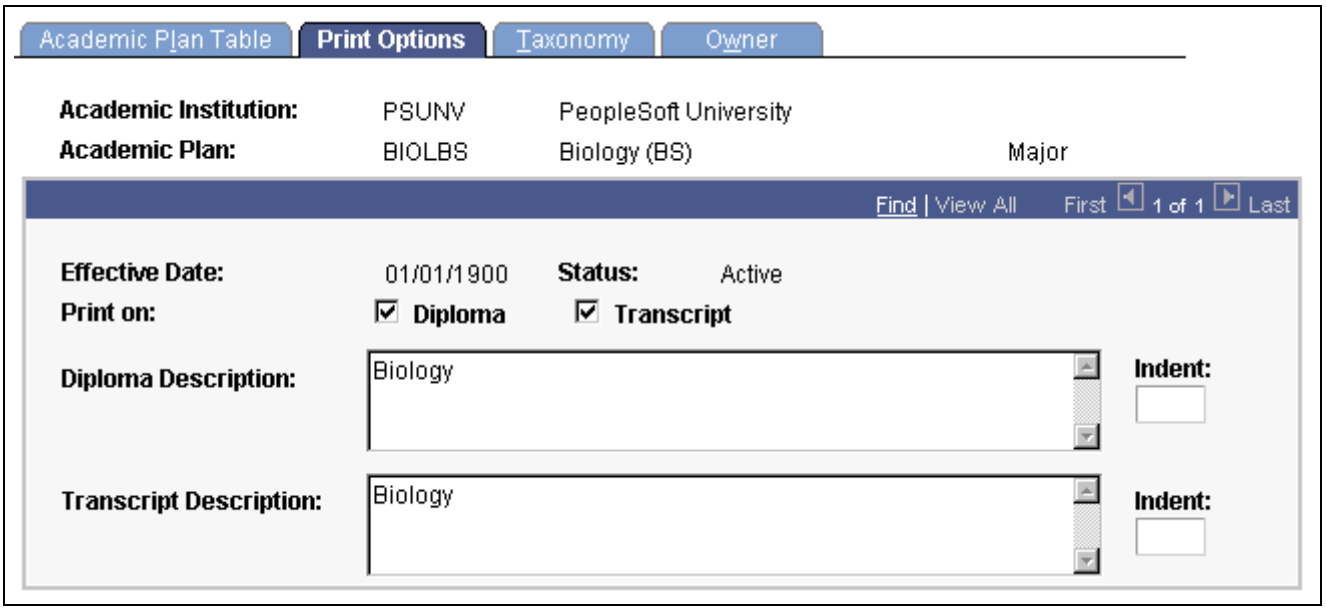
Evaluate Plan Before Program Select to alter reporting sequences. This check box is a feature of PeopleSoft Enterprise Academic Advisement.

See Also

PeopleSoft Enterprise Academic Advisement 8.9 PeopleBook, "Setting Up Academic Requirement Groups," Changes to Academic Structure Processing

Setting Up Print Options

Access the Print Options page.



Print Options page

Diploma Select to print a description on the diplomas for students who complete the academic plan. The Diploma Description field becomes available.

Transcript Select to print a description on the transcripts for students with the academic plan. The Transcript Description field becomes available.

Diploma Description Enter the description of the academic plan. This description appears on the diplomas for students who complete the academic plan. The PeopleSoft system currently does not provide a process to print diplomas.

Transcript Description Enter the description of the academic plan. This description appears on the transcripts for students with this academic plan. You can override this text when you prepare students' transcripts.

Indent Specify the number of spaces that you want to indent the related description on the printed document.

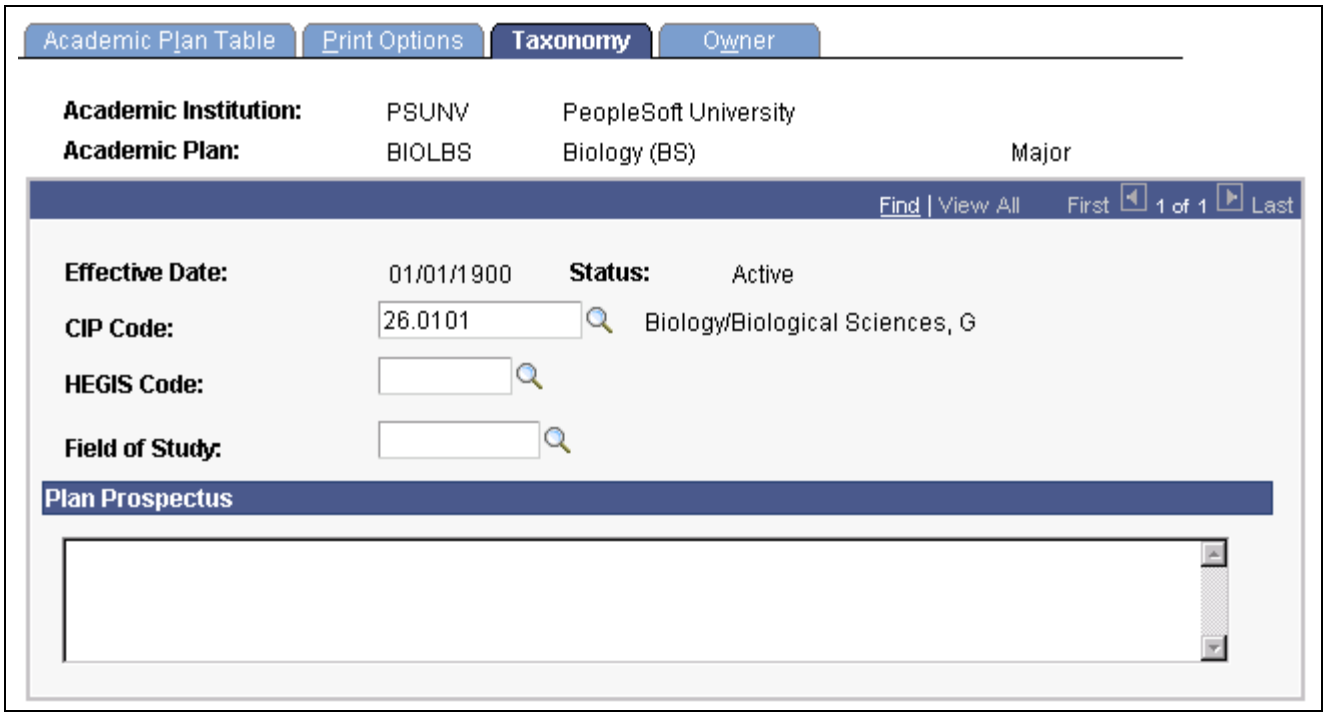
See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Transcripts"

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts"

Setting Up Taxonomy

Access the Taxonomy page.



Taxonomy page

CIP Code (Classification of Institutional Programs code) Select the CIP code for this academic plan. CIP code values are delivered with the system as translate values. You can modify CIP codes on the CIP Code Table page.

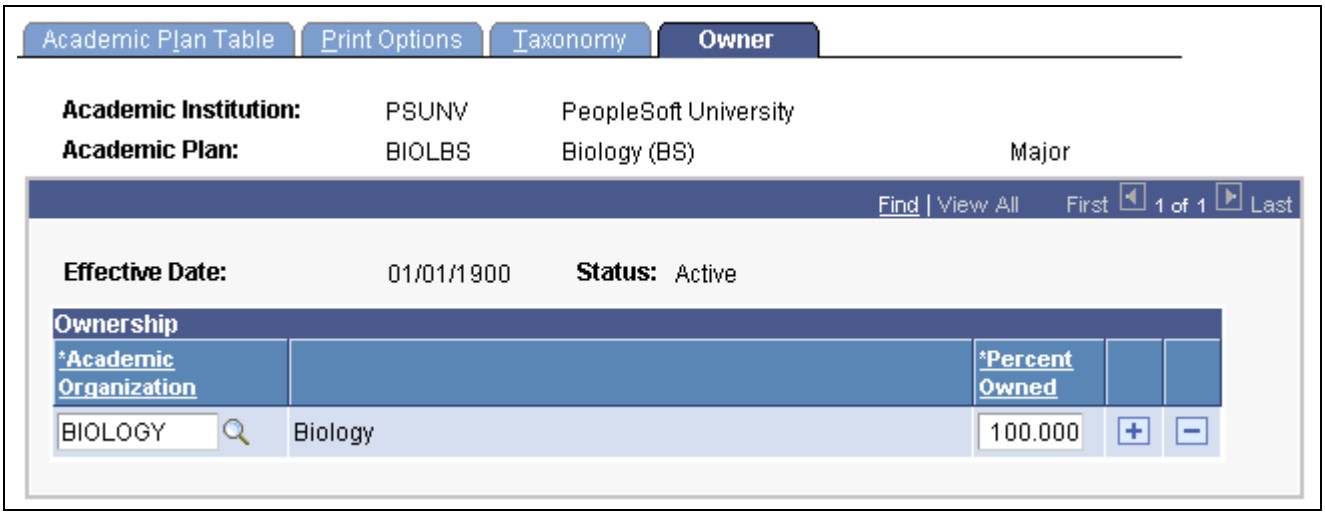
HEGIS Code (Higher Education General Information Survey code) Select the HEGIS code for this academic plan. HEGIS codes are delivered with the system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

Field of Study Select a field of study for the academic plan.

Plan Prospectus Enter descriptions of the academic plan, such as information about special programs, faculty, and associated societies. You can then create a separate advisement report querying this field and print the report for brochures and other documentation.

Establishing Academic Organization Ownership

Access the Owner page.



Owner page

Academic Organization (lower) Select the academic organization that owns this academic plan. Define academic organization values on the academic organization tree in PeopleSoft Tree Manager. Modify them in the Academic Organization Table component.

Percent Owned Enter the percentage of the academic plan for which the academic organization is responsible. Ownership of the academic plan can be split between academic organizations, but the total percentage must equal *100*.

See Also

Chapter 11, "Securing Your Academic Institution," Securing Academic Organizations, page 212

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Defining Academic Subplans

To set up academic subplans, use the Academic SubPlan Table component (ACAD_SUBPLN_TBL).

This section provides an overview of academic subplans and discusses how to:

- Describe academic subplans.
- Set up taxonomy.

Understanding Academic Subplans

Academic subplans are areas of further specialization within academic plans, and they are tied to academic plans. You can define an academic subplan as a minor, a concentration, or a specialization. For example, a major in English might have additional work associated with it so that students can concentrate in creative writing. Similarly, a Ph.D. program in mathematics might have specializations in computer science and physics.

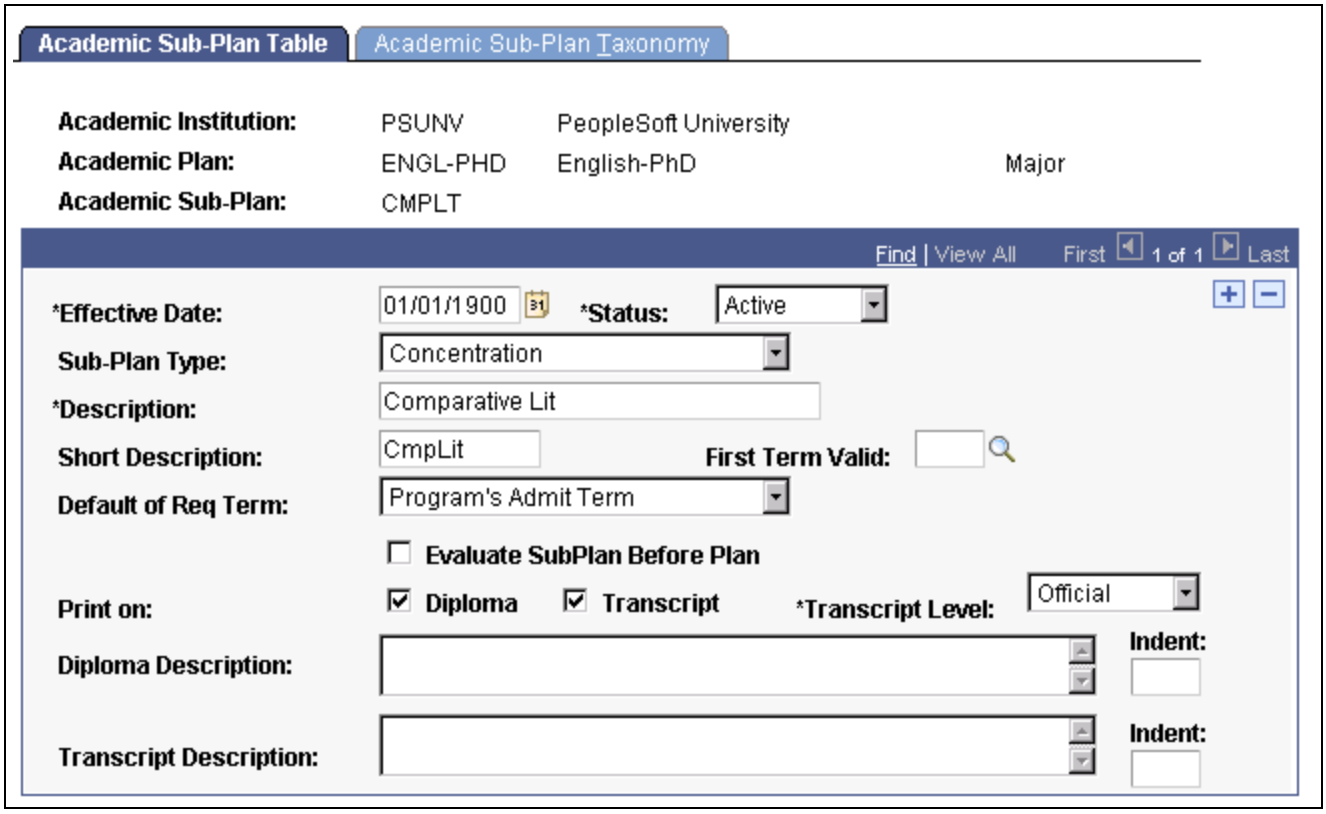
Determining whether to create academic subplans as minors is dictated by the academic plan and the academic structure. For instance, if students can minor in creative writing only if they major in English, then you would define the creative writing minor as a subplan and link it to the English academic plan. If students can minor in creative writing regardless of their major, then you would define creative writing as a minor on the Academic Plan Table page.

Pages Used to Define Academic Subplans

Page Name	Object Name	Navigation	Usage
Academic Sub-Plan Table	ACAD_SUBPLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table	Describe academic subplans, and establish diploma and transcript printing options and text for academic subplans.
Academic Sub-Plan Taxonomy	ACAD_SUBPLAN_TXNMY	Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Academic Sub-Plan Taxonomy	Set up taxonomy for academic subplans, including CIP codes and HEGIS codes for academic plans.

Describing Academic Subplans

Access the Academic Sub-Plan Table page.



Academic Sub-Plan Table page

Sub-Plan Type Select a type for the academic subplan. You can modify these translate values.

First Term Valid Select the first term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan before the term that you specify. If you select term *0000,* you can admit students to the subplan for any term. When you convert data to the PeopleSoft system, be sure that you select a first valid term that is appropriate for the preexisting data for the academic subplan. This field is optional.

Note. Students can change this subplan when their admit term is prior to this term as long as the effective date of the change is greater than or equal to the start date of this term.

Default of Req Term (default of requirement term) Select the default term for which the system begins accumulating requirements for the academic subplan. You can override the default value for individual students on the Student Sub-Plan page. Modification of these translate values requires significant programming effort.

Note. Set a default here so that when you analyze completion requirements for an academic subplan, you know which set of requirements to use. Requirements can change over time.

Evaluate SubPlan Before Plan Select to alter reporting sequences. This check box is a feature of Academic Advisement.

Diploma Select to print a description on student diplomas. The Diploma Description field becomes available.

Transcript Select to print a description on student transcripts. The Transcript Description field becomes available.

Diploma Description Enter the description of the academic subplan. This description appears on student diplomas. The PeopleSoft system currently does not provide a process to print diplomas.

Transcript Description Enter the description of this academic subplan. This description appears on student transcripts. You can override this text when you prepare students' transcripts.

Indent Specify the number of spaces that you want to indent the related description when printing the document.

See Also

PeopleSoft Enterprise Academic Advisement 8.9 PeopleBook, "Setting Up Academic Requirement Groups," Changes to Academic Structure Processing

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts"

Setting Up Taxonomy

Access the Academic Sub-Plan Taxonomy page.

CIP Code (Classification on International Programs code) Select the CIP code for the academic subplan. CIP code values are delivered with the PeopleSoft system as translate values. You can modify CIP codes on the CIP Code Table page.

HEGIS Code (Higher Education General Information Survey code) Select the HEGIS code for this academic subplan. HEGIS codes are delivered with the PeopleSoft system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

CHAPTER 10

Introducing Security for Your System

This chapter provides overviews of application security and security vocabulary and discusses how to specify row-level security options.

Understanding Application Security

PeopleSoft applications use the capabilities and flexibility of multilevel security to provide an efficient, effective security solution. When you manage an environment with shared data, you need a security system that protects data at various access levels. You also need the flexibility to define the most effective and efficient path to that data across business groups, tables, departments, pages, and so forth. PeopleSoft uses an approach that enables you to set up data access at different entry points within the system.

Security access falls into three categories:

- Network security.
- Database security.
- PeopleSoft application security.

Network security controls the overall point of entry into system hardware and software. Database security narrows the scope of user access to information. Application security enables you to control access down to the level of an individual field.

Most system users typically have access to a defined set of functions, pages, or fields that enable them to perform their jobs. Examples of such users are:

- Auditors who must review inquiry pages and generate reports.
- Users who run PeopleSoft business processes.
- Management information systems staff members who configure and maintain pages and records.

In PeopleSoft applications, you have full control over security definitions and how they fit together. The security options that you select create a matrix that enables or blocks user access to data through a series of authorizations. Users pass through several levels of authorizations before the system grants them access to any subset of the data.

Important! Creating security for prompt values or rows of data is *not* the same as giving security access to pages, which you do in PeopleTools. Giving users access to pages by using PeopleTools is required in addition to the security setup discussed in this chapter.

Understanding Security Vocabulary

Make sure that you understand the security terms and functions for each level of the system:

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system (RDBMS)	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups used in application development.
Query	PeopleTools	Defines which set of table rows a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Controls access to the subset of data rows within tables to which the user has authority.
Field-level	PeopleCode	Controls access to individual fields within pages.

Specifying Row-Level Security Options

This section provides an overview of row-level security and discusses how to:

- Maintain row-level security.
- Set up row-level security views.
- Define row-level security for users.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Row-Level Security

To establish security within the PeopleSoft application, decide what level of security to establish throughout the system, which key fields to secure, and whether security will be handled through user IDs or roles. Security can restrict individual users or roles from specific rows of data that are controlled by such key fields as setID and business unit. You can also limit user access to a specific subset of rows. For example, user ID security can allow the law school to access only the item types assigned for the law school. Or, if you have a group of staff in the registrar's office, you can add them all to a role and use role security to enforce the appropriate limits on their system access. A user may be assigned to one or more roles, providing considerable flexibility to access necessary resources. As a result, a user who is linked to more than one role can use the menu items assigned to any of those roles. Some security attributes—such as row-level security—cannot be defined by combining roles. Only one role can be used for this purpose. In PeopleTools, Maintain Security, you designate row-level security for a user by selecting a role. The row-level security attributes for the role that you select then become the security attributes for that user.

Because various combinations of security are possible, it is important to understand the effects of row-level security when you use this mix of system security options and roles:

System Security	Role of User ID	Row-Level Security
No security	User ID is not linked to a role.	Not applicable; each user can access any object because there is no security implemented.
User-level security	User ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. It is possible, however, to link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then that user has access to menu items, but does not have access to any application pages with key fields enabled for row-level security.

You must set up which users or roles have access to specific business units, setIDs, and any other key fields that the application requires. For example, you might permit access to only one business unit for a certain role of users.

When a user in this role enters data, the system requires a business unit because this is the primary key for data related to the business unit. The available selections on the prompt list for this user include only the business units for which the user has been granted authority. What appears in the prompt list is data that has been filtered through one or more levels of security.

Maintaining Row-Level Security

The sheer number of users assigned the same level of security should be a key factor in determining whether the type of security should be based on user ID or role maintenance. If there are thousands of users who have identical access requirements, it is a good idea to explore roles. By assigning these users to a single role, subsequent changes in access requirements for these users can be made once rather than multiple times.

Setting Up Row-Level Security Views

Business units and tableset IDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to selecting only the values that have already been defined for that edit table. PeopleSoft row-level application security, when activated, enables you to specify values from the edit table, so that only those values are available in a particular view. Think of views as a means to access data horizontally across more than one table. Views are Structured Query Language statements that filter out data rows whose key values are not needed as valid access parameters. The result is that users who are authorized to access setIDs or business units see only a subset of the values from these edit tables. After these views are set up, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from a particular role.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Language Reference, "PeopleCode Built-in Functions"

Defining Row-Level Security for Users

After you select security options and set up security view names, you are ready to define the actual secured field values used by each user or role. When you secure key fields in the application, the page that you use depends on which level of system security you select. If you select user-level security, you utilize user security pages. If you select role-level security, you use the permission list security pages.

CHAPTER 11

Securing Your Academic Institution

This chapter discusses how to:

- Secure access to student data.
- Secure academic structure.
- Secure academic organizations.

Securing Access to Student Data

To set up student data security access, use the Security Views component (ES_SECURITY_TBL), the Security Views Update component (RUNCTL_SRSECVWU), and the Security View Change Audit component (SECURITY_AUDIT).

You can secure a user's access to pages that contain student information.

This section provides an overview of security for access to student data, lists prerequisites (including delivered security views), and discusses how to:

- Set component security.
- Run the Security Views Update SQR process (SRSECVWU) and report.
- Specify search parameters for security view changes.
- Review security table audit information.
- Review security detail audit information.

Understanding Security for Access to Student Data

The Component Security feature provides the option to impose security on selected components, based on a student's institution, career, program or plan. You set the specific security level on the Security Views page. The security level determines which search record (or security view) is used when the user attempts to access the component. Select *No Security* to retain the original search records that are delivered with the system. The security views delivered with this feature enable the system to verify that the user has access to the appropriate institution, career, program, or plan to view, update, or add data relating to a student's record.

The security level becomes effective only after you run the Security Views Update process. This process exchanges the original search record with one of the delivered security views for a component (if you select the Global Security option) or a specific menu item. In the latter case, the component search record is overridden only on the specific menu item with one of the security views. Consequently, you can impose different levels of security for components that are accessed using different navigation paths.

After you have created security views for the institution and applied views for components that you want to secure, you can use the Security View Change Audit component to view the details of any changes to those settings. For example, you can view the user ID, date of action and action taken, and the security level settings for a particular component. You can see when the security view was created, updated, or deleted, and you can view the state of the record before and after a change. A check box on the Search Criteria page controls how the system returns values that match the selection criteria.

Note. This feature should not be used to update search record security for self-service features.

Here's how to secure access to student data:

1. Identify and define levels of security for a component on the Security Views page.
2. Update security definitions by running the Security Views Update process on the Security Views page.
3. (Optional) Perform an audit of changes to security in the Security View Change Audit component.

Prerequisites

Before you implement component security, identify people at the institution who have both technical and functional expertise and who can review this feature. Although the Component Security feature is functional in application, it is quite technical in design and implementation. The individuals assigned to evaluate, incorporate, and support this feature must not only understand the way staff and faculty interact with student-centered components at the institution, they must also have a solid understanding of table structures, security views, and page caching. A working knowledge of managing version control and PeopleSoft lock records is also useful.

Begin the review process by thoroughly investigating delivered security views for all tables. To do this, run the Security Views report with the Report Only option selected. Notice in the report that the majority of delivered component security views are not set at the global level but at the menu item level. Also most of the delivered views are limited to PeopleSoft Enterprise Academic Advisement, PeopleSoft Enterprise Recruiting and Admissions, PeopleSoft Enterprise Campus Community, and PeopleSoft Enterprise Student Records. Every delivered security view is set to a value of *None.* This means that no security is implemented (other than standard preexisting people search filters) until you change this setting for every component that you want to secure. Familiarize yourself with the five levels of security that are available, and decide which levels work for the components at the institution.

Upon review of the delivered security views, evaluate and set the security-level settings for all components. Again, all delivered component views have the security level *None,* so you must update this value and assign data in the Security Views fields accordingly. You can change these settings at any time, but you must run the Security Views Update process to activate the changes.

Note. PeopleSoft delivers security views setup data for some Financial Aid components and most of the Campus Community components within the new Campus Community student-only menus. These secure views restrict access to student data for specific user IDs by institution, career, program, and plan. Note that applying component security is optional, and applies only to schools that set up security for Financial Aid, Campus Community, and Enrollment Services tasks.

See Chapter 12, "Securing Campus Community," Applying Demographic Data Access Security, page 223.

The table below lists the default settings for the Financial Aid components that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- Security Level = *No Security*

- Global Security = Yes (selected)

Component names with an asterisk (*) also display the following security setting: Exclude Add Searchrecord = Yes (selected)

Component Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
ANTICIPATED_AID	STDNT_ANT_SRCH1	STUAN1_INS_SCTY	STUAN1_CAR_SCTY	STUAN1_PRG_SCTY	STUAN1_PLN_SCTY
ANTICIPTD_AID_EDIT	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
ANTICIPTD_AID_SUMM	STDNT_ANT_SRCH2	STUAN2_INS_SCTY	STUAN2_CAR_SCTY	STUAN2_PRG_SCTY	STUAN2_PLN_SCTY
AS_OF_STATUS	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ACTIVITY	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_ENTRY_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_MANUAL_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_DETAIL	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_NOTIF_INQ	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_OVERRIDE_MC	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
AWARD_SUMMARY	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
DISBURSE_AID	STDNT_DISB_SRCH	STUDSB_INS_SCTY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY
DISBURSE_AID_WO	STDNT_DISB_SRCH	STUDSB_INS_SCTY	STUDSB_CAR_SCTY	STUDSB_PRG_SCTY	STUDSB_PLN_SCTY
FA_EARNINGS	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
INST_ADD	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
ISIR_ADD_SCHOOL	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY

Component Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
ISIR_AUDIT	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
ISIR_DELETE_ PG	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
LN_CL_PNOTE	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
LN_CL_ PNOTE_STAF	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
LOAN_FUND_ MAINT	LN_CL_FUND_ SRCH	LNCLFN_INS_ SCTY	LNCLFN_CAR_ SCTY	LNCLFN_PRG_ SCTY	LNCLFN_PLN_ SCTY
LOAN_ORIG*	LOAN_UPD_ SRCH	LN_UPD_INS_ SCTY	LN_UPD_CAR_ SCTY	LN_UPD_PRG_ SCTY	LN_UPD_PLN_ SCTY
LOAN_ORIG_ TRANS	LN_CL_TRNS_ SRCH	LNCLTR_INS_ SCTY	LNCLTR_CAR_ SCTY	LNCLTR_PRG_ SCTY	LNCLTR_PLN_ SCTY
LOAN_STDNT_ AWD	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
LOAN_TRANS_ INQ	LOAN_UPD_ SRCH	LN_UPD_INS_ SCTY	LN_UPD_CAR_ SCTY	LN_UPD_PRG_ SCTY	LN_UPD_PLN_ SCTY
REVIEW_ USER_EDITS*	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
RUN_ VERIFICATION	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_ALT	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_PLUS	STDNT_AID_ SRCH	TUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
SFA_CRC_ PNOTE_STAF	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
SS_FA_AU_ STATUS	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
STDNT_AID_ PACKAGE	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
STDNT_AWD_ PER_RSRC	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY
STDNT_AWRD_ CATG	STDNT_AID_ SRCH	STUAID_INS_ SCTY	STUAID_CAR_ SCTY	STUAID_PRG_ SCTY	STUAID_PLN_ SCTY

Component Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
STDNT_AWRD_INQUIRY	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_BDGT_ADJUST	STDNT_AWDPER_VW	SAWPER_INS_SCTY	SAWPER_CAR_SCTY	SAWPER_PRG_SCTY	SAWPER_PLN_SCTY
STDNT_BDGT_CALC	STDNT_BDGT_SRCH	STUBGT_INS_SCTY	STUBGT_CAR_SCTY	STUBGT_PRG_SCTY	STUBGT_PLN_SCTY
STDNT_BUDGET_SUMM	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_DISB	STDNT_DISB_SCH2	STUDS2_INS_SCTY	STUDS2_CAR_SCTY	STUDS2_PRG_SCTY	STUDS2_PLN_SCTY
STDNT_FA_TERM	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_FAN_ATRBT	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_PKG_VARS	STDNT_PKG_SRCH	STUPKG_INS_SCTY	STUPKG_CAR_SCTY	STUPKG_PRG_SCTY	STUPKG_PLN_SCTY
STDNT_RESTRCTD_AID	STDNT_AID_SRCH	STUAID_INS_SCTY	STUAID_CAR_SCTY	STUAID_PRG_SCTY	STUAID_PLN_SCTY
STDNT_TERM_BUDGET	STDNT_BDMT_SRCH	STUBMT_INS_SCTY	STUBMT_CAR_SCTY	STUBMT_PRG_SCTY	STUBMT_PLN_SCTY

The table below lists the default settings for the Campus Community components in the student-only menus that have security views. These are the default component settings delivered on the Security Views page. All components in the table display the following security settings:

- Security Level = *No Security*
- Global Security = No (not selected)
- Exclude Add Searchrecord = No (not selected)
- No Security View = STUDENT_SRCH
- Institution Security View = CC_STU_INS_SCTY
- Career Security View = CC_STU_CAR_SCTY
- Program Security View = CC_STU_PRG_SCTY
- Institution Security View = CC_STU_PLN_SCTY

Component Name	Menu Name	Application Designer Bar Name
ADDRESS_MAINT	CC_BIO_DEMO_DATA_STDNT	USE
CC_ADDR_SEASONAL	CC_BIO_DEMO_DATA_STDNT	USE
CITIZEN_PASSPORT	CC_IDENTIFICATION_DATA_STDNT	USE
DRIVER_LIC_SA_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
ETHNIC_DTL_PERS	CC_BIO_DEMO_DATA_STDNT	USE
EXT_SYS_ID_PERS	CC_SERVICES_DATA_STDNT	USE
E_MAIL_ADDR_PERS	CC_BIO_DEMO_DATA_STDNT	USE
FERPA_ADMIN_QENTRY	CC_SERVICES_DATA_STDNT	USE
FERPA_DISPL_PERS	CC_SERVICES_DATA_STDNT	INQUIRE
FERPA_PERS	CC_SERVICES_DATA_STDNT	USE
HNR_AWD_PERS	CC_PARTICIPATION_DATA_STDNT	USE
IMMUNIZATN_HEALTH	CC_HEALTH_DATA_STDNT	USE
INST_REL_PERS	CC_SERVICES_DATA_STDNT	USE
LS_EXTRA_ACTIVITY	CC_PARTICIPATION_DATA_STDNT	USE
LS_PUBLICATIONS	CC_PARTICIPATION_DATA_STDNT	USE
NAMES_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PEOPLE_ATHL_PERS	CC_PARTICIPATION_DATA_STDNT	USE
PEOPLE_PHTO_PERS	CC_IDENTIFICATION_DATA_STDNT	USE
PHONE_PERS	CC_BIO_DEMO_DATA_STDNT	USE
PIN_PERS	CC_SERVICES_DATA_STDNT	USE
RELATIONSHIPS	CC_BIO_DEMO_DATA_STDNT	USE
RELIG_PREF_PERS	CC_BIO_DEMO_DATA_STDNT	USE
RESIDENCY_PERS	CC_IDENTIFICATION_DATA_STDNT	USE

Component Name	Menu Name	Application Designer Bar Name
SA_DECEASED_DATA	CC_SERVICES_DATA_STDNT	USE
SCC_ACCOM_REQUEST	CC_HEALTH_DATA_STDNT	USE
SCC_BIO_DEMO	CC_BIO_DEMO_DATA_STDNT	USE
SCC_EMERG_CNTCT	CC_BIO_DEMO_DATA_STDNT	USE
SCC_HS_EXAM_AUDIO	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_EYE	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_PHYS	CC_HEALTH_DATA_STDNT	USE
SCC_HS_EXAM_RESP	CC_HEALTH_DATA_STDNT	USE
SCC_IMPAIR_DTL	CC_HEALTH_DATA_STDNT	USE
SCC_LANGUAGES_PERS	CC_BIO_DEMO_DATA_STDNT	USE
SCC_LICENSE_CERT	CC_PARTICIPATION_DATA_ STDNT	USE
SCC_MEMBERSHIPS	CC_PARTICIPATION_DATA_ STDNT	USE
SERVICE_IND_PERS	MAINTAIN_SERVICE_IND_ STDNT	USE
SSR_STDN_DATA_DEST	CC_BIO_DEMO_DATA_STDNT	USE
VISA_PERMIT_PERS	CC_IDENTIFICATION_DATA_ STDNT	USE
WORK_EXPERIENCE	CC_BIO_DEMO_DATA_STDNT	USE

Refer to the following book to learn more about how the system renders Application Designer menus through the portal.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

The table below lists the default settings for the Enrollment Services components that have security views. If there is no menu or Application Designer Bar Name listed, then the value for Global Security = Yes (selected).

Component Name	Menu Name	Application Designer Bar Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
ACADEMIC_ DEGREE			STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
ACAD_ HISTORY_ PERS	PROCESS_ TRANSFER_ CREDIT	USE	PEOPLE_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
ACAD_ PLAN			STDNT_ CAR_ SRCH	STUCAR_ INS_SEC	STUCAR_ CAR_ SEC	STUCAR_ PRG_ SEC	STUCAR_ PLN_ SEC
ACAD_ TST_RSLT_ PERS	PROCESS_ TRANSFER_ CREDIT	USE	PEOPLE_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
ACAD_ TST_SUM_ PERS	PROCESS_ TRANSFER_ CREDIT	INQUIRE	PEOPLE_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
ADM_ APPL_ SUMM			PEOPLE_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
APPOINT-MENTS			STDNT_ TERM_ SRCH	STUTRM_ INS_SEC	STUTRM_ CAR_ SEC	STUTRM_ PRG_ SEC	STUTRM_ PLN_ SEC
CHKLST_ SUMM_ PERS	TRACK_ STUDENT_ CAREERS	INQUIRE	STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
COMM_ SUMMARY_ PERS	TRACK_ STUDENT_ CAREERS	INQUIRE	STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
ENRL_ REQUEST			ENRL_ REQ_ SRCH	ENRLREQ_ INS_SEC	ENRLREQ_ CAR_ SEC	ENRLREQ_ PRG_ SEC	ENRLREQ_ PLN_ SEC
HNR_AWD_ EXT_PERS	MANAGE_ ACADEMIC_ RECORDS	USE	STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY

Component Name	Menu Name	Application Designer Bar Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
HNR_AWD_EXT_PERS	TRACK_STUDENT_CAREERS	USE	STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
INSTR_ADVSR_PERS	DEFINE_STUDENT_RECORDS	SETUP	PEOPLE_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
OPR_3C_SUM_PERS	TRACK_STUDENT_CAREERS	INQUIRE	STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
SERVICE_IND_PERS	TRACK_STUDENT_CAREERS	USE	STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_ADVISOR			STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_CAREER			STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_CONS_STAT			STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY
STDNT_ENRL_INQ			STDNT_TERM_SRCH	STUTRM_INS_SEC	STUTRM_CAR_SEC	STUTRM_PRG_SEC	STUTRM_PLN_SEC
STDNT_GRADE_INQ			STDNT_TERM_SRCH	STUTRM_INS_SEC	STUTRM_CAR_SEC	STUTRM_PRG_SEC	STUTRM_PLN_SEC
STDNT_INCOMPLETE			STDNT_INC_SRCH	STDINC_INS_SEC	STDINC_CAR_SEC	STDINC_PRG_SEC	STDINC_PLN_SEC
STDNT_TERM_SEARCH			STDNT_SRCH	STDNT_INS_SCRTY	STDNT_CAR_SCRTY	STDNT_PRG_SCRTY	STDNT_PLN_SCRTY

Component Name	Menu Name	Application Designer Bar Name	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
STDNT_ XTRACT_ PERS			STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
STUDENT_ MILESTONE1			STDNT_ MLST_ SRCH	STDMLST_ INS_SEC	STDMLST_ CAR_ SEC	STDMLST_ PRG_ SEC	STDMLST_ PLN_ SEC
STUDENT_ PHOTO_SA			STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
TERM_ HISTORY			STDNT_ SRCH	STDNT_ INS_ SCRTY	STDNT_ CAR_ SCRTY	STDNT_ PRG_ SCRTY	STDNT_ PLN_ SCRTY
TSCRPT_ TEXT			STDNT_ CAR_ SRCA	STUCAR_ INS_SEC	STUCAR_ CAR_ SEC	STUCAR_ PRG_ SEC	STUCAR_ PLN_ SEC

Refer to the following book to learn more about how the system renders Application Designer menus through the portal.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

The components below display the following security settings: Exclude Add Searchrecord = Yes (selected):

- ACAD_PLAN
- ENRL_REQUEST
- LOAN_ORIG
- REVIEW_USER_EDITS
- STUDENT_MILESTONE1

You can create additional security for components not included in the PeopleSoft-delivered set, using one of two methods:

- If the component already uses one of the search records listed in the table above, add the component using the Security Views page and enter all of the corresponding views in the Security Views group box.

  Use the table as the template.

- If the component uses a search record other than the ones listed above, you can create modified security views for institution, career, program, and plan security.

  Add the component using the Security Views page and enter all of its corresponding modified views in the Security Views group box.

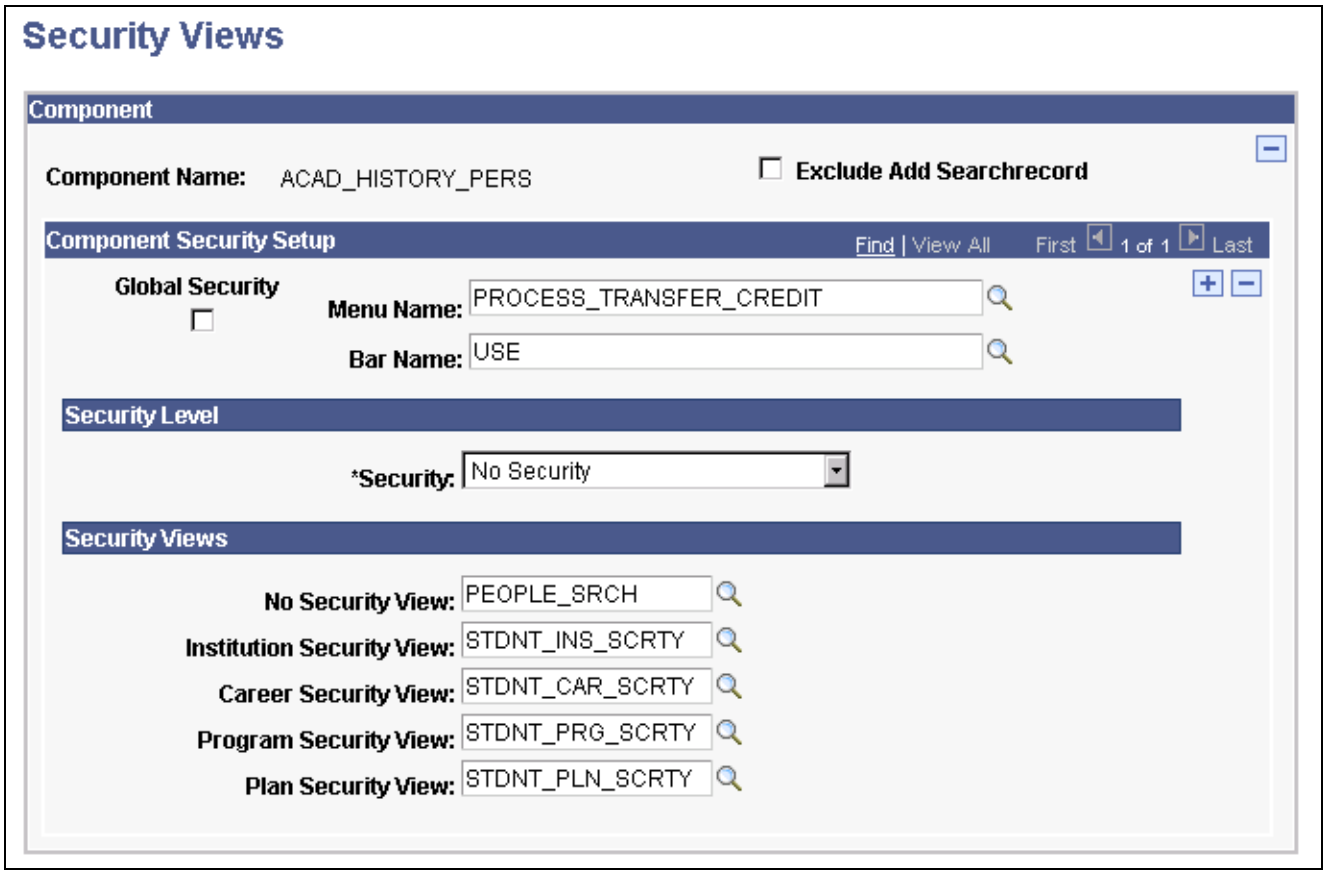
Pages Used to Secure Access to Student Data

Page Name	Object Name	Navigation	Usage
Security Views	ES_SECURITY_TBL	Set Up SACR, Security, Secure Student Administration, User ID, Security Views	Set component security and identify student-related components to which you want to assign security. In addition, specify the level of security (institution, career, program, plan) that you want to use.
Security Views Update	RUNCTL_SRSECVWU	Set Up SACR, Security, Secure Student Administration, Process, Security Views Update	Run the Security Views Update process after you set up or alter security views. Create the Security Views summary report for all security views at the institution.
Search Criteria	SECURITY_AUDIT	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Search Criteria	Specify search parameters for component security view changes.
Security Table	AUD_SECURITY_TBL	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Table	Review security table audit information about security view changes that match the selection criteria specified on the Search Criteria page. This page displays any changes made to the Add Searchrecord setting for the table.
Security Detail	AUD_SECURITY_DTL	Set Up SACR, Security, Secure Student Administration, User ID, Security View Change Audit, Security Detail	Review security detail audit information about security view changes that match the selection criteria specified on the Search Criteria page. Security detail values correspond to the parent record on the Security Table page.

Setting Component Security

Access the Security Views page. When you search for existing values before entering this page, you can search by *Institution Security View*.

Note. Adding components to the Security Views page does not automatically secure them. After you have specified all necessary components and views on the Security Views page, run the Security Views Update process to implement the settings.



Security Views page

When a user attempts to access one of the components that you specify, the system checks the user's security for the institution, career, program, or plan to verify that the user has permission to access the student data using the component. In some cases, the navigation is also verified.

Note. Adding components to the Security Views page does not automatically secure them. After you have specified all necessary components and views on the Security Views page, run the Security Views Update process to implement the settings.

Component

Exclude Add Searchrecord Select to run the Security Views Update process without updating the Add Searchrecord settings.

Note. If the check box is cleared, you may inadvertently overwrite predefined Add Searchrecord views. Before running the Security Views Update process with the check box cleared, review the Add Searchrecord settings by running a query or by reviewing the Add Searchrecord settings in PeopleSoft Application Designer on the component Properties page.

All delivered security view settings initially have this check box cleared, with the exception of ENRL_REQUEST components. To change this setting, do so before running the Security Views Update process.

Component Security Setup

Global Security

Select to secure the component name everywhere that the component is used, regardless of the menu name or bar name.

Do not select this check box if want to have different security views set up for the component, depending on the navigation path. For example, if you access the component through the portal by selecting Records and Registration, 3C's Summaries, you may want to clear the Global Security check box and enter the underlying menu structure for this component . Then, insert a second row that specifies unique security level and security view data for the component name if you access it by selecting Campus Community through the portal.

Menu Name

If you do not select the Global Security check box, this field is available for entry. Specify the particular menu name for which you want to apply this security view. Use this field to isolate a component name that is accessible using multiple navigation paths (for example, INSTR_ADVSR_PERS) when you want component security to vary depending on the navigation.

Bar Name

If you do not select the Global Security check box, the Bar Name field is available for entry. Specify the bar name that coincides with the selected menu name for which you want to apply this security view. Use this field to isolate a component name that is accessed by multiple navigation paths when you want component security to vary depending on the navigation.

Security Level

Security

Use this field to specify the security that you want to apply at this level for the component name. The level specified here determines which user IDs can access the component. For example, if you set the Security field to *Program Level Security,* a user who attempts to access the specified component must have security set up on the Academic Program Security page for the same academic program as the student data that is accessed. In addition, if the user has access to careers and plans but has no user ID security set up for access to programs (and, in particular, the program of the accessed student data), then the user is denied access.

Security level options are:

No Security: Impose no security on the component name specified. Never delete a delivered component security view entry, even if the institution does not need it. Instead of deleting the security view entry for a particular component, set the Security field to *No Security.*

Institution Level Security: Secure the component name at the institution level. This requires that a user attempting to access student data must have access to the student's institution. This user ID access is set up on the Academic Institution Security page.

Career Level Security: Secure the component name at the career level. This requires that a user attempting to access student data must have access to the student's career. This user ID access is set up on the Institution/Career Security page.

Program Level Security: Secure the component name at the program level. This requires that a user attempting to access student data must have access

to the student's program. This user ID access is set up on the Academic Program Security page.

Plan Level Security: Secure the component name at the plan level. This requires that a user attempting to access student data must have access to the student's plan. This user ID access is set up on the Academic Plan Security page.

Note. Security values are delivered with the PeopleSoft system as translate values. These translate values should not be modified in any way. Modification to these values requires significant programming effort.

Security Views

All of the security view settings delivered with the PeopleSoft system are provided as initial settings that you can alter to fit specific business needs *before* running the Security Views Update process.

The fields for delivered component name security views are populated with the appropriate security view (search record) based on the institution, career, program, plan or no security setting in the Security field. Use of a particular view is determined by the selected security value. You can select any security value, based on your needs, and the corresponding security view is used. All of the security views fields prompt against all security records in the database, including records that you have modified.

You must enter a security view value for the corresponding level specified in the Security field. For example, if you specify *Program Level Security* in the Security field, then you must enter a value in the Program Security View field.

No Security View If *No Security* has been selected in the Security field, then you must enter a value in this field. The view that you select is used to filter (not necessarily secure) the student data that is accessible through the component.

For security views provided by PeopleSoft, this field is set to match each specific component. For example, the ACADEMIC_DEGREE component is delivered with a No Security View field setting of *PEOPLE_SRCH*. This is because the delivered search record for ACADEMIC_DEGREE is set to *PEOPLE_SRCH*. You can change this value.

Institution Security View If *Institution Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT_INS_SCRTY*. This value references the user ID security that is set up on the Institution Security page. You can change this value.

Career Security View If *Career Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT_CAR_SCRTY*. This value references the user ID security that is set up on the Institution/Career Security page. You can change this value.

Program Security View If *Program Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT_PRG_SCRTY*. This value references the user ID security that is set up on the Academic Program Security page. You can change this value.

Plan Security View If *Plan Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user IDs can access the component.

For most security views provided by PeopleSoft, this field is set to *STDNT_PLN_SCRTY*. This value references the user ID security that is set up on the Academic Plan Security page. You can change this value.

Note. Components based on search records other than PEOPLE_SRCH are delivered with settings different from those described here for Institution Security View, Career Security View, Program Security View, and Plan Security View.

SQL Statements to Find Component Occurrences

You can use these Structured Query Language (SQL) select statements to find out the global and specific occurrences of a particular component:

- To identify components that have multiple menu paths, use this SQL Select statement:

```
SELECT PNLGRPNAME, MENUNAME, BARNAME, ITEMLABEL FROM PSMENUITEM
WHERE PNLGRPNAME = 'COMM_SUMMARY_PERS'
```

- To determine if a search record exists at the menu level, you can use either the PeopleSoft Application Designer Menu Item Properties page, or this SQL Select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSMENUITEM
WHERE PNLGRPNAME = 'ACAD_PLAN'
```

  If a search record exists, the search record at the component level has no effect here. Consequently, the page is secured at the menu level using this search record.

- To identify the search record at the component level, you can use either the PeopleSoft Application Designer Component Properties page, or this SQL Select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSPNLGRPDEFN
WHERE PNLGRPNAME = 'ACAD_PLAN'
```

  If a search record does not exist at the menu level, the search record at the component level is used to access and secure the page.

Running the Security Views Update Process and Report

Access the Security Views Update page. After you assign new security views to Financial Aid or Campus Community components, you must re-run the Security Views Update process to accommodate the new views.

Important! The first time all users log on to the system after you run the Security Views Update process, all PeopleTools data pertaining to pages is recached. Consequently, you should run this process at the same time that you run other major maintenance processes, rather than immediately before a heavy traffic period for the institution. Recaching pages slows initial page access for users. In addition, if you erroneously delete or change security, it is better to discover the error during a system lull than during a peak admission, billing, or registration period.

Report Only Select to create the SA Security Views Update (student administration security views update) report (SRSECVWU) without updating security view access for components at the institution.

If this check box is cleared, the process updates security view access *and* creates the Security Views report.

Run Run the Security Views Update process (SRSECVWU) as needed. When you run this process, the system updates PS Lock (PeopleSoft lock) record.

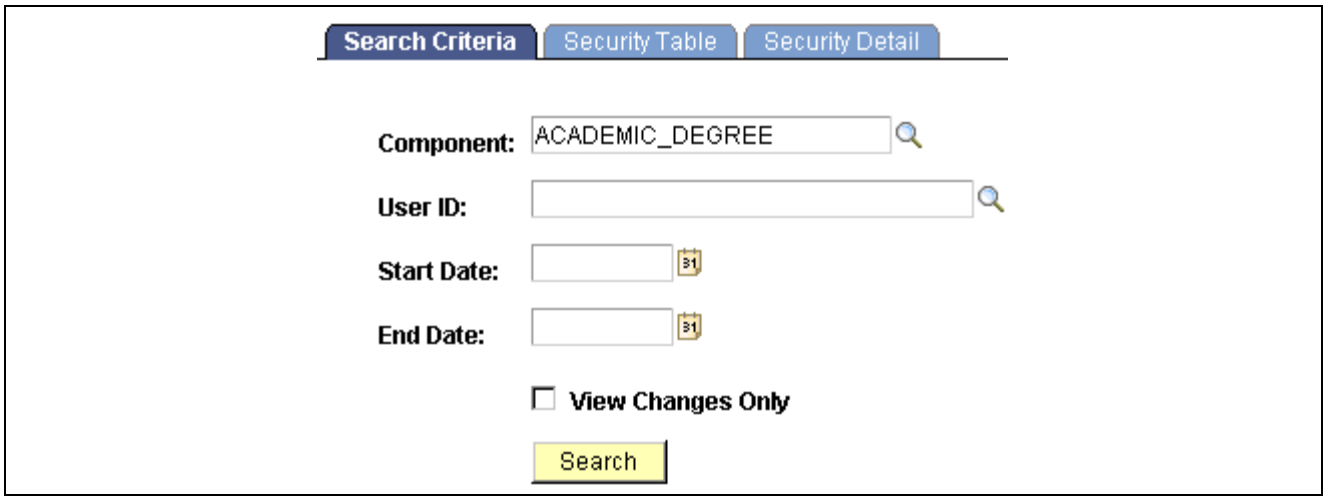
The Security Views Update process allows you to move from menu-specific security view settings to global settings without the risk of creating inaccurate search record data. Specifically, the process:

- Removes the menu component search record override.
- Enables the system to use the component search record that was updated by the SQR.

Important! *Do not* run the update process until you are satisfied with all of the security views data, including the security views data delivered by PeopleSoft. Before you run the process, review all of the security views data settings thoroughly—paying close attention to the Exclude Add Searchrecord and Global Security options.

Specifying Search Parameters for Security View Changes

Access the Search Criteria page.



Search Criteria page

Component Enter the component object name to be audited for security. This field is required.

User ID Enter the user ID that you want to audit. Leave this field blank to have the system retrieve all values for this field.

Start Date Enter the earliest date to be audited. Leave this field blank to have the system retrieve all values for this field.

End Date Enter the latest date to be audited. Leave this field blank to have the system retrieve all values for this field.

View Changes Only Clear this check box to have the system return all records with the action *Insert, Before, After,* or *Delete.*

Select this check box to prevent the system from returning records with the action *Before*.

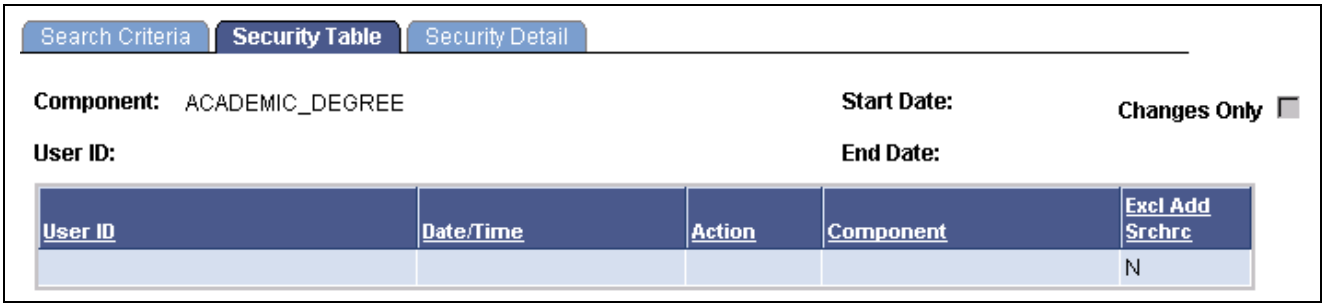
This option controls before-and-after results. If you want to see only the values after the change, then select this check box. If you want to see the both the before and after values, then clear this check box.

Search After you have entered the selection criteria, click this button to return audit data to the Security Table page and the Security Detail page. To change the data that the system returns, update the selection criteria and click this button again.

Note. When you click this button, the retrieval process begins and the system displays the first page with data (either the Security Table page or the Security Detail page). If no changes have been made to the table, the system displays the Security Detail page.

Reviewing Security Table Audit Information

Access the Security Table page.



Security Table page

User ID Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string ******** appears in the User ID field.

Date/Time Displays the date and time when the changes to the Security View table were made.

Action Values are:

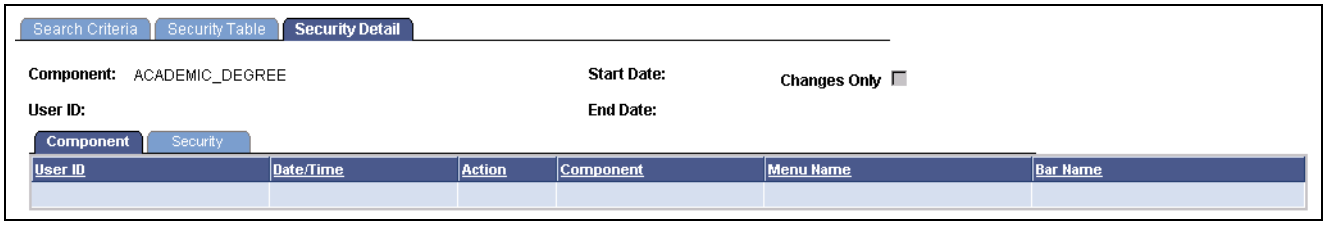
- *Insert:* Indicates that the user inserted a new row in the database.
- *Delete:* Indicates that the user deleted a row from the database.
- *Before:* Indicates an image of the record before it was updated.
- *After:* Indicates an image of the record after it was updated.

Component Displays the component that you selected as part of the search criteria.

Excl Add Srchrc (exclude add search record) Displays the status of the Exclude Add Searchrecord option on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.

Reviewing Security Detail Audit Information

Access the Security Detail page.



Security Detail page: Component tab

Important! To record the security changes that the Security View Audit functionality audits, the IT team must first install and execute delivered SQL trigger files.

The installation guides on Customer Connection provide more information about this topic.

Note. Column order may vary by implementation. All columns may not be visible. Use the horizontal scroll bar on the page to view all available columns.

Component Tab

User ID Displays the user ID of the person who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears because the system does not track the user ID of the person who deletes a record. When deletions occur, the character string ******** appears in the User ID field.

Date/Time Displays the date and time when changes to the Security View table were made.

Action Values are:

- *Insert:* Indicates that the user inserted a new row in the database.
- *Delete:* Indicates that the user deleted a row out of the database.
- *Before:* Indicates an image of the record before it was updated.
- *After:* Indicates an image of the record after it was updated.

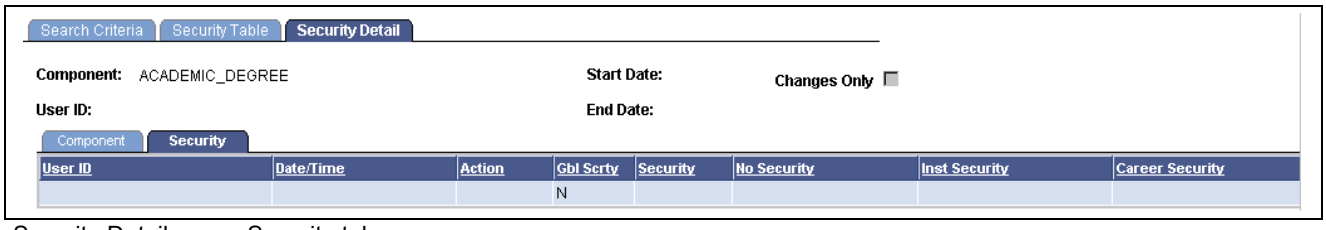
Component Displays the component that you selected as part of the search criteria.

Menu Name Displays the menu name specified on the Security Views page.

Bar Name Displays the bar name specified on the Security Views page.

Security Tab

Select the Security tab.



Security Detail page: Security tab

Gbl Scrty (global security)	Displays the status of the Global Security check box on the Security Views page. The values *Y* for selected and *N* for cleared indicate the status of the check box.
Security	Displays the option selected in the Security field on the Security Views page. Options are: • *NON* (no access): *No Access* was selected on the Security Views page. • *INS* (institution): *Institution Level* was selected on the Security Views page. • *CAR* (career): *Career Level* was selected on the Security Views page. • *PRG* (program): *Program Level* was selected on the Security Views page. • *PLN* (plan): *Plan Level* was selected on the Security Views page.
No Security	Displays the view specified for the component in the No Security View field on the Security Views page.
Inst Security (institutional security)	Displays the view specified for the component in the Institution Security View field on the Security Views page.
Career Security	Displays the view specified for the component in the Career Security View field on the Security Views page.
Program Security View	Displays the view specified for the component in the Program Security View field on the Security Views page.
Plan Security	Displays the view specified for the component in the Plan Security View field on the Security Views page.

Securing Academic Structure

To set up academic structure security, use these components: Academic Institution Security (SCRTY_TABL_INST), Institution/Career Security (SCRTY_TBL_CAREER), Academic Program Security (SCRTY_TABL_PROG), and Academic Plan Security (SCRTY_TBL_PLAN).

Securing the academic structure involves setting up security for academic institutions, academic institution and academic career combinations, academic programs, and academic plans. It is important to set up security for academic institutions individually and jointly with academic careers because not all pages are keyed by both academic institution and academic career, and not all careers are available for every Institution.

This section provides an overview of academic structure security and discusses how to:

- Set security for academic institutions.
- Set security for institution and career combinations.
- Set security for academic programs.
- Set security for academic plans.

See Also

Chapter 5, “Designing Your Academic Structure,” page 67

Chapter 9, “Defining Programs, Plans, and Subplans,” page 159

Enterprise PeopleTools PeopleBook: Security Administration, "User Profiles”

Understanding Academic Structure Security

You secure the academic structure by user ID. Give each user ID access to the academic institutions, academic careers, academic programs, and academic plans that the user needs to work with in the system.

Here’s how to assign academic structure security to a user:

1. Define high-level institution security on the Academic Institution Security page.
2. Define career security by institution on the Institution/Career Security page.
3. Define academic program security on the Academic Program Security page.
4. Define academic plan security on the Academic Plan Security page.

Pages Used to Secure Academic Structure

Page Name	Object Name	Navigation	Usage
Academic Institution Security	SCRTY_TABL_INST	Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security	Set security to determine the academic institutions that a user can access.
Institution/Career Security	SCRTY_TBL_CAREER	Set Up SACR, Security, Secure Student Administration, User ID, Institution/Career Security	Set security for institution and career combinations to determine the combinations that a user can access.
Academic Program Security	SCRTY_TABL_PROG	Set Up SACR, Security, Secure Student Administration, User ID, Academic Program Security	Set security to determine the academic programs that a user can access for the selected institution and career combination.
Academic Plan Security	SCRTY_TBL_PLAN	Set Up SACR, Security, Secure Student Administration, User ID, Academic Plan Security	Set security to determine the academic plan that a user can access for the selected academic institution.

Setting Security for Academic Institutions

Access the Academic Institution Security page.

Academic Institution Select an academic institution to grant the user ID access. You must list all academic institutions that the user ID can access.

Setting Security for Institution and Career Combinations

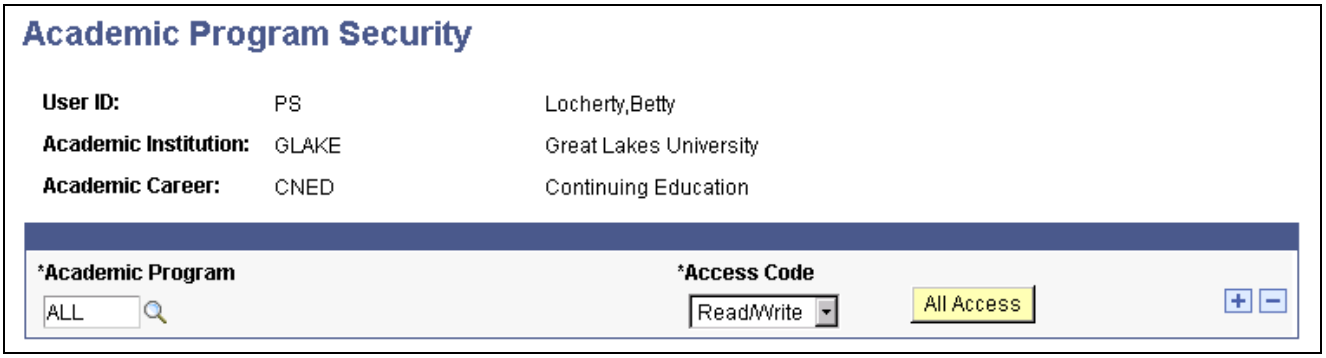
Access the Institution/Career Security page.

Academic Career Select an academic career to assign to the user ID for the selected academic institution. List all of the academic careers that the user ID can access for the selected academic institution.

If a user ID is associated with more than one academic institution, enter career information separately for each institution.

Setting Security for Academic Programs

Access the Academic Program Security page.



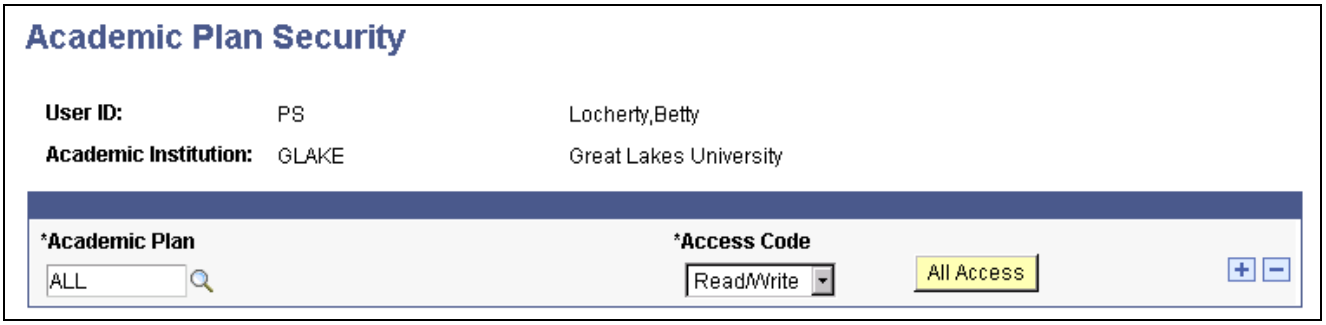
Academic Program Security page

Academic Program For the selected academic institution and academic career combination, enter the specific academic programs that the user ID can access.

If a user ID is associated with more than one institution and career combination, enter program information separately for each combination.

Setting Security for Academic Plans

Access the Academic Plan Security page.



Academic Plan Security page

Academic Plan For the selected academic institution, enter the specific academic plans that the user ID can access.

If a user ID is associated with more than one academic institution, enter academic plan information separately for each user ID and academic institution combination.

Securing Academic Organizations

To set up academic organization security, use the Update Security – Acad Orgs component (RUN_SA505) and the Academic Org Security component (SCRTY_TABL_ACAD).

This section provides overviews of academic organization security trees, security versus organizational structures, and creation of new security trees and discusses how to:

- Update the security tree.
- Granting and restricting access in the security tree.

Understanding Academic Organization Security Trees

Online security is a critical issue in any organization. Because most data in Campus Solutions is confidential, you must specifically designate the data that users can see. To do that, you use an academic organization security tree, which is a security structure that graphically represents the hierarchies of organizational units in an institution. With the security tree, you can view and update the reporting relationships among units and grant and deny user access to data. You can also track changes over time by creating new trees with different effective dates. To set up data security, you create security trees that are based on hierarchies of organizational entities. Using PeopleSoft Tree Manager, you can build a new security tree showing organizational entities such as universities, institutions, and academic departments.

The primary advantage of using a hierarchy for academic organization security is that you do not have to define access rules for every organizational entity. Consequently, updating security access is faster than it would be if you had to update user access for each entity. And with a hierarchy, you can more easily deny access to a particular entity.

Each academic organization that you add to the academic organization security tree has a unique identifier—the academic organization code—which you create on the Academic Organization Table page.

After you create the academic organization security tree, you run the Update Security-Acad Orgs process that links the effective date of the tree structure with the Academic Organization Security table, in which you grant user access to academic organizations. This ensures that the security rules use the tree with up-to-date academic organization hierarchies. You then run the Tree Auditor process to crosscheck the Academic Organization table and the security tree to ensure that the academic organization data matches.

Use the Academic Organization Security table to grant or restrict user access to academic organizations. When you grant users access to an academic organization, you automatically grant them access to data in any academic organization that reports—directly or indirectly—to that academic organization, unless you selectively restrict access to a specific organization.

When you use the security structure that is delivered with Campus Solutions, you grant and deny user access to academic organization data using the same user IDs and roles that the system administrator creates.

See Also

Chapter 5, “Designing Your Academic Structure,” page 67

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Enterprise PeopleTools PeopleBook: Security Administration, "User Profiles”

Understanding Security versus Organizational Structures

Though you use the organizational structure as the foundation for the data security structure, the two structures are not—and should not be—the same. The primary difference between the organizational structure and the data security structure is that you continue to maintain inactive academic organizations in the security structure. You must do this so that users can retrieve historical data associated with the inactive academic organizations.

Unlike an organization chart, a security tree has these characteristics:

- One security tree can be in effect at a time.

  Historical security is irrelevant to user access.

- Inactive academic organizations always appear in security trees.

  Otherwise, data in defunct academic organizations would be inaccessible.

To use trees for reporting purposes to accurately reflect an academic organization chart at a particular point in time, do not use the academic organization security tree. Instead, create a separate academic organization tree. As the organization changes, you can create new effective-dated versions of the academic organization tree. Then, you can easily create queries that extract data from hierarchies, which accurately reflect the academic organization structure at a fixed point in time.

In the steps described for creating an academic organization security tree, it is assumed that you have a hierarchy using academic organizations from the Academic Organization table to grant and deny access to user IDs. This is the structure delivered with Campus Solutions, and it works well if you use the academic organization structure as the basis for the security structure—that is, users should view only specific portions of data, in certain organizational chunks, and the organizational entities are hierarchical.

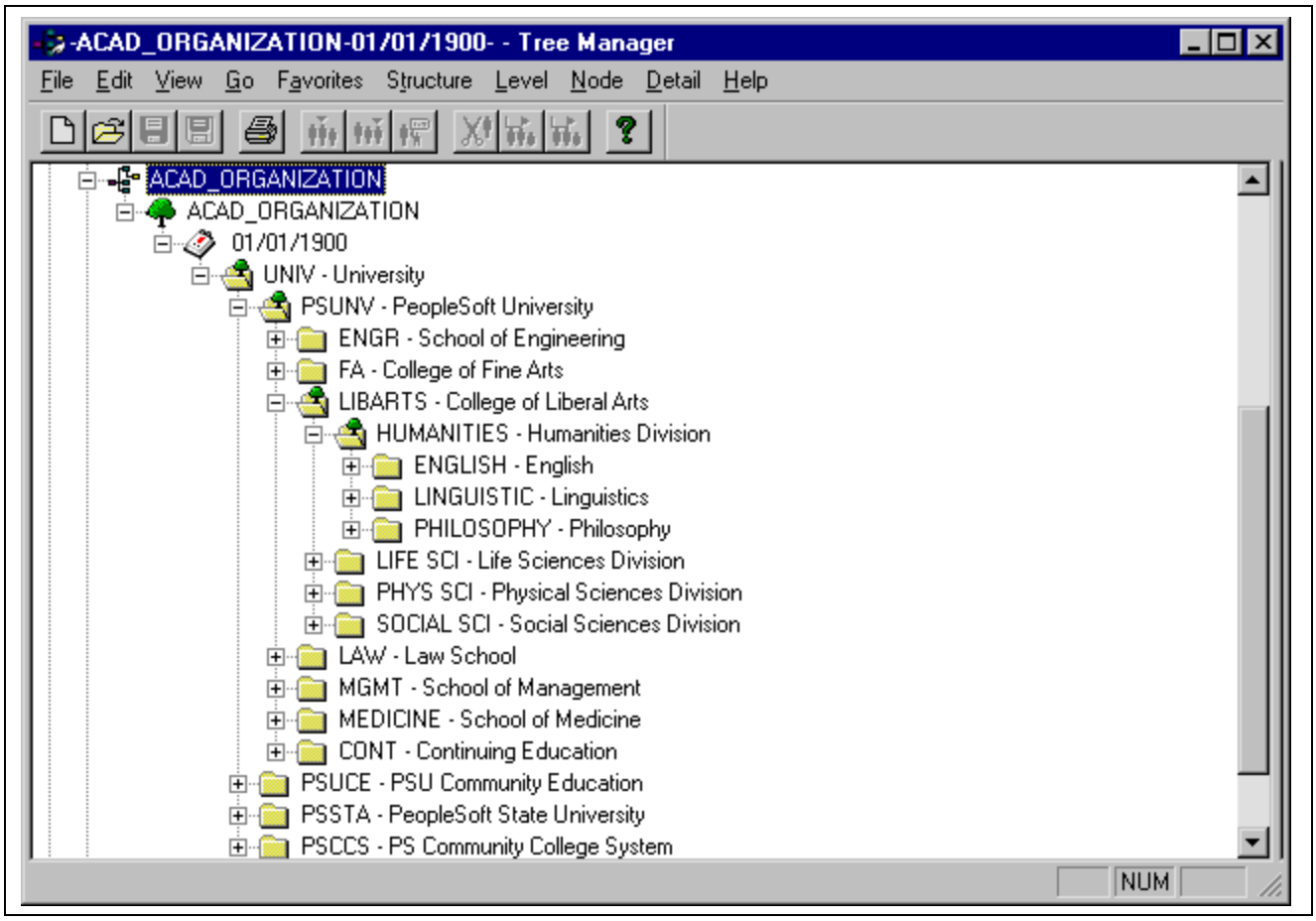
Note. Base the security structure on *current* security needs. For example, you might have only a few users using Campus Solutions for the first six months of implementation. Consequently, you would not need to set up complex security hierarchies at that point. With a simple security hierarchy, you achieve enhanced system performance. When security needs change—for example, when more users begin using the system—you can easily adapt the security structure.

Understanding the Security Tree Creation Process

PeopleSoft Tree Manager offers a powerful visual means to build a security hierarchy for all organizational entities. A tree hierarchy is a quick, graphical method of granting and restricting user access to data in Campus Solutions. You do not have to perform regular audits to prevent circular or conflicting relationships among units, as you do with code-based security. The security hierarchy prevents such relationships from occurring in the first place.

You retain the logical groupings of the hierarchy, such as institutions and academic departments, by representing them as *levels* in the academic organization security tree. The groupings represent a security hierarchy, but they do not have to match the organizational chart.

You use levels and academic organizations to create a hierarchy of security access. For example, users who can access information for *UNIV* (university) can access information for all academic organizations in the institution. On the other hand, users who are granted access to information in *ENGR* (engineering) can access information for only the School of Engineering. The example below shows a completed academic organization security tree:



Academic organization security tree example

From within PeopleSoft Tree Manager, you can view and update existing academic organization data, and you can create new academic organizations. Double-click an academic organization to open the Academic Organization Table page, which contains data for that particular academic organization.

You organize a tree by adding or moving limbs. Whenever you must change the security hierarchy for academic organizations, make a new effective-dated copy of the tree and move limbs to other locations. This practice makes the maintenance of organizational security easier and more accurate. When you add an academic organization to the tree, PeopleSoft Tree Manager links to the Academic Organization table, where you review specific information on the academic organization.

Creating a New Tree

Here are the steps to create a new security tree:

1. Define the tree structure.

   Identify the page definitions, record definitions, and fields for the underlying database tables where tree data is stored.

2. Define the tree for ACAD_ORGANIZATION on the Tree Definition page.
3. (Optional) Specify organizational levels.
4. Define security for academic organizations on the Academic Org Security page.

See Also

Chapter 5, "Designing Your Academic Structure," Defining Academic Organizations, page 102

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Secure Academic Organizations

Page Name	Object Name	Navigation	Usage
Update Security – Acad Orgs (update security – academic organizations)	RUNCTL_ASOFDATE	Set Up SACR, Security, Secure Student Administration, Process, Update Security – Acad Orgs	Link the academic organization security tree to academic organization security so that the system recognizes the current effective-dated academic organization security tree.
Academic Org Security (academic organization security)	SCRTY_TABL_ACAD	Set Up SACR, Security, Secure Student Administration, User ID, Academic Org Security	Grant and restrict access to data for a user ID.

Updating Security Trees

Access the Update Security – Acad Orgs page.

As Of Date Enter the date that the new academic organization security tree becomes active. The Update Security – Acad Org process searches for the academic organization security tree that has an effective date closest to, but not greater than, this date and makes that the active security tree.

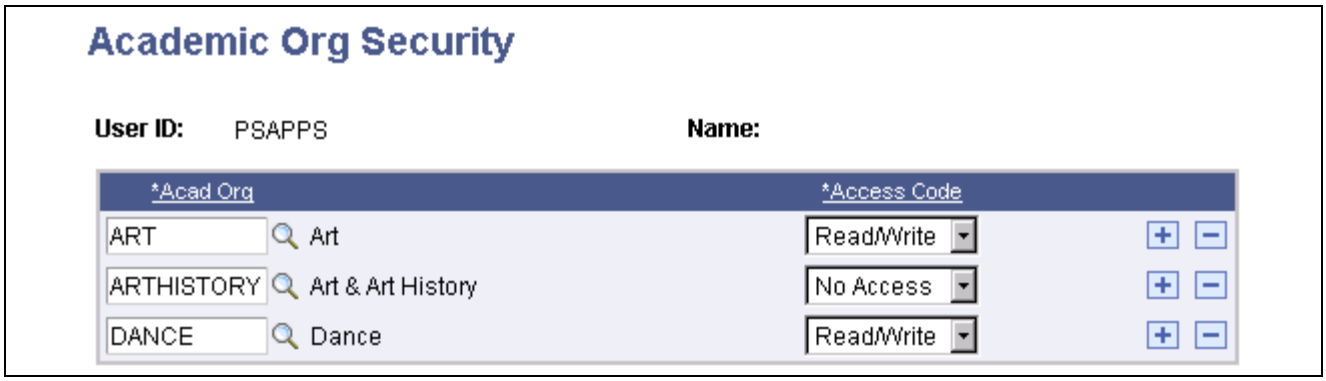
Run Run the Update Security – Acad Org (update security – academic organization) process (SR505) as needed.

Run this process the first time that you create an academic organization security tree, any time that you create an academic organization security tree with a different effective date, and any time that you make a change to the current academic organization security tree.

Important! Because only one academic organization security tree can be in effect at any particular point in time, be sure to run this process only on the date that the new tree takes effect—not before. For example, if the new security tree has an effective date of January 1, 2005, you should run this process on January 1, 2005. The system uses whatever tree has an effective date closest to—but not greater than—the date that you enter in the As Of Date field.

Granting and Restricting Access in Security Trees

Access the Academic Org Security page.



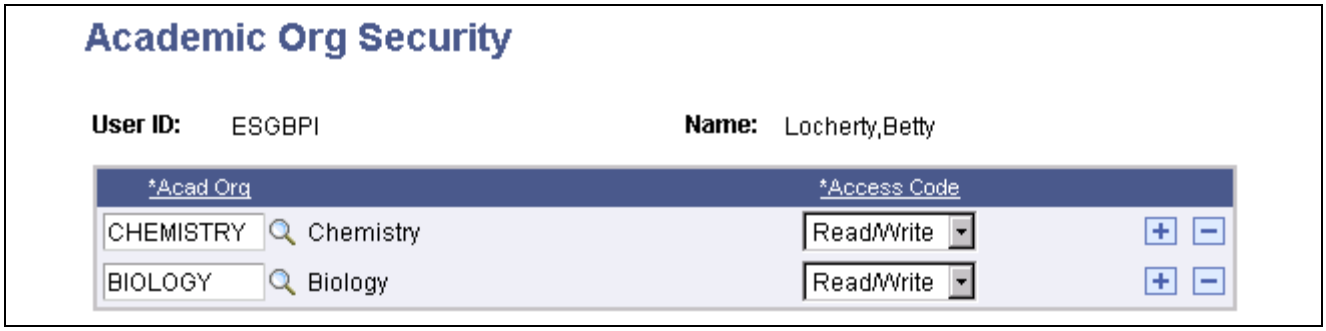
Academic Org Security page

Select the highest academic organization in the hierarchy that the user ID should be able to access. Insert rows to add academic organizations or to restrict access to a particular academic organization lower in the hierarchy.

Academic organization security is based on the hierarchy in the academic organization security tree. The academic organization that you identify here must be a node on the academic organization security tree. Granting access to one node of the academic organization tree also provides access to all child nodes for that organization. To restrict access to a child node, select the academic organization that you want to secure and set the access code to *No Access*.

Example 1

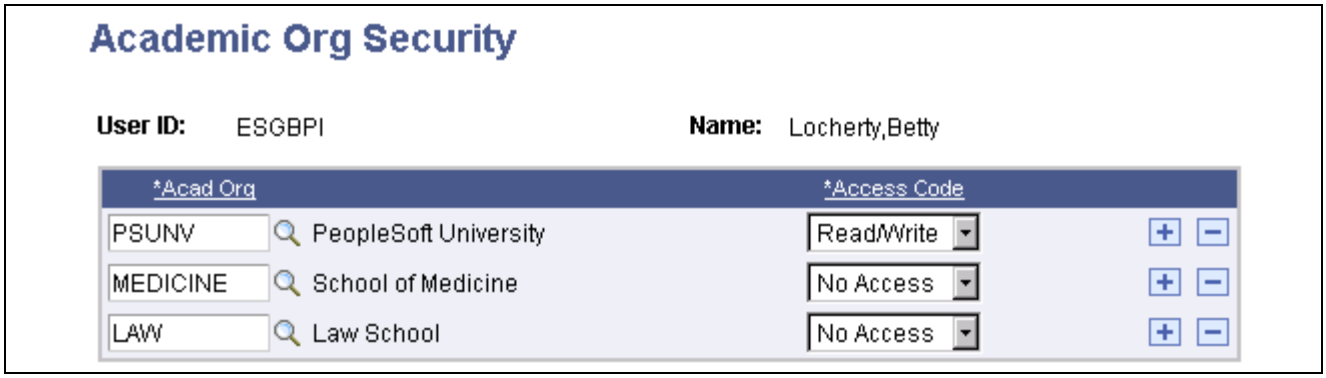
This security setup would grant the user ID access to all academic organizations under the Biology and the Chemistry nodes in the security tree:



Permission for specific academic organizations (SCRTY_TABL_ACAD)

Example 2

This security setup would grant this user ID access to all academic organizations under the PeopleSoft University node, *except* any that fall under the School of Medicine or Law School node:



Permission with restrictions for academic organizations (SCRTY_TABL_ACAD)

The School of Medicine and Law School are excluded because the access code is set to *No Access*.

CHAPTER 12

Securing Campus Community

This chapter discusses how to:

- Set up communication, checklist, and comment (3C) group security.
- Set up service indicator security.
- Copy user security.
- Apply demographic data access security.

Setting Up 3C Group Security

To set up 3C group security, use the 3C Group Security component (OPR_GRP_3C_TABLE).

You can select which 3C groups user IDs can view and update. The Campus Community 3C engine also uses the security that you set up here. The 3C engine does not process the user's request if the user does not have update access for the 3C value used in the process. 3C groups allow access to specific communication categories, checklist codes, and comment categories.

This section lists prerequisites and discusses how to grant 3C group security.

Prerequisite

Before you set up 3C group security, set up 3C groups and complete institution security setup.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Understanding the 3Cs—Communications, Checklists, and Comments"

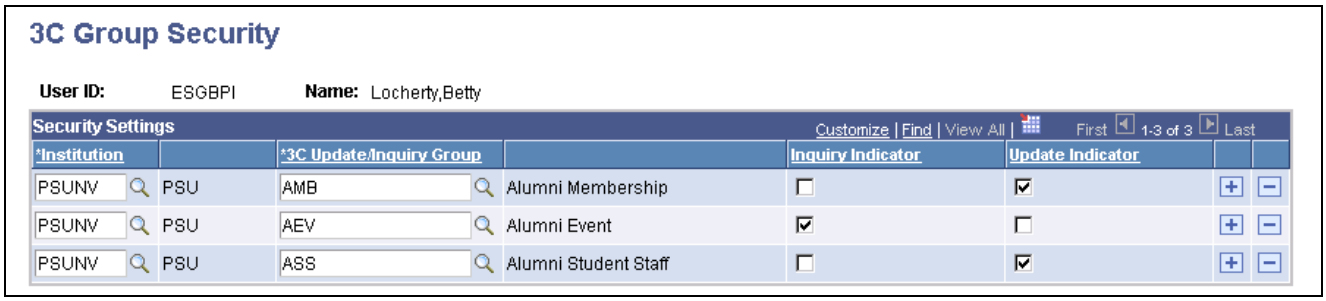
Chapter 11, "Securing Your Academic Institution," page 191

Page Used to Set Up 3C Group Security

Page Name	Object Name	Navigation	Usage
3C Group Security	OPR_GRP_3C_TABLE	Set Up SACR, Security, Secure Student Administration, User ID, 3C Group Security	Grant user access to 3C group information.

Granting 3C Group Security

Access the 3C Group Security page.



3C Group Security page

Institution Select an institution. Only institutions to which this user ID has access are available.

3C Update/Inquiry Group Select the 3C group that the user ID should have access to for the selected institution. The 3C groups are defined inside the Group 3C Table page (GRP_3C_TABLE page).

Inquiry Indicator Select to enable the user ID to *view* all data in the 3C group. The inquiry indicator is used to widen or narrow searches on 3C inquiry pages throughout the system. For example, a user that has inquiry access to a certain 3C group will only be able to view the communications, checklists, or a comments assigned to an individual or to an organization that is tied to the 3C group.

Update Indicator Select to enable the user ID to *update*—enter or alter—data in the 3C group. You should also select this check box if you want the user ID to be able to process 3C items by using the 3C engine. If the user ID does not have update access to the 3C group, the 3C engine does not process a request by using the 3C group. This is similar to the way the system manages manual assignments for communications, checklists, or comments.

Setting Up Service Indicator Security

To set up service indicator security, use the Service Indicator Security component (SCRTY_TABL_SRVC).

This section lists prerequisites and discusses how to grant access to service indicators.

Prerequisite

Before you set up service indicator security, set up service indicators in the Service Indicator table.

See Also

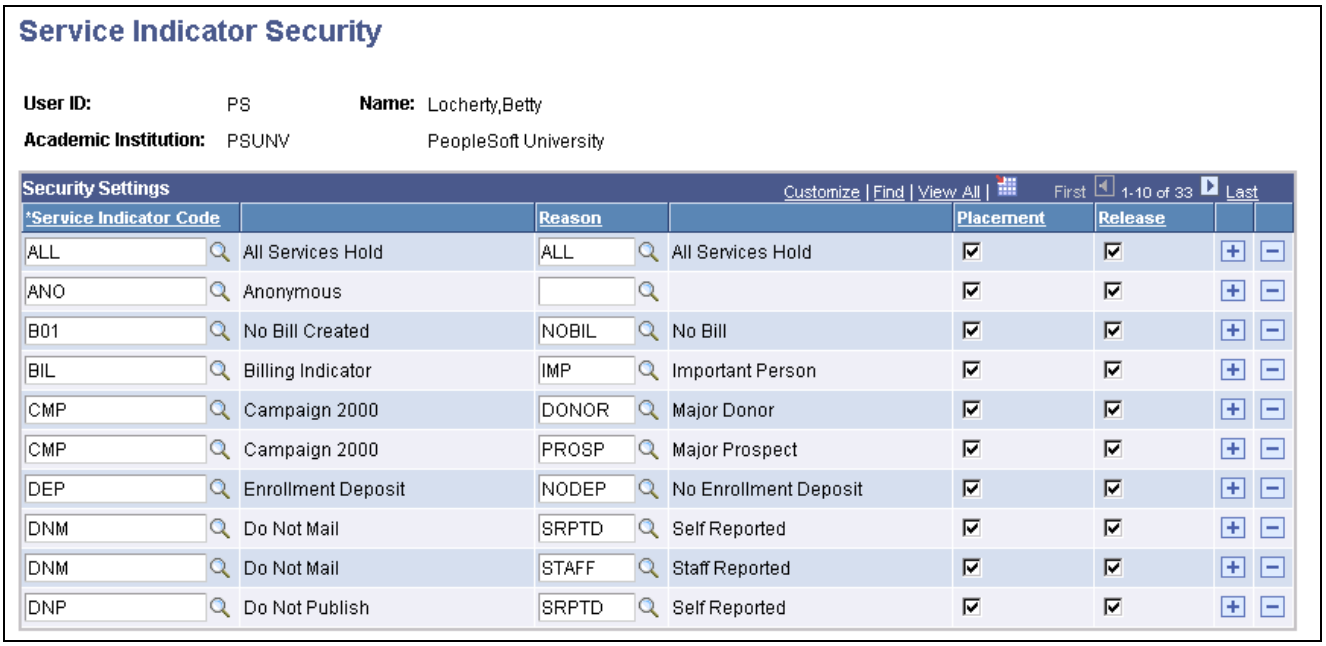
PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Service Indicators"

Page Used to Set Up Service Indicator Security

Page Name	Object Name	Navigation	Usage
Service Indicator Security	SCRTY_TABL_SRVC	Set Up SACR, Security, Secure Student Administration, User ID, Service Indicator Security	Grant access to service indicators for a user ID for a particular institution.

Granting Access to Service Indicators

Access the Service Indicator Security page.



Service Indicator Security page

Service Indicator Code Select a code for each service indicator that the user ID should be able to access. To restrict the use of a service indicator by reason, enter multiple rows for the service indicator and select the different reasons that apply. You define service indicator codes inside the Service Indicator Table.

Reason To limit the use of a service indicator code, select a reason indicating when the user ID can access the service indicator. If you do not select a reason, the user ID can use the service indicator in all cases.

For example, if this user ID should only be able to use the conference guest service indicator for football recruitment visits or Special Olympics guests, select each of those reasons for the conference guest service indicator. You define the reasons for using a service inside the Service Indicator Table.

Placement and **Release** Select if this user ID should have permission to assign or release the service indicator.

Copying User Security

To set up the copying of user security, use the User Security Replacement component (SCRTY_OPRID_REPLAC).

Copying a security setup is the same as going to each appropriate menu and entering data for each security object to assign security for a specific user. Replacement security automates the process for you by enabling you to copy a security profile to another user.

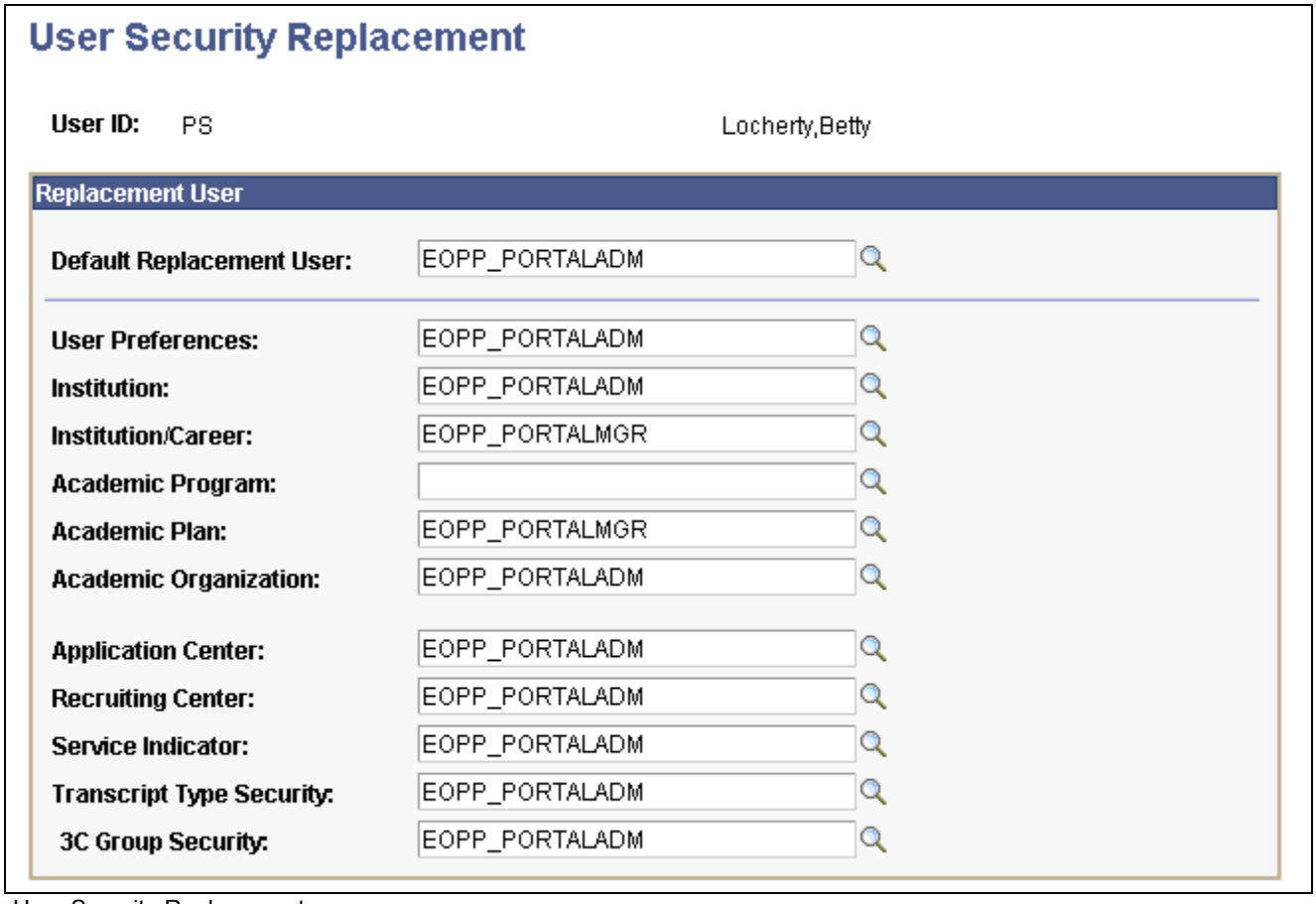
This section discusses how to copy user security setup.

Page Used to Copy User Security

Page Name	Object Name	Navigation	Usage
User Security Replacement	SCRTY_OPRID_REPLAC	Set Up SACR, Security, Secure Student Administration, Setup, User Security Replacement	Copy the security setup of one user to another user.

Copying User Security Setup

Access the User Security Replacement page.



User Security Replacement page

Default Replacement User To replace or create all of this user ID's security objects with the same security objects assigned to another user ID, specify the user whose security objects you want to copy in this field. When you exit the field, the system copies each security object from the replacement user and automatically populates the remaining fields with the replacement values.

If you do not want to replace each of this user's security objects with all the security objects of one user ID, indicate the replacement user ID for each object that you want to replace. You do not have to replace all objects. For those objects that you do not want to replace, leave the field blank.

User Preferences When you enter a user ID in this field, the default values that you set up in the User Default component for the entered user ID are assigned to the user ID, including the enrollment override defaults and user 3C group security.

User defaults are set up in the User Defaults component.

See Chapter 19, "Setting User Defaults," page 307.

When you enter a user ID in any of the other fields on this page, the user ID is assigned the same security that you set up for the selected user ID for that item. All of these fields refer to the security that you set up on the pages in Set Up SACR, Security, Secure Student Administration, User ID.

Applying Demographic Data Access Security

To set up demographic data access (DDA) security, use the Demographic Data Access component (PERS_MSK_CFG) and the Demographic Data Access process component (RUNCTL_MSK_CFG).

This section provides an overview of DDA security, setting up DDA security, and discusses how to:

- Define DDA masking configurations.
- Run the DDA process.

Understanding DDA Security

With DDA security, you can mask the display of national ID and birthdate data in search records, prompt records, and on the Bio/Demo Data and the Relationships pages if these pages have display-only security. You can mask the entire fields or the first five characters of the national ID field or the year of the birthdate field. You can apply masking to one, both, or neither field. No matter which masking configuration you use, users can search on the entire national ID field.

Note. You can make the masking of National ID and birthdate in Search/Match functionality become more flexible. See Search/Match display options. National ID and birthdate data is also not masked in queries and reports.

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

To apply DDA security, you define masking configurations for all primary permission lists and assign a primary permission list to each user ID as part of his or her User Profile.

For example, suppose a primary permission list assigned to a user ID is named ALLPANLS. You might not want national IDs to appear throughout the system for this permission list, but you do want partial birthdates to appear. You would access the Demographic Data Access setup page and insert a row for the ALLPANLS permission list. In that row, you would configure the system to 1) mask the entire national ID, and 2) to display a partial birthdate field (masking the year).

You must then run the Demographic Data Access (MSK_CFG) process to replace data in the masking configuration table with the masking configuration that you defined and to apply the new configuration to each user to whom that permission list is assigned.

In the example, after running the Demographic Data Access process, each user whose primary permission list is ALLPANLS will not see national IDs on search pages or prompts, but they will see the birth month and day where birthdates appear. The masking configuration for the primary permission list to which a user is assigned also controls how national ID and birthdate data appear on the Bio/Demo Data page (SCC_BIO_DEMO_PERS) and the Relationships page (RELATIONSHIPS) throughout the system.

Note. The national ID and the birthdate fields appear masked on the Biographical Details page and the Relationships page only for users who have security set to show the pages in display-only mode. If a user has more than one permission list and therefore has both add/update and display-only access to a masked page, the least restrictive setting (add/update) takes precedent and masking is not applied.

Setting Up DDA Security

To set up DDA security, you must assign a primary permission list to each user ID, grant administrative access to components for managing DDA, and define masking configurations for each primary permission list.

Note. All Campus Solutions search records and prompts depend on DDA security. You must therefore assign a primary permission list to each user, even to those who do not need the national ID and the birthdate fields masked. In the latter case, simply set the masking configurations in the primary permission list for both the National ID and the Date of Birth to *Display entire field*.

Pages Used to Apply DDA Security

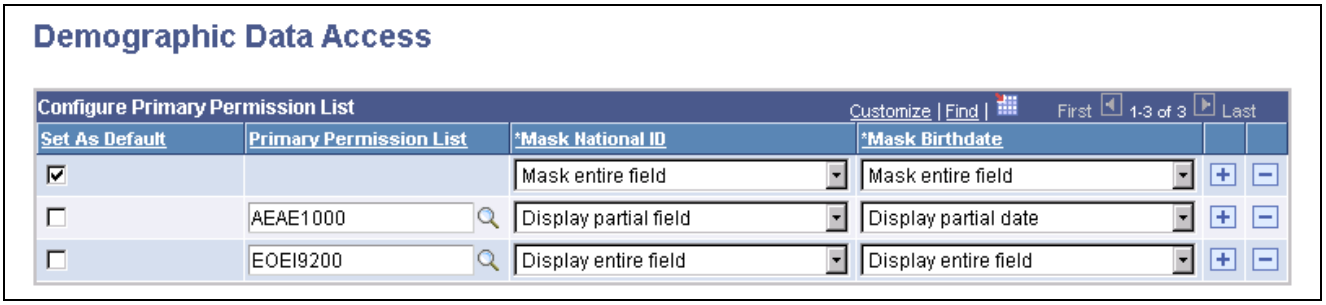
Page Name	Object Name	Navigation	Usage
General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Assign a primary permission list to a user ID.
Pages	ACL_MENU2	PeopleTools, Security, Permissions & Roles, Permission Lists, Pages	Grant access to new components for managing DDA masking configurations for each primary permission list. Grant access to new Student components for users that should prompt only against Students.
Demographic Data Access (setup)	PERS_MSK_CFG	Set Up SACR, Security, Secure Student Administration, Permission List, Demographic Data Access	Define masking configurations for primary permission lists.
Demographic Data Access (run control)	RUNCNTL_MSK_CFG	Set Up SACR, Security, Secure Student Administration, Process, Demographic Data Access	Initialize the primary permission list configuration for all primary permission lists assigned to users.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up User Profiles" and "Working with Permission Lists"

Defining DDA Masking Configurations

Access the Demographic Data Access (setup) page.



Demographic Data Access setup page

Important! Each time you make changes to the Demographic Data Access page, you must run the DDA process to apply the changes.

Set as Default Select to assign this masking configuration to all permission lists used as primary permission lists.

When selected, the Primary Permission List field becomes unavailable.

Primary Permission List Insert a row for each primary permission list that requires a masking configuration different than the default masking configuration.

When you run the process, the system applies this masking configuration to all users to whom this primary permission list is assigned.

Mask National ID Enter the configuration to use for national IDs. Options are *Display entire field*, *Display partial field*, and *Mask entire field*.

If you display a partial field, the system masks the first five characters of the national ID field.

These translate values should not be modified.

Mask Birthdate Enter the configuration to use for birthdates. Options are *Display entire field*, *Display partial date*, and *Mask entire field*.

If you display a partial date, the system masks the year and displays month and day in the default date format for each birthdate field.

These translate values should not be modified.

Running the DDA Process

Access the Demographic Data Access (run control) page.

Demographic Data Access (run control) page

You must run the DDA process (MSK_CFG) to apply changes made on the Demographic Data Access (setup) page and to apply the default masking configuration to any newly created, newly assigned primary permission list whose masking configuration is not otherwise defined.

Note. The process applies the masking configuration only for permission lists that are used as "primary" permission lists. Therefore if you assign a User ID a primary permission list that was not used as primary the last time the DDA process was run, you will need to run the process again.

CHAPTER 13

Securing Recruiting and Admissions

This chapter provides an overview of PeopleSoft Enterprise Recruiting and Admissions security and discusses how to:

- Set security for recruiting centers.
- Set security for application centers.
- Set security for admissions actions.
- Set security for test IDs.

Understanding Recruiting and Admissions Security

This section lists common elements and discusses recruiting and admissions security.

Common Elements Used in This Chapter

Access Code This is set to *Read/Write,* which gives both read and write access to the user.

All Access Click this button to assign access to all recruiting centers, application centers, admissions program actions, or test IDs for the selected user ID and institution combination.

Recruiting and Admissions Security

You secure prospect data through the recruiting center, and you secure applicant data through the application center. Access to prospect data or applicant data is given to a user ID by granting access to specified recruiting centers or application centers. If the user ID is not associated with a particular recruiting center, the user ID cannot access prospect data associated with that recruiting center. The same is true for accessing applicant data for a particular application center. You also give access to user IDs for specific program actions, which are associated with recruiting and admissions. In addition, you grant users access to test IDs to control the users who can work with external test data.

Setting Security for Recruiting Centers

To set up recruiting center security, use the Recruiting Center Security component (SCRTY_RECR_CENTER).

This section lists prerequisites and discusses how to assign recruiting center access.

Prerequisites

Before you set security for recruiting centers:

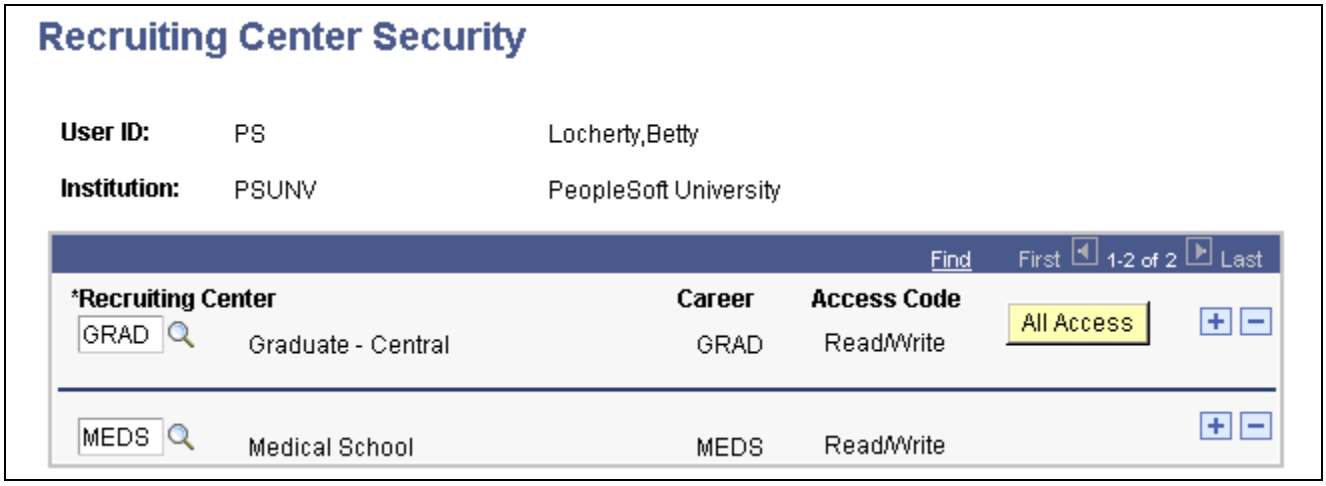
- Set up academic institutions and recruiting centers.
- Set up institution security.
- Set up institution and career security.

Page Used to Set Security for Recruiting Centers

Page Name	Object Name	Navigation	Usage
Recruiting Center Security	SCRTY_RECR_CENTER	Set Up SACR, Security, Secure Student Administration, User ID, Recruiting Center Security	Assign recruiting center access to a specified user ID for an institution.

Assigning Recruiting Center Access

Access the Recruiting Center Security page.



Recruiting Center Security page

Select a recruiting center that the combination of user ID and institution can access. The career associated with the recruiting center appears if you added it when you set up the recruiting center.

Setting Security for Application Centers

To set up application center security, use the Application Center Security component (SCRTY_APPL_CENTER).

This section lists prerequisites and discusses how to assign application center access.

Prerequisites

Before you set security for application centers:

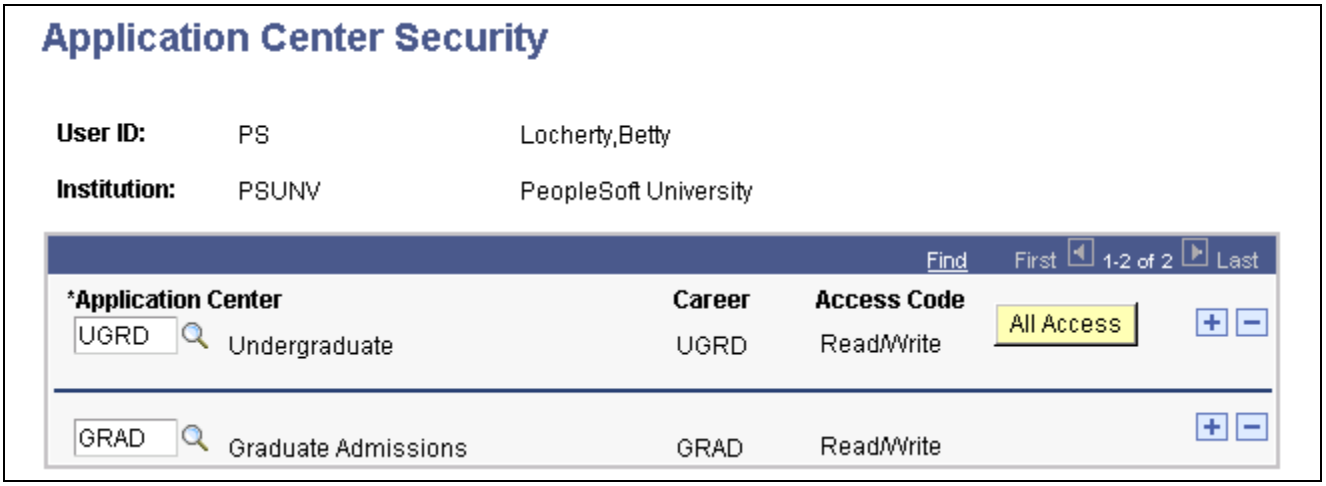
- Set up academic institutions and application centers.
- Set up institution security.

Page Used to Set Security for Application Centers

Page Name	Object Name	Navigation	Usage
Application Center Security	SCRTY_APPL_CENTER	Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security	Assign application center access to a specified user ID for an institution.

Assigning Application Center Access

Access the Application Center Security page.



Application Center Security page

Select an application center that the combination of user ID and institution can access. The career associated with the application center appears if you added it when you set up the application center.

Setting Security for Admissions Actions

To set up admissions actions security, use the Admissions Action Security component (SCRTY_ADM_ACTION).

This section lists a prerequisite and discusses how to assign program action security.

Prerequisite

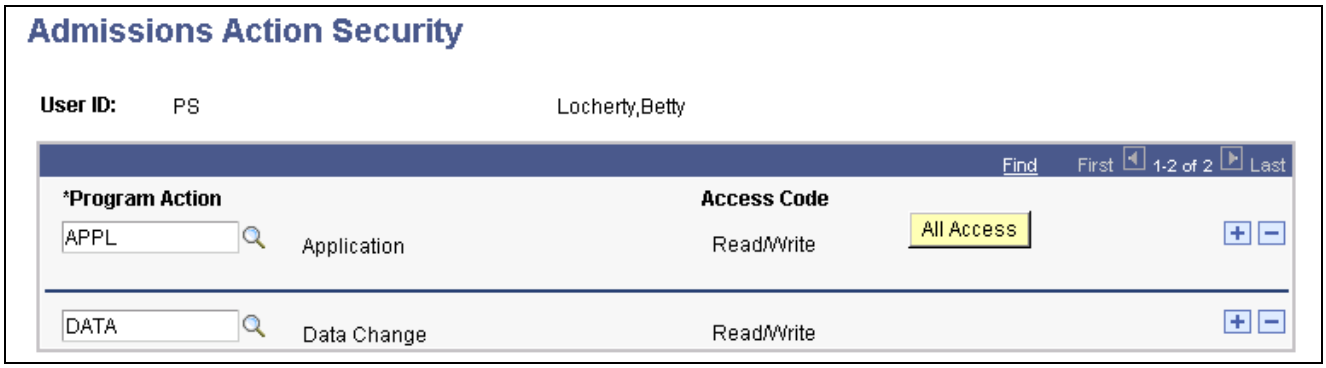
Before you set security for admissions actions, set up program actions.

Page Used to Set Security for Admissions Actions

Page Name	Object Name	Navigation	Usage
Admissions Action Security	SCRTY_ADM_ACTION	Set Up SACR, Security, Secure Student Administration, User ID, Admissions Action Security	Assign the admissions program actions that a user ID can access. Users have access only to the program actions entered on this page. Only program actions used by Recruiting and Admissions are available. These program actions are entered on Add Application, Maintain Applications, Action/Reason Entry and Program Addition.

Assigning Program Action Security

Access the Admissions Action Security page.



Admissions Action Security page

Select a program action that the user ID can access.

Setting Security for Test IDs

To set up test ID security, use the Test ID Security component (SAD_TEST_SCTY).

This section lists provides an overview of test ID security and discusses how to assign program action security.

Understanding Test ID Security

User ID based security for test IDs now ensures users access and process only the test data for which they have permission. Because the menus for the Load Processes and the Suspense pages have been consolidated, users must enter a test ID in order to access the correct pages. This security will also determine what test scores the user will see on Test Results and Academic Test Summary.

Selections of the test IDs for which a user has Read/Write security can be made through the Test ID Security page. The system enforces test ID security on the following components:

- Test Results component
- Academic Test Summary component
- External Test Score Load component
- External Test Score Suspense component
- Search/Match/Post Test Scores component
- Test Score Candidate Data component
- External Test Score Purge component

For example, to review suspense data, users navigate to the External Test Score Suspense component. To review posted test data, users navigate to the Test Score Candidate Data component. Users enter the test ID that they want to review (and for which they have test ID security), and the appropriate pages appear based on the test ID.

Prerequisites

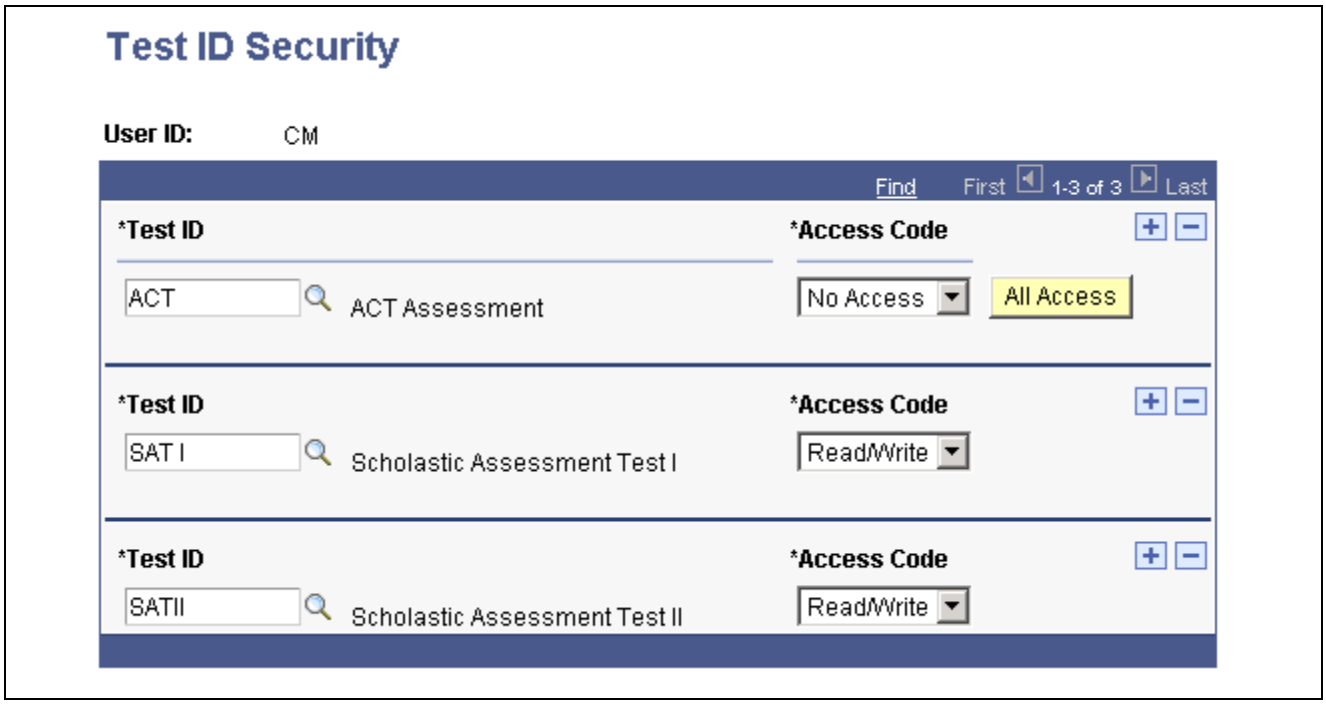
Before you can assign test ID security, you must define test IDs on the Test Tables page.

Page Used to Assign Security for Test IDs

Page Name	Object Name	Navigation	Usage
Test ID Security	SAD_TEST_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, Test ID Security	Assign the test IDs that a user can access. The system enforces test ID security in several components throughout the system.

Assigning Test ID Security

Access the Test ID Security page.



Test ID Security page

Test ID Select a test ID to grant or limit access to it. You define test IDs on the Test Tables page.

CHAPTER 14

Securing Student Records

This chapter provides an overview of PeopleSoft Enterprise Student Records security and discusses how to:

- Set up enrollment access IDs.
- Set up enrollment access groups.
- Set up enrollment security for user IDs.
- Set up enrollment security for self-service enrollment.
- Set security for program actions.
- Set security for transcript types.

Understanding Student Records Security

Student Records security setup includes access to enrollment, program actions, and transcript types. You enable security for program actions and transcript types by specifying which program actions and transcript types a user ID is allowed to access.

Enrollment security is more complicated and includes setting up enrollment access IDs and enrollment access groups. An enrollment access ID determines the time period when a user can perform certain enrollment functions and the type of overrides to which a user has access. An enrollment access group determines which types of students a user can enroll. It also controls the courses in which a user can enroll a student. You can add enrollment access IDs to enrollment access groups to limit the time period when the user can perform enrollment functions for the types of students.

Enrollment access IDs or enrollment access groups are assigned to user IDs for administrative users. For student self-service users, you assign enrollment access IDs to permission lists, which are assigned to students.

Prerequisites

Before you set up enrollment access IDs, for each term within academic career, you must:

- Set up the time periods and associate them with sessions.

  Several time periods are delivered with the PeopleSoft system, and you can add other time periods if needed.
- Set up valid time periods for every academic career on the Time Period Table page.
- Attach time periods to sessions and specify the dates for each time period for the sessions within a term on the Session Time Periods page.

See Also

Chapter 6, “Establishing Terms and Sessions,” Defining Session Time Periods, page 126

Setting Up Enrollment Access IDs

To set up enrollment access IDs, use the Enrollment Security Table component (SAD_TEST_SCTY).

Enrollment access IDs determine when users can perform certain enrollment functions during a specified time period. For example, you can allow advisors to enroll students in classes only during the first two weeks of classes. Enrollment access IDs can also include overrides to allow the user to override certain enrollment rules—for example, to override a class size limit. You assign enrollment access IDs to user IDs for administrative users and to permission lists for student self-service users.

Set up enrollment access IDs for the different groups of people who work with student enrollment. Create groups based on the different type of access that the people in these groups should have for each enrollment function. Groups might include advisors, clerks in the registrar's office, and registrar staff. Each group should have different types of access. You must also create enrollment access IDs to be used specifically for self-service enrollment.

This section discusses how to:

- Define access for enrollment functions.
- Define enrollment overrides.

See Also

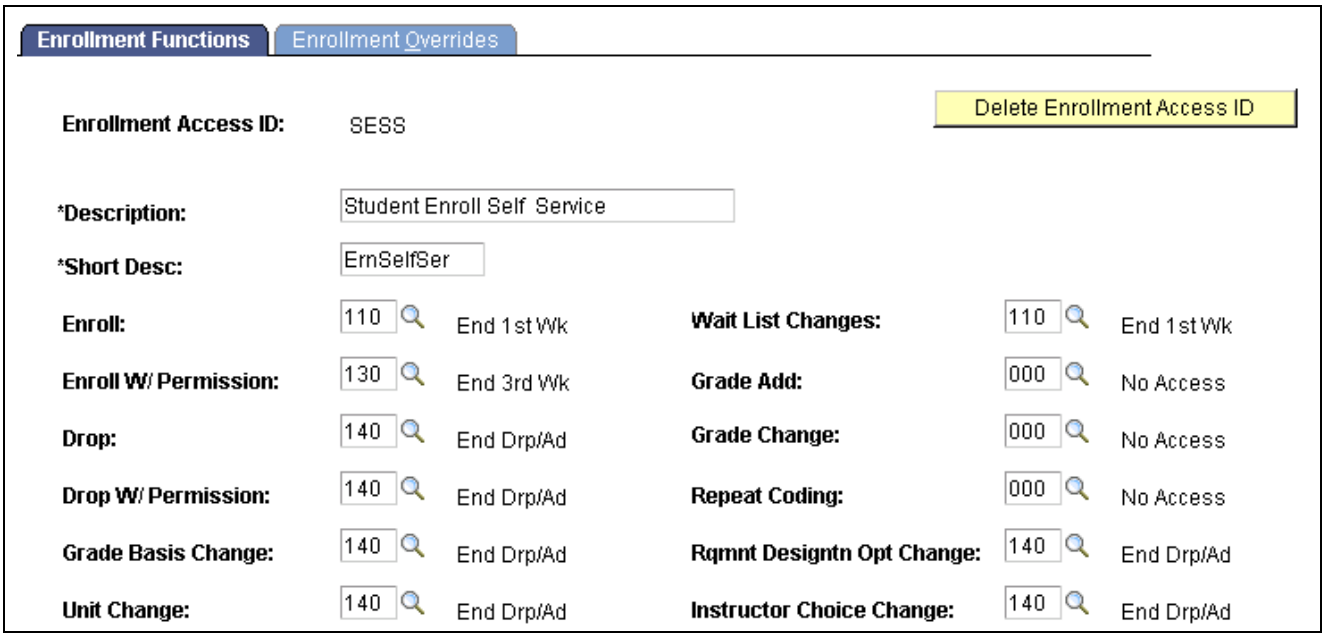
Chapter 14, "Securing Student Records," Setting Up Enrollment Security for Self-Service Enrollment, page 244

Pages Used to Set Up Enrollment Access IDs

Page Name	Object Name	Navigation	Usage
Enrollment Functions	ENRMT_OVRD_TBL	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Functions	Define access for enrollment functions by creating enrollment access IDs and assigning time periods to various enrollment functions. The time periods define when the enrollment access IDs can access each function. You attach these enrollment access IDs to user IDs, permission lists, and enrollment access groups.
Enrollment Overrides	ENRMT_OVRD_TBL2	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Overrides	Define the enrollment overrides that the enrollment access ID can use.

Defining Access for Enrollment Functions

Access the Enrollment Functions page.



Enrollment Functions page

For each enrollment access ID that you create, you grant access to enrollment functions by attaching a time period code to each enrollment function. Time period codes determine when the enrollment access ID has access to the specific enrollment action. Use time period code *999* to grant unrestricted access, and use time period code *000* to give no access.

Enroll Enter a time period code for enrolling a student.

Enroll W/Permission (enroll with permission) Enter a time period code for enrolling a student in a class after the regular enrollment period is over. A student needs permission to enroll in this period.

Important! If you set the Enroll W/Permission field to time period *999* (unrestricted time access), the system always grants access to a user connected to this enrollment access ID when that user attempts to enroll with or without permission, regardless of the time period associated with the Enroll field.

Drop Enter a time period code for dropping a student.

Drop W/Permission (drop with permission) Functionality to verify permission when dropping a student is not currently available. Use this field to assign two drop deadline periods. The later time period in the Drop or Drop W/Permission field is the effective drop deadline.

Grade Basis Change Enter a time period code for changing a student's grading basis for a class.

Unit Change Enter a time period code for changing units.

Wait List Changes Enter a time period code for changing to a student's waiting list position.

Grade Add Enter a time period code for adding a grade for a student.

Grade Change Enter a timer period code for changing a grade for a student.

Repeat Coding Enter a time period code for attaching a repeat code to a student for a class. The repeat code is found on the enrollment processing pages.

Rqmnt Designtn Opt Change (requirement designation option change)	Enter a time period code for changing requirement designations for a student's class.
Instructor Choice Change	Enter a time period code for changing instructors for a class, if this option is set up for the class.
Delete Enrollment Access ID	Click to delete this enrollment access ID. After you click the button, you can still cancel the deletion.

Processing Steps

When the enrollment engine verifies that a user can perform a certain enrollment function, it takes these steps:

- Retrieves the user's enrollment access ID.
- Checks which enrollment function the user is trying to complete, such as enroll, drop, and so on.
- Applies the time period associated with the enrollment function on the Enrollment Functions page, using the user's enrollment access ID.

  The enrollment engine also evaluates the overrides to which a user has access.
- Accesses the Session table and retrieves the end date for the time period.
- Compares the system date with the end date for the time period.

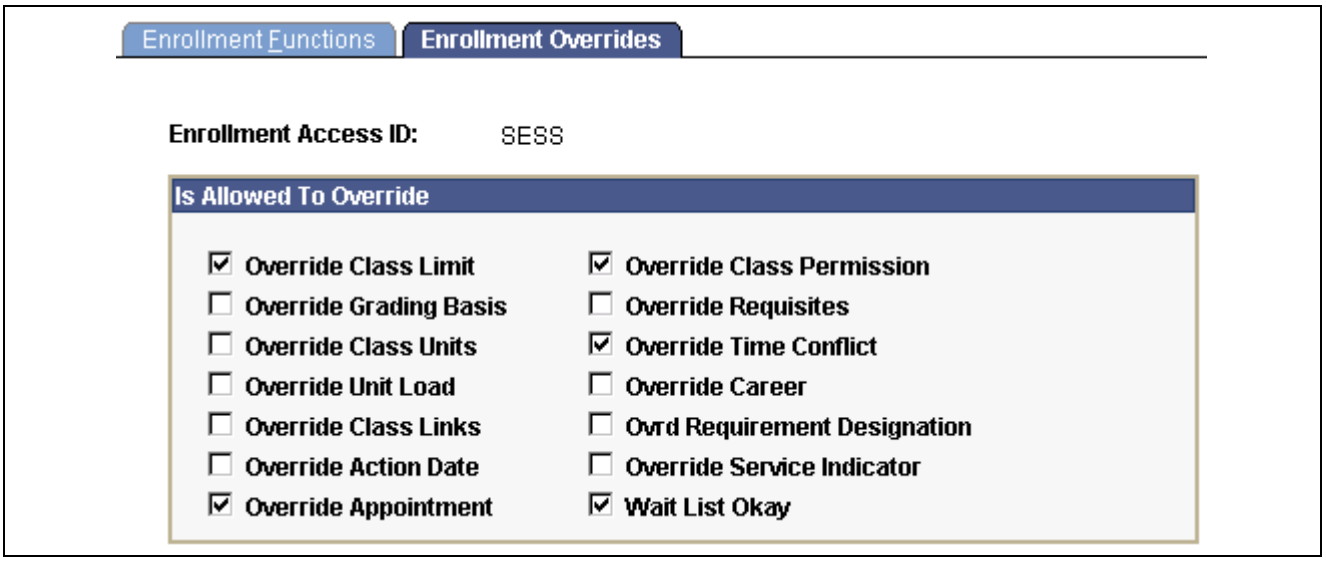
  If the system date is less than or equal to the end date for the time period, the system grants access for the enrollment function.

Example

Suppose that you want to enroll a student in a class scheduled in the regular academic session. The regular academic session time period 110 has an end date of August 29, 2005. If the action date for the enrollment is greater than August 29, 2005, the system denies access to the enrollment function. If you have defined an enroll-with-permission time period (for example, time period 120), the system requires permission for enrollment.

Defining Enrollment Overrides

Access the Enrollment Overrides page.



Enrollment Overrides page

Select the override options that the enrollment access ID is permitted to use. The overrides that you select here are used on the Enrollment Request page for users assigned the enrollment access ID.

Override Class Limit Select to allow enrollment in classes that are closed due to capacity size (full class section, combined section, or reserve capacity sizes). Also select to allow placing a student on the waiting list if waiting list capacity is full.

Override Grading Basis Select to allow override of the grading basis established for the class.

Override Class Units Select to allow override of course units for either fixed or variable units.

Override Unit Load Select to allow override of any unit limits, minimum or maximum. These include unit load for appointment, term and session unit load, term and session course count load, term and session *No GPA* units, term and session *Audit* units, wait list units, and the minimum unit enrollment verification.

Override Class Links Select to allow an add or drop without all the required related component sections in a class association group. Select also to allow enrollment into a nonenrollment type section and to allow multiple enrollments in a course.

Override Action Date Select to make the Action Date field available so you can enter a different processing date.

Override Appointment Select to allow override of appointment date and time to change the appointment maximum enrollment units.

Override Class Permission Select to allow override of class consent—for general permission or student-specific permission—to enroll in a class.

Override Requisites Select to allow override of requisite checking.

Override Time Conflict Select to allow override of class section time conflict checking.

Override Career Select to allow override of academic career pointers and career pointer exception rules.

Ovrd Requirement Designation (override requirement designation) Select to allow adding a requirement designation for a class that does not have one. Also, select to allow omitting a requirement designation that is required.

Override Service Indicator	Select to allow override of any holds that the student has so that enrollment is allowed.
Wait List Okay	Select to allow the addition of a student to the waiting list of a class section when the class section, combined section, or reserve capacity is full.

Setting Up Enrollment Access Groups

To set up enrollment access groups, use the Enrollment Group Access component (ENRL_GROUP_ACCESS).

This section provides an overview of enrollment access groups and discusses how to:

- Define students for enrollment group access.
- Define access to courses and assign enrollment access IDs.

Understanding Enrollment Access Groups

You use enrollment access groups to allow or restrict enrollment access to groups of students; for example, undergraduate athletes or students in the law career. You can define student groups using any combination of academic institutions, academic careers, academic programs, academic plans, and student groups. You can further restrict enrollment for the student group by assigning enrollment access IDs to limit the time periods when certain enrollment functions are allowed. In addition, you can restrict the enrollment for the student group to courses from a certain academic organization, to specific course catalog numbers, or to specific sessions.

You can also set up enrollment access groups that deny access to a particular group of students or that deny enrollment to particular courses—for example, courses of a particular academic organization, courses with particular catalog numbers, or courses in particular sessions. If you set up an enrollment access group that denies access to groups of students, that enrollment access group cannot be used to provide access to a different group of students. Similarly, if you deny access to particular types of courses for groups of students, you cannot add other rules that allow access to those types of courses.

Prerequisites

Before you can set up enrollment access groups, you must:

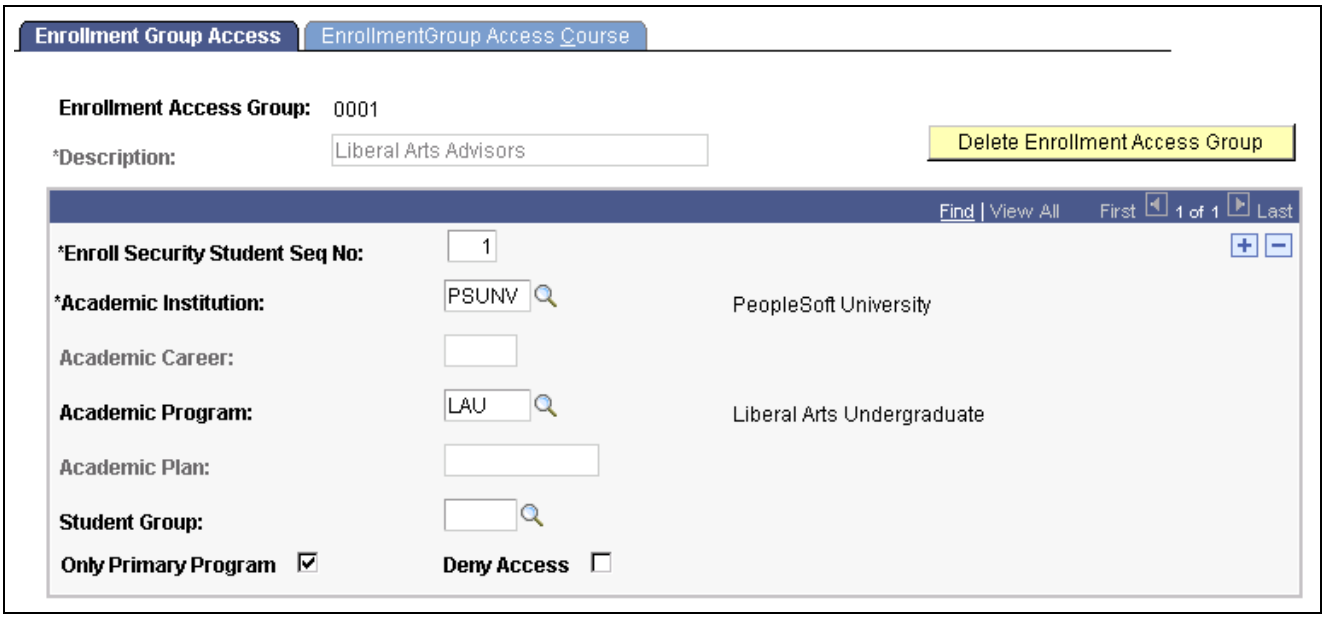
- Set up the academic institutions, academic careers, academic programs, academic plans, and student groups.
- Set up enrollment access IDs, academic organizations, course catalog, and session information.

Pages Used to Set Up Enrollment Access Groups

Page Name	Object Name	Navigation	Usage
Enrollment Group Access	ENRL_GROUP_ACCESS	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access	Define students for enrollment group access.
EnrollmentGroup Access Course	ENRL_GROUP_ACCESS2	Set Up SACR, Security, Secure Student Administration, Setup, Enrollment Group Access, EnrollmentGroup Access Course	Define access to courses for the student group created on the Enrollment Group Access page. You can also assign an enrollment access ID to the student group.

Defining Students for Enrollment Group Access

Access the Enrollment Group Access page.



Enrollment Group Access page

Description Enter the description for the enrollment access group. You can only enter a description in this field for a new value. After the page is saved, you cannot change the description.

Delete Enrollment Access Group Click to delete this enrollment access group. After you click the button, you can still cancel the deletion.

Enroll Security Student Seq No (enrollment security student sequence number) Displays a counter for each group of students that you define. When you insert additional rows to define parameters for additional student groups, the number increments by one. This field appears on the Enrollment Group Access Course page so that you can define the course information for each group.

Academic Institution Select the academic institution that this enrollment access group can access.

Academic Career Select the academic career within the selected academic institution that this enrollment access group can access. If you select an academic career, you cannot select an academic program or academic plan.

Academic Program Select the academic program within the selected academic institution that this enrollment access group can access. If you select an academic program, you cannot select an academic career or academic plan.

Academic Plan Select the academic plan within the selected academic institution that this enrollment access group can access. If you select an academic plan, you cannot select an academic career or academic program.

Note. You can specify only an academic career, an academic program, *or* an academic plan. You cannot specify a combination of these.

Student Group Select the student group that this enrollment access group can access. You define student groups in Student Records.

Only Primary Program Select to grant access only to students whose primary academic program matches the academic program selected. If you select this check box, the user cannot access students whose secondary academic program matches the academic program selected.

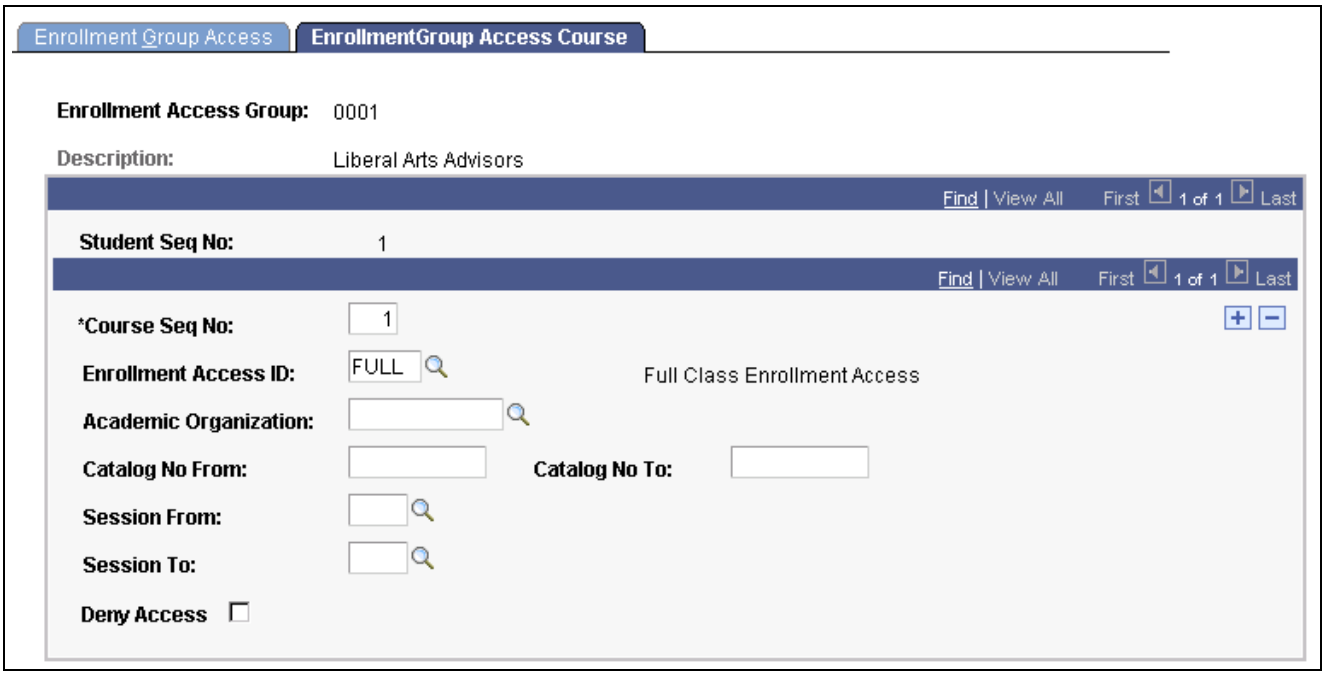
This check box is available only if you entered a value in the Academic Program field.

Deny Access Select to deny access to the specified group of students. If you select Deny Access for one group of students (identified by the enrollment security student sequence number), you deny access for any subsequent groups of students that you define for the enrollment access group.

Warning! When this page is saved, the selected access for the enrollment access group becomes effective immediately.

Defining Access to Courses and Assigning Enrollment Access IDs

Access the EnrollmentGroup Access Course page.



EnrollmentGroup Access Course page

Student Seq No (student sequence number)

Displays the enrollment security student sequence number. This is the same field used to count the student groups defined on the Enrollment Group Access page. For each student group, you can define different parameters.

Course Seq No (course sequence number)

This counts each set of parameters for course enrollment—enrollment access ID, academic organization, catalog numbers, and sessions—for each student sequence number.

For example, for a particular group of students, you might allow enrollment in two academic organizations. In this case, you would have two course sequence numbers, one to define each academic organization.

Enrollment Access ID

Enter an enrollment access ID if you want to attach a defined set of allowable enrollment functions and overrides to the enrollment access group. You define enrollment Access IDs on the Enrollment Functions page.

The Enrollment Access ID is not a required field. If you do not enter an enrollment access ID on this page, all enrollment functions are allowed for all time periods during the session for the students and courses specified for the enrollment group access.

Note. You can select any combination of the Enrollment Access ID field, the Academic Organization field, the Catalog No From (catalog number from) field, the Catalog No To (catalog number to) field, the Session From field and the Session To field. Each of these fields creates different parameters for limiting enrollment of the student group.

Academic Organization

Select an academic organization in which you want to allow the student group to enroll. If you do not select any value, then the student group can be enrolled in classes in any academic organization, unless you specify a catalog number range.

Catalog No From (catalog number from), and **Catalog No To** (catalog number to)

Select the catalog number range in which you want to allow the student group to enroll. Entering a catalog number range allows students in the defined student group to enroll in courses within the range.

If you want to include more than one range of catalog numbers, add another row to define the second catalog number range.

Session From and **Session To**

Select the session range in which you want to allow the student group to enroll. You can include more than one range of sessions by adding a row.

Deny Access

Select to prevent enrollment in the selected parameters. For example, if you select the Deny Access check box, the range of the courses selected are the courses in which the student group *cannot* be enrolled. All other courses would be available.

If you select the Deny Access check box for one course sequence number, select it for any subsequent course sequence numbers that you define for the student group. Each student group has its own student sequence number.

Note. You do not need to select an enrollment access ID if you select the Deny Access check box because you are denying access for all time periods and functions.

Warning! When this page is saved, the selected access for the enrollment access group becomes effective immediately.

Setting Up Enrollment Security for User IDs

To set up user ID enrollment security, use the Enrollment Security component (OPR_SA_ACCESS).

This section lists prerequisites and discusses how to define enrollment security for user IDs.

Prerequisites

Before you can create enrollment security for user IDs, you must set up enrollment access IDs and enrollment access groups.

See Also

Chapter 14, “Securing Student Records,” Setting Up Enrollment Access IDs, page 234

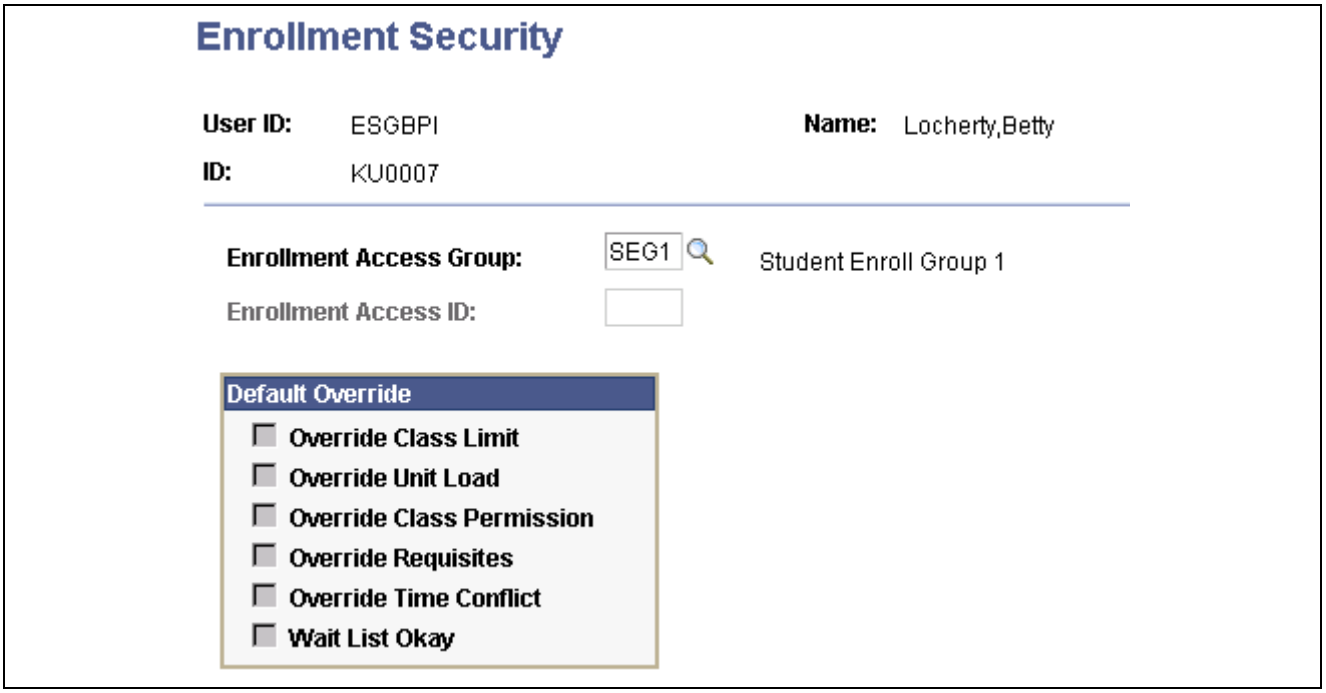
Chapter 14, “Securing Student Records,” Setting Up Enrollment Access Groups, page 238

Page Used to Create Enrollment Security for User IDs

Page Name	Object Name	Navigation	Usage
Enrollment Security	OPR_SA_ACCESS	Set Up SACR, Security, Secure Student Administration, User ID, Enrollment Security	Define enrollment security for user IDs by assigning either an enrollment access group or an enrollment access ID to a specific user ID. Also, assign additional default enrollment overrides.

Defining Enrollment Security for User IDs

Access the Enrollment Security page.



Enrollment Security page

You can grant a user ID enrollment access by enrollment access group *or* by enrollment access ID, but not both.

Enrollment Access Group Select an enrollment access group to grant the user ID access to enrollment for specific groups of students. The Default Override group box is not available if you select an enrollment access group.

Note. When a user's enrollment security is controlled by an enrollment access group, override security is enforced when an enrollment request is processed by the enrollment engine.

Enrollment Access ID Select an enrollment access ID to grant the user ID access to enrollment functions during specific time periods within the session. When you select an enrollment access ID and exit the field, the system checks against the ENRMT_OVRD_TBL and makes available the overrides allowed for the selected enrollment access ID.

Note. When a user's enrollment security is controlled by enrollment access ID, only those overrides that have been authorized are available for use on the Enrollment Request page and the Quick Enroll page.

Default Override

If you are granting the user ID access by enrollment access ID, select the override options that you want to set as default overrides for the user ID. You can select only those default overrides that are allowed for the enrollment access ID. The override defaults are available on enrollment pages.

See Also

Chapter 14, "Securing Student Records," Setting Up Enrollment Access IDs, page 234

Chapter 14, "Securing Student Records," Defining Enrollment Overrides, page 236

Setting Up Enrollment Security for Self-Service Enrollment

To set up self-service enrollment security, use the Self-Serv Enrollment Perm List component (SA_SS_ENRL_PERM) and the Enrollment Security component (OPRCLASS_SA_ACCESS).

This section provides an overview of self-service enrollment security, lists prerequisites, and discusses how to:

- Define self-service enrollment permission lists.
- Assign enrollment access to permission lists.

Understanding Self-Service Enrollment Security

When a student selects a term for enrollment, the system displays the View My Schedule page. At this point, PeopleCode enables the system to evaluate the roles attached to the student's user ID. The self-service enrollment permission list defined on the Self Service Enrollment Permission List Definition page must be attached to the student's roles. The search is conducted using the institution and term combination that the student selects on the term listing page.

For example, suppose that a student selects the Fall 2005 term at PSUNV. The system searches all of the roles attached to the user ID and determines whether the permission list named SASTDNT exists for PSUNV. If it does, the student is allowed to continue with the enrollment process. If the permission list is not found, the Add, Swap, and Update links are hidden and the system displays this message: "You are not authorized for self service enrollment at this time."

If a student passes the verification step, subsequent enrollment transactions are subject to enrollment engine security checks. When an enrollment request is submitted, the enrollment engine uses the enrollment access ID attached to the self-service permission list to evaluate time period security as usual.

Here's how to set up security for self-service enrollment:

1. Create a self-service permission list for student self-service enrollment on the Permission Lists page.

   (Select PeopleTools, Maintain Security, Use, Permission Lists to access the Permission Lists page.)
2. Create a role for student self-service in the Roles component.

(Select PeopleTools, Maintain Security, Use, Roles to access the Roles component.) Attach the permission list to this role.

3. Attach an enrollment access ID to the permission list using the Permission List – Enrollment Security page.
4. Specify the self-service enrollment permission List for the institution using the Self Service Enrollment Permission List page.

Prerequisites

Before you can set up self-service enrollment security, you must:

- Create the role for student self-service on the Roles page.
- Set up a self-service enrollment permission list on the Permission List page.
- Set up enrollment access IDs on the User ID – Enrollment Security page.

Pages Used to Set Up Enrollment Security for Self-Service Enrollment

Page Name	Object Name	Navigation	Usage
Self Service Enrollment Permission List Definition	SA_SS_ENRL_PERM	Set Up SACR, Security, Secure Student Administration, Permission List, Self-Serv Enrollment Perm List	Define self-service enrollment permission lists.
Permission List – Enrollment Security	OPRCLASS_DEF_SA	Set Up SACR, Security, Secure Student Administration, Permission List, Enrollment Security	Assign an enrollment access ID to a permission list. Permission lists are then assigned to students to give them access to self-service enrollment functions.

Defining Self-Service Enrollment Permission Lists

Access the Self Service Enrollment Permission List Definition page.

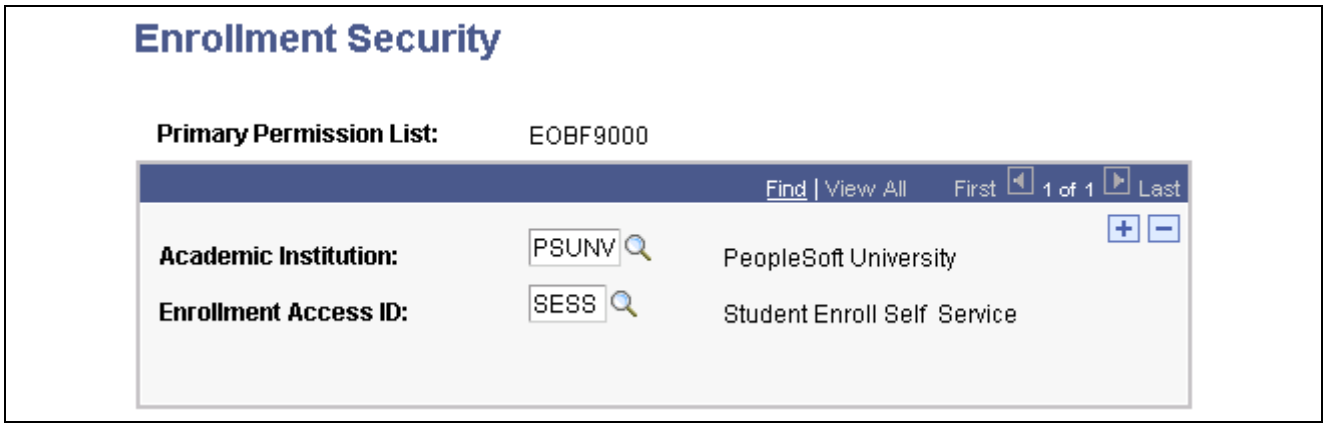
Self Service Enrollment Permission List Definition page

Permission List Select the self-service permission list that you created. The academic institution is associated with the permission list.

Delete Click to delete the academic institution and permission list combination defined on the page. In the preceding example, the PSUNV/SASTDNT row would be deleted from the table. A warning message appears when you click the Delete button.

Assigning Enrollment Access to Permission Lists

Access the Permission List – Enrollment Security page.



Permission List — Enrollment Security page

Academic Institution Select an academic institution that a student can access for self-service enrollment using this permission list.

Enrollment Access ID Select an enrollment access ID to allow students using this permission list to access the enrollment functions during the time periods specified in the enrollment access ID.

Setting Security for Program Actions

To set up program action security, use the Program Action Security component (SCRTY_PROG_ACTION).

This section lists a prerequisite and discusses how to define program action security.

Prerequisite

Before you can set up program action security, set up the program actions on the Program Action Table page.

See Also

Chapter 14, “Securing Student Records,” Setting Security for Program Actions, page 246

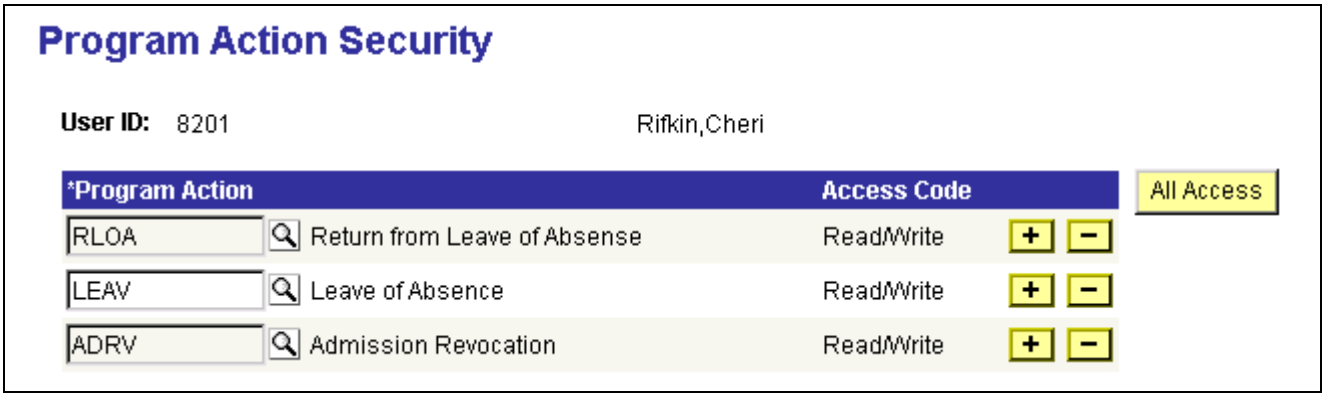
PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, “Setting Up Admissions Program Actions and Program Action Reasons,” Setting Up Admissions Program Actions and Program Action Reasons

Page Used to Set Security for Program Actions

Page Name	Object Name	Navigation	Usage
Program Action Security	SCRTY_PROG_ACTION	Set Up SACR, Security, Secure Student Administration, User ID, Program Action Security	Define program action security by assigning a user ID to specific program actions. If you do not give the user ID access to program actions on this page, the user ID cannot perform any program actions.

Defining Program Action Security

Access the Program Action Security page.



Program Action Security page

Program Action Select a program action that the user ID can access. The access code is set to *Read/Write.*

All Access Click to assign access to all program actions for the user ID.

Setting Security for Transcript Types

To set up transcript type security, use the Transcript Type Security component (SCRTY_TSCRPT_TYPE).

This section lists a prerequisite and discusses how to define transcript type security.

Prerequisite

Before you can define transcript type security, set up transcript types in the Transcript Type component.

Note. Transcript type security does not affect access to transcript types in PeopleSoft Learner Services or PeopleSoft Learning Management self-service applications.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Transcripts"

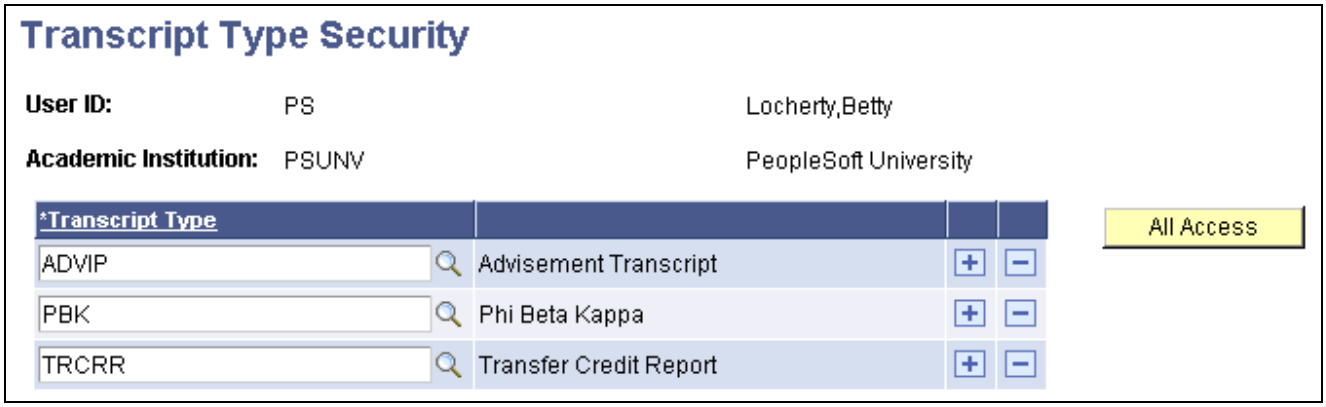
PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts"

Page Used to Set Security for Transcript Types

Page Name	Object Name	Navigation	Usage
Transcript Type Security	SCRTY_TSCRPT_TYPE	Set Up SACR, Security, Secure Student Administration, User ID, Transcript Type Security	Set transcript type security for a user ID and a particular institution.

Defining Transcript Type Security

Access the Transcript Type Security page.



Transcript Type Security page

When a user attempts to process a transcript on the Transcript Request page, the Batch Transcript Request page, or the Batch Transcript Generation page, the user can select only those transcript types for which they have security access.

Transcript Type Select a transcript type for which the combination of user ID and academic institution has processing access.

Note. It is recommended that you do not define a transcript type of *ALL* because the system uses this value to grant users access to all transcript types.

CHAPTER 15

Securing Student Financials

This chapter provides an overview of PeopleSoft Enterprise Student Financials security and discusses how to:

- Set security views.
- Set security options.
- Update Student Financials security settings.
- Set security for setIDs.
- Set security for business units and cashier offices.
- Set security for item types.
- Set security for institution sets.
- Override the self-service institution set.
- Set security for companies.
- Set security for origin IDs.
- Set security for credit cards.

Understanding Student Financials Security

In Student Financials you can set security for setIDs, business units, cashier offices, item types, institution sets, companies, origin IDs, and credit cards. For each of these items, you can select to have no security, user ID security, or permission list security. You can use any of the three types of security, and you do not need to use the same type of security throughout the application. For example, you could select no security for origin IDs, user ID security for business units, and permission list security for item types.

You use the Security Options page to select the type of security for setIDs, business units, item types, and so on. The type of security that you select for each item on the Security Options page determines which of the other pages in this section you must complete. You can secure each item by user ID or permission list.

If you select user ID security for an item on the Security Options page, complete the appropriate page by selecting Design Student Administration, Secure Student Financials, User ID.

If you select permission list security for an item on the Security Options page, complete the appropriate page by selecting Design Student Administration, Secure Student Financials, Perm List.

If you select no security for an item on the Security Options page, do not complete any other page for that item. All permission lists and user IDs can access all items when you select no security.

When you set security, you give either a user ID or a permission list access to the items that you list on the page. If you do not list the item on the page, the user ID or permission list does not have access to the item.

In these sections, you can set security for each item using a user ID page or a permission list page. Complete only one of these pages, depending on the type of security that you select on the Security Options page for the item.

Note. Student Financials security works in conjunction with any other security settings that you configure in the PeopleSoft system.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "User Profiles" and "Working with Permission Lists"

Setting Security Views

To set up security views, use the Security Views component (SECURITY_VIEWS).

Before completing the security setup, you should review the delivered security views. You can also add modified security views to the system

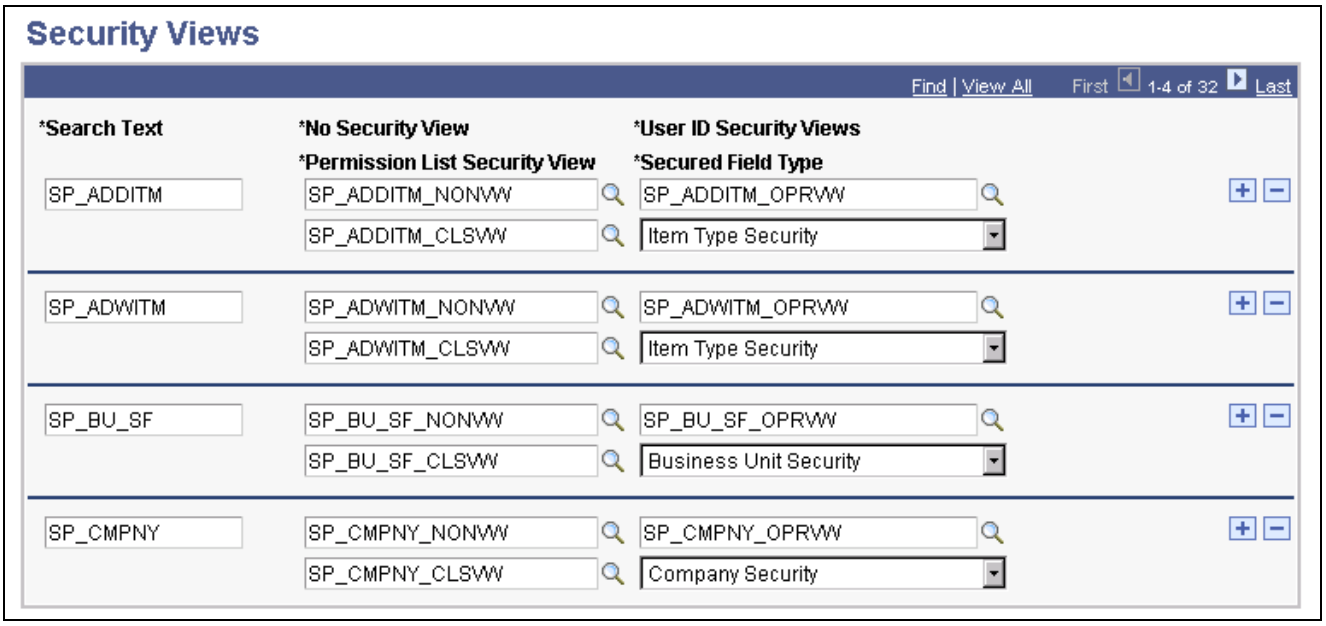
This section discusses how to review security views.

Page Used to Set Security Views

Page Name	Object Name	Navigation	Usage
Security Views	SECURITY_VIEWS	Set Up SACR, Security, Secure Student Financials, Setup, Security Views	Review the security views delivered with the PeopleSoft system. You can also add modified security views for the system.

Reviewing Security Views

Access the Security Views page.



Security Views page

Search Text Common identifier that relates to the view.

No Security View The view that runs when no security is set.

Permission List Security View The view that runs when security is set to permission list.

User ID Security Views The view that runs when security is set to user ID.

Secured Field Type When a prompt is on the field, one of the views runs depending on how security is set.

View Extensions

View names have one of three extensions:

- _NONVW indicates that the view has no security.
- _OPRVW indicates the view has user ID security.
- _CLSVW indicates the view has permission list security.

Setting Security Options

To set up security options, use the Security Options component (SECURITY_OPTIONS).

You can select no security, user ID security, or permission list security for the setID, business unit, credit card number, company, institution set, origin, and item type in Student Financials. After you make selections on the Security Options page, you use other pages to enter user IDs or permission lists to secure the selected items.

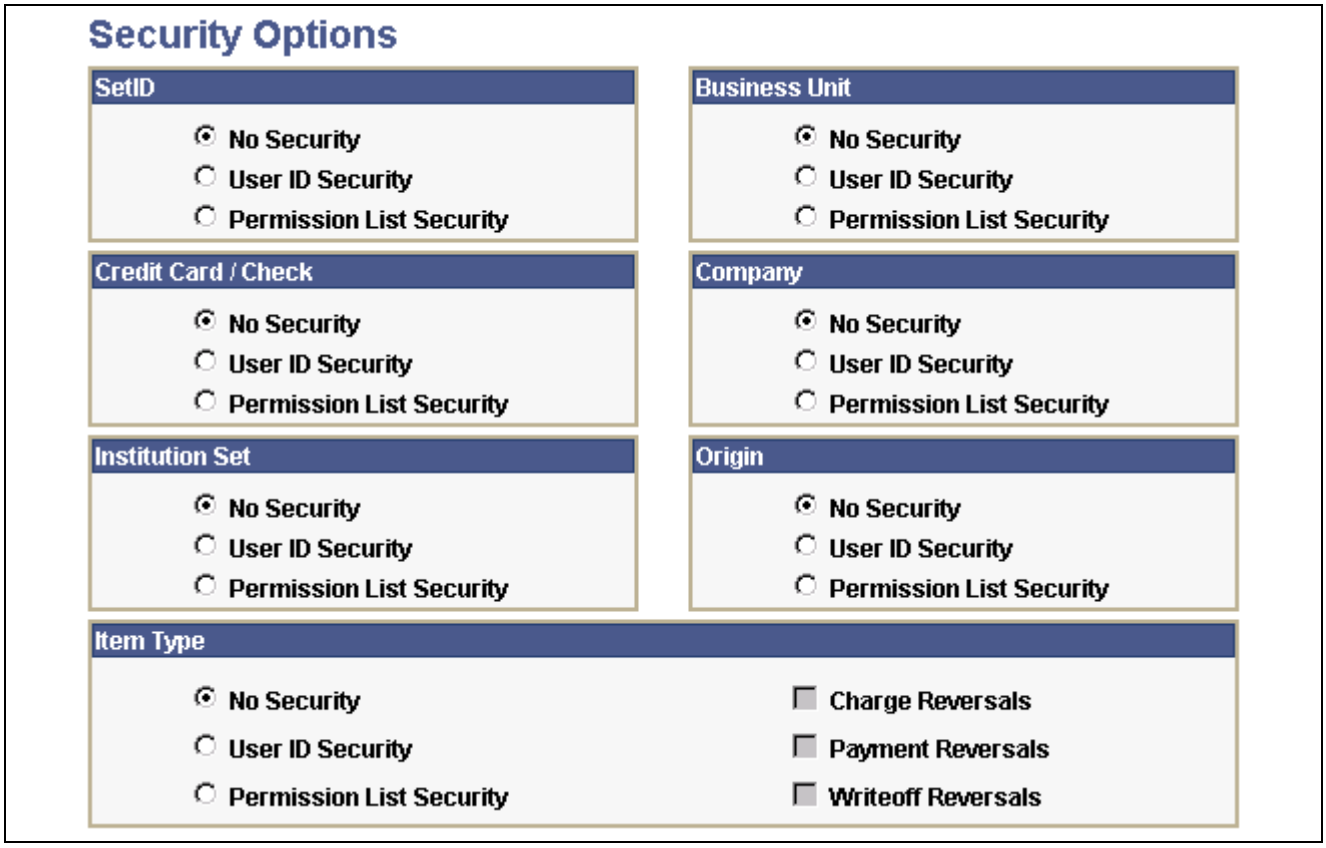
This section discusses how to select security options.

Page Used to Set Security Options

Page Name	Object Name	Navigation	Usage
Security Options	SCRTY_OPTIONS_SF	Set Up SACR, Security, Secure Student Financials, Setup, Security Options	Select the security options that you plan to implement and the key fields that you want to secure in Student Financials. **Note.** This page is not keyed by setID or business unit. The system implements the options that you select here throughout the system.

Selecting Security Options

Access the Security Options page.



Security Options page

SetID, Business Unit, Credit Card/Check, Company, Institution Set, and Origin

For each area, select the security option that you want:

Note. If you select No Security for Credit Card / Check, all users can view the entire credit card number. If you select User ID Security or Permission List Security, only users who are granted access can view the whole credit card number.

No Security Select to disable PeopleSoft application security. All users authorized to access a page can select any valid setID, business unit, credit card, company, institution set, origin, or item type. PeopleSoft applications are delivered with security disabled.

When you select this option, the system does not use any of the security setup that is described in these sections. Even if you enter information on the pages in these sections, the security is *not* implemented if you select the No Security option here.

User ID Security Select to enable PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by user ID. This chapter also discusses how to set up security for a user ID.

Permission List Security Select to enable PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by a permission list. All users in the permission list have the same security. This chapter also discusses how to set up security for permission lists.

Item Type

The following check boxes are available only if you select the User ID Security or Permission List Security options in the Item Type group box.

Charge Reversals Select to restrict the user to reverse only those item types that you define as charge item types.

Payment Reversals Select to restrict the user to reverse only those item types that you define as payment item types.

Writeoff Reversals Select to restrict the user to reverse only those item types that you define as write-off item types.

Updating Student Financials Security Settings

To set up Student Financials security, use the Set Security component (RUNCTL_SFSCRTY).

PeopleSoft delivers the Security Options page with no security set for each item on the page. The SF Load Security Views (Student Financials load security views) Application Engine process (SFRSCVW) that you run from this page updates system security with the selections on the Security Options page. You also must run this process if you change any of the other pages used for Student Financials security—for example, when you change information on the Permission List - Business Unit page. You do not need to run this process when you change credit card security options.

This section discusses how to update security for Student Financials.

Page Used to Update Student Financials Security Settings

Page Name	Object Name	Navigation	Usage
Set Security	RUNCTL_SFSCRTY	Set Up SACR, Security, Secure Student Financials, Process, Set Security	Run the SF Load Security Views SQR process (SFRSCVW) to update security changes and generate a security report.

Updating Security for Student Financials

Access the Set Security page.

Business Unit Select the business unit for which you want to update security. If you have multiple business units for which you must update security, run the process separately for each business unit.

Generate Report Select to update security *and* generate a report. If you do not select this check box, the system only updates security.

Run Click to run the SF Load Security Views process (SFRSCVW). When you run the process, the system also generates a report called the SF Load Security Views report.

Setting Security for SetIDs

To set up setID security, use two SetID components (SETID_CLASS_SECUR and SETID_OPERATOR_SEC).

Depending on the security option that you selected for setIDs on the Security Options page, you can grant access to a setID (tableset) using permission lists *or* user IDs. If you select no security for setIDs on the Security Options page, do not complete the pages listed in this section, because all user IDs and permission lists have access to all setIDs.

This section lists the pages used to set security for setIDs.

Pages Used to Set Security for SetIDs

Page Name	Object Name	Navigation	Usage
Permission List - Set ID	SEC_SETID_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, SetID	Grant a selected permission list access to specific setIDs.
User ID - SetID	SEC_SETID_OPR	Set Up SACR, Security, Secure Student Financials, User ID, SetID	Grant a selected user ID access to specific setIDs.

Setting Security for Business Units and Cashier Offices

To set up business unit and cashier office security, use two Business Unit components (SEC_UNITSF_OPR and UNIT_CLASS_SECURIT).

The pages discussed in this section enable you to grant security access to business units and to cashier offices within business units. If the institution does not use the cashiering feature, you do not need to set up cashier security, but you can set up business unit security.

Depending on the security option that you select for business units on the Security Options page, you should grant access to a business unit and cashier office using permission lists *or* user IDs. If you select no security for business units on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all business units.

This section lists prerequisites and discusses how to:

- Grant a permission list access to business units and cashier offices.
- Grant a user ID access to business units and cashier offices.

Prerequisites

Before you set security for business units and cashier offices, you must:

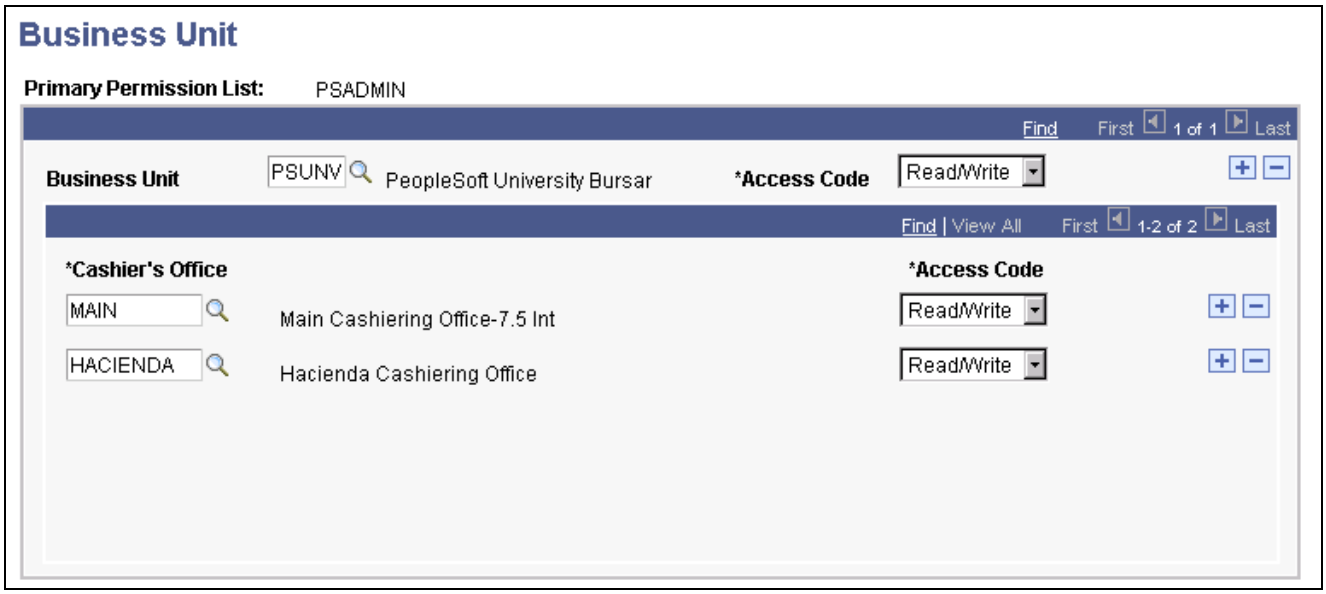
- Set up business units.
- Set up cashier offices.

Pages Used to Set Security for Business Units and Cashier Offices

Page Name	Object Name	Navigation	Usage
Permission List - Business Unit	SEC_UNITSF_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Business Unit	Grant a permission list access to business units. Within a business unit, you can also grant permission to specific cashier offices.
User ID - Business Unit	SEC_UNITSF_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Business Unit	Grant a user ID access to business units. Within a business unit, you can also grant permission to specific cashier offices.

Granting Permission List Access to Business Units and Cashier Offices

Access the Permission List - Business Unit page.



Business Unit page

Select the business unit that you want this permission list to access.

To grant the permission list access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

Granting a User ID Access to Business Units and Cashier Offices

Access the User ID - Business Unit page.

Select the business unit that you want this user ID to access.

To grant the user ID access to a cashier office, select the cashier office (within the business unit) that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

Setting Security for Item Types

To set up item type security, use these components: Item Type (SEC_ITEM_CLS and SEC_ITEM_OPR), Item Type Security (ITEM_TYPE_VW_CLS), and View Item Type Security (ITEM_TYPE_VW).

Depending on the security option that you select for item types on the Security Options page, you grant access to item types using permission lists *or* user IDs. If you select no security for item types on the Security Options page, you do not need to complete the pages discussed in this section, because all user IDs and permission lists have access to all item types.

This section lists prerequisites and discusses how to:

- Set item type security by permission list.

- View item type security by permission list.
- Set item type security by user ID.
- View item type security by user ID.

Prerequisites

Before you can set security for item types, you must:

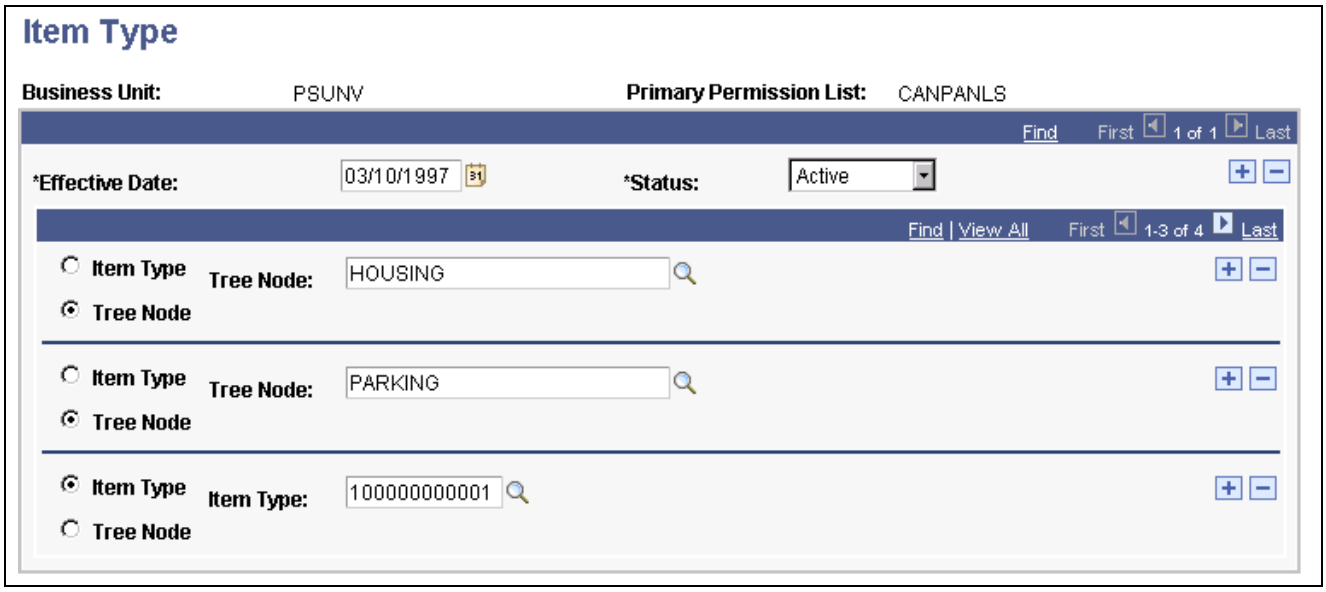
- Grant permission lists access to business units on the Permission List - Business Unit page, if you are securing item types by permission list.
- Grant user IDs access to business units on the User ID - Business Unit page, if you are securing item types by user ID.
- Set up the item type tree in Student Financials.

Pages Used to Set Security for Item Types

Page Name	Object Name	Navigation	Usage
Permission List - Item Type	SEC_ITEM_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Item Type	Set item type security for a permission list within a business unit.
Permission List - View Item Type Security	SCRTY_ITEM_TYP_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Item Type Security	View item type security by permission list. To view data on this page, you must set up item type security on the Permission Lists - Item Type page and have item type security set to permission list security on the Security Options page.
User ID - Item Type	SEC_ITEM_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Item Type	Set item type security for a user ID within a business unit.
User ID - View Item Type Security	SCRTY_ITEM_TYPE	Set Up SACR, Security, Secure Student Financials, User ID, View Item Type Security	View item type security by user ID. To view data on this page, you must set up item type security on the User ID - Item Type page and have item type security set to user ID security on the Security Options page.

Setting Item Type Security by Permission List

Access the Permission List - Item Type page.



Permission List - Item Type page

Item Type Select to grant access to a specific item type. After you select this option, you can select an item type from the available options.

Tree Node Select to grant access to all item types within a specific node on the item type tree. If you select a tree node, users have access to all items types defined within that node.

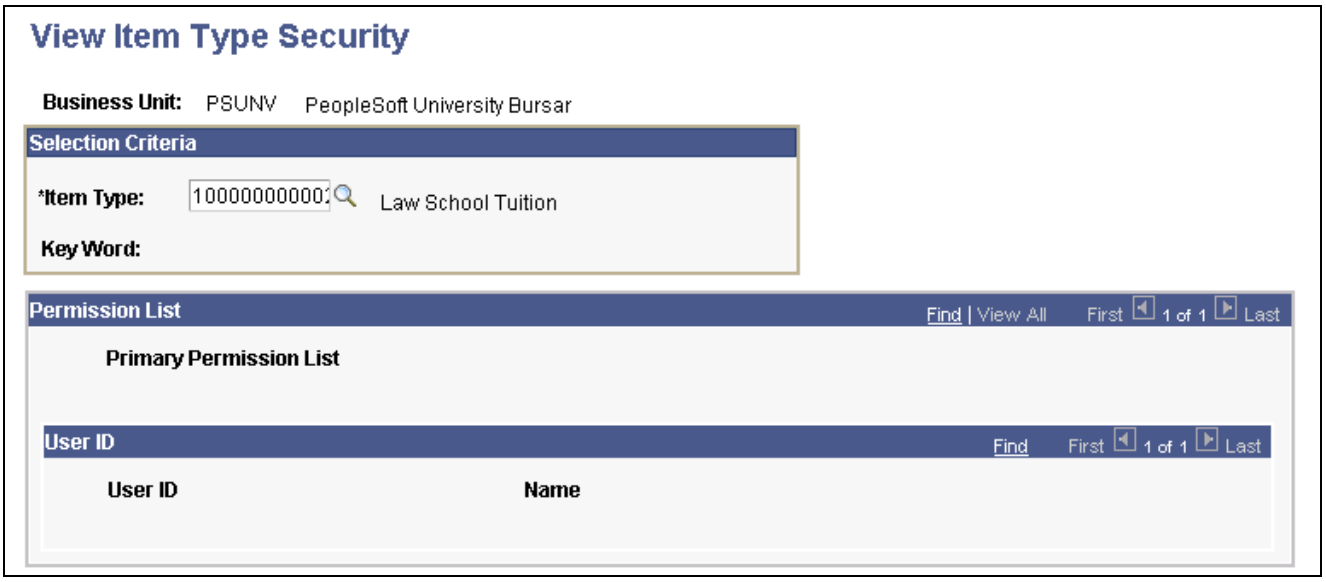
After you select this option, you can select a tree node from the available options.

You can select any combination of tree nodes and item types for the permission list to access. If you select a tree node, you do not need to separately list item types that fall under that tree node.

Note. If you select the tree node *ALL*—which generally includes the whole tree—select No Security for item types on the Security Options page. Granting access to the whole item type tree provides virtually no security at all.

Viewing Item Type Security by Permission List

Access the View Item Type Security page.



View Item Type Security page

Item Type Enter the item type for which you want to review permission list access. After you select an item type, information appears in the Permission List and User ID group boxes.

Key Word Displays the keyword if one is associated with the item type.

Permission List Displays the name of the permission list that has access to the selected item type.

Setting Item Type Security by User ID

Access the User ID - Item Type page.

You can set access either by defining specific item types or by defining a node on the item type tree. If you select a tree node, the user ID can access all item types on that node of the tree.

See Also

Chapter 15, “Securing Student Financials,” Setting Item Type Security by Permission List, page 257

Viewing Item Type Security by User ID

Access the User ID - View Item Type Security page.

See Also

Chapter 15, “Securing Student Financials,” Viewing Item Type Security by Permission List, page 258

Setting Security for Institution Sets

To set up institution set security, use two Institution Set components (SEC_ISET_CLS and SEC_ISET_OPR).

Depending on the security option that you select for institution sets on the Security Options page, grant access to an institution set using permission lists *or* user IDs. If you select no security for institution sets on the Security Options page, you do not need to complete the pages listed in this section, because all user IDs and permission lists have access to all institution sets.

This section lists a prerequisite and lists the pages used to set security for institution sets.

Prerequisite

You must set up institution sets before you set security for them.

Pages Used to Set Security for Institution Sets

Page Name	Object Name	Navigation	Usage
Permission List - Institution Set	SEC_ISET_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Institution Set	Grant permission lists access to specific institution sets.
User ID - Institution Set	SEC_ISET_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Institution Set	Grant user IDs access to specific institution sets.

Overriding the Self-Service Institution Set

To set up self-service institution set overrides, use the Student Institution Set component (ISET_OPR).

The User Profiles Management feature assigns institution sets to user IDs. You use the Self Service Institution Set Override page to change the institution set assigned by the User Profiles Management feature. By overriding the institution set on this page, instead of on the User Defaults 2 page, you can view a history of the changes.

This section lists prerequisites and discusses how to override the value for an institution set.

Prerequisites

You must first set up institution sets and then assign a user ID to an institution set. A user ID must be assigned an institution set by the User Profiles Management Application Engine process (USERPROFILE) to have an institution set appear in the Calculated Value field on the Self Service Institution Set Override page.

See Also

Chapter 17, “Creating and Maintaining User Profiles,” page 277

Page Used to Override the Self-Service Institution Set

Page Name	Object Name	Navigation	Usage
Self Service Institution Set Override	ISET_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Student Institution Set	Override the value for an institution set that has been assigned to the user ID by the User Profiles Management feature.

Overriding the Value for an Institution Set

Access the Self Service Institution Set Override page.

Self Service Institution Set Override page

Institution Set Select an institution set to make this value the default for this user ID in the user profile.

Calculated Value Displays the institution set value assigned to the user ID by the User Profiles Management feature. If you do not use the User Profiles Management feature, no value appears in this field.

The calculated value is the same as the Institution Set field on the User Defaults 2 page.

See Also

Chapter 19, “Setting User Defaults,” page 307

Setting Security for Companies

To set up company security, use two Company components (SEC_COMPANY_CLS and SEC_COMPANY_OPR).

Depending on the security option that you select for companies on the Security Options page, you grant access to companies using permission lists *or* user IDs. If you select no security for companies on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all companies.

Companies are used in PeopleSoft Enterprise Human Resources for payroll and pay groups. An employee’s company is usually designated as the company that pays the employee’s salary. You must set up company security so that you can access certain values when setting up Student Financials.

This section lists prerequisites and lists the pages used to set security for companies.

Prerequisites

You must first set up the company codes and permission lists.

Pages Used to Set Security for Companies

Page Name	Object Name	Navigation	Usage
Permission List - Company	SEC_COMPANY_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Company	Grant a permission list access to the transactions for particular companies.
User ID - Company	SEC_COMPANY_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Company	Grant a user ID access to the transactions for particular companies.

Setting Security for Origin IDs

To set up origin ID security, use two Origin ID components (SEC_ORIGIN_CLS and SEC_ORIGIN_OPR).

Depending on the security option that you select for origin on the Security Options page, grant access to an origin ID using permission lists *or* user IDs. If you select no security for origin IDs on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all origin IDs.

This section discusses how to:

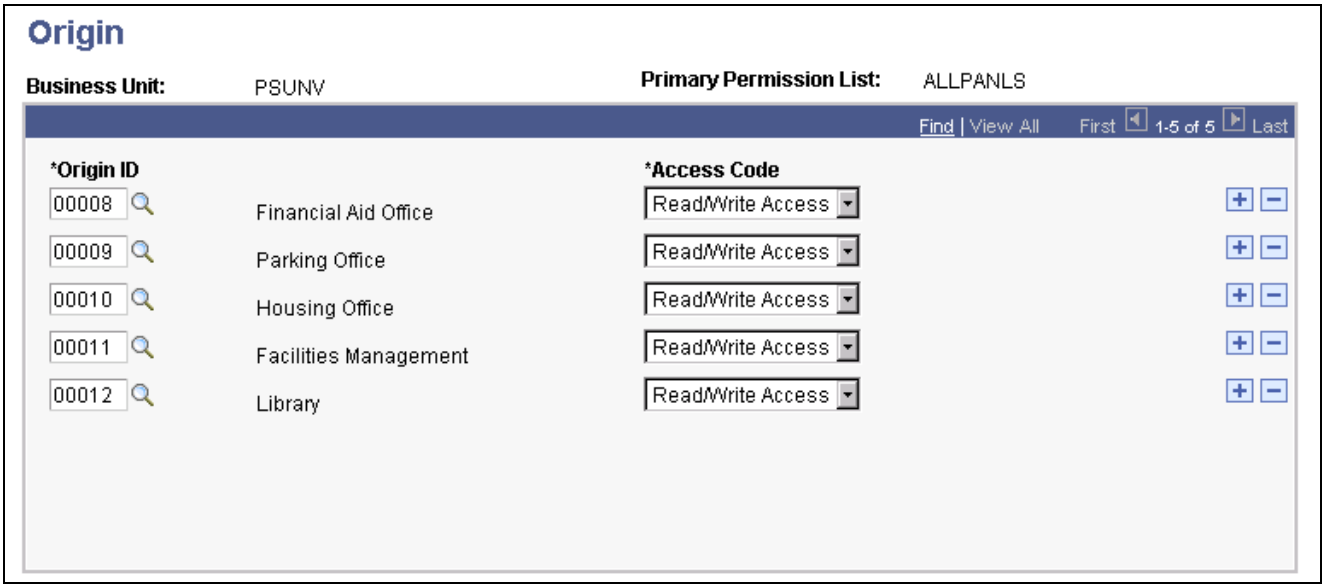
- Grant a permission list access to origin IDs.
- Grant a user ID access to origin IDs.

Pages Used to Set Security for Origin IDs

Page Name	Object Name	Navigation	Usage
Permission List - Origin ID	SEC_ORIGIN_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Origin ID	Grant a permission list access to origin IDs. You must first grant permission lists access to business units on the Permission List - Business Unit page.
User ID - Origin	SEC_ORIGIN_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Origin IDs	Grant a user ID access to origin IDs. You must first grant user IDs access to business units on the Use ID - Business Unit page.

Granting a Permission List Access to Origin IDs

Access the Permission List - Origin page.



Origin page

Select the origin ID that you want the permission list to access. If you do not want to grant access to an origin ID, do not include the origin ID on this page.

Granting a User ID Access to Origin IDs

Access the User ID - Origin page.

See Also

Chapter 15, “Securing Student Financials,” Granting a Permission List Access to Origin IDs, page 263

Setting Security for Credit Cards

To set up credit card security, use two Credit Card and Bank Account components (SEC_CC_CLS and SEC_CC_OPR).

Depending on the security option that you select for credit cards on the Security Options page, grant access for viewing credit card numbers using permission lists *or* user IDs. If you select no security for credit cards on the Security Options page, you do not need to complete the pages listed in this section.

Warning! If you select no security for credit cards on the Security Options page, all users can view the entire credit card number.

When you assign credit card security on the two pages listed in this section, you are granting the user ID or permission list access to view the entire credit card number. This security should be granted to only a few people in the institution. User IDs and permission lists to which you do not grant credit card security access can view only the last four digits of the credit card number.

Pages Used to Set Security for Credit Cards

Page Name	Object Name	Navigation	Usage
Permission List - Credit Card and Bank Account	SEC_CC_CLS	Set Up SACR, Security, Secure Student Financials, Permission List, Credit Card and Bank Account	Grant a permission list the ability to view the entire credit card number. You must first set up permission lists.
User ID - Credit Card and Bank Account	SEC_CC_OPR	Set Up SACR, Security, Secure Student Financials, User ID, Credit Card and Bank Account	Grant a user ID the ability to view the entire credit card number. You must first set up user IDs.

CHAPTER 16

Securing Contributor Relations

This chapter discusses how to:

- Set up Institution table security.
- Define and secure Contributor Relations business units and setIDs.

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Setting Up Your Contributor Relations Framework"

Setting Up Institution Table Security

To set up institution table security, use the Academic Institution Security component (SCRTY_TABL_INST).

This section discusses how to set institution table security.

Page Used to Set Up Institution Table Security

Page Name	Object Name	Navigation	Usage
Academic Institution Security	SCRTY_TABL_INST	• Set Up SACR, Security, Secure Student Administration, User ID, Academic Institution Security • Set Up SACR, Security, Secure Contributor Relations, Secure Institution Table	Set up security access for users at academic institutions.

Setting Institution Table Security

Access the Academic Institution Security page.

Academic Institution Security page

Academic Institution Provide the user with access to the system for that institution. When selected, the user automatically has read/write access to all the data related to that institution.

If a user is given access to only one institution, that institution defaults on all pages requiring an institution.

Defining and Securing PeopleSoft Enterprise Contributor Relations Business Units and SetIDs

To define and security Contributor Relations business units and setIDs, use these components: Business Unit CR (AV_BUS_UNIT), Functional Group Security (AV_FUNC_GRP_TBL), Functional Group Components (AV_CMPNT_FUNC), and Secure Business Unit (AV_SCRTY_BU_TBL).

This section discusses how to:

- Create Contributor Relations business units.
- Implement functional group security.
- Define functional group components.
- Choose component search record settings.
- Secure Contributor Relations business units.

Understanding Contributor Relations Business Units and SetIDs

Establishing business unit structure for Contributor Relations enables you to efficiently secure and segment data. This organizational structure may differ from the structure set up to support other PeopleSoft applications at the institution. You can define business units that reflect the functional needs of the institution, and setIDs for sharing tables with setup values. This structure enables you to define data segmentation based on business rules. In addition query and reporting capabilities become more powerful for the institution and the individual user.

In Contributor Relations, both the membership and commitment entry portions of the system are secured at the business unit level.

In addition, the system is delivered with a set of defined functional groups that represent the business processes impacted by business units. For each functional group, determine whether or not to implement user level security. If user security is selected for any functional group, establish user access to appropriate business units.

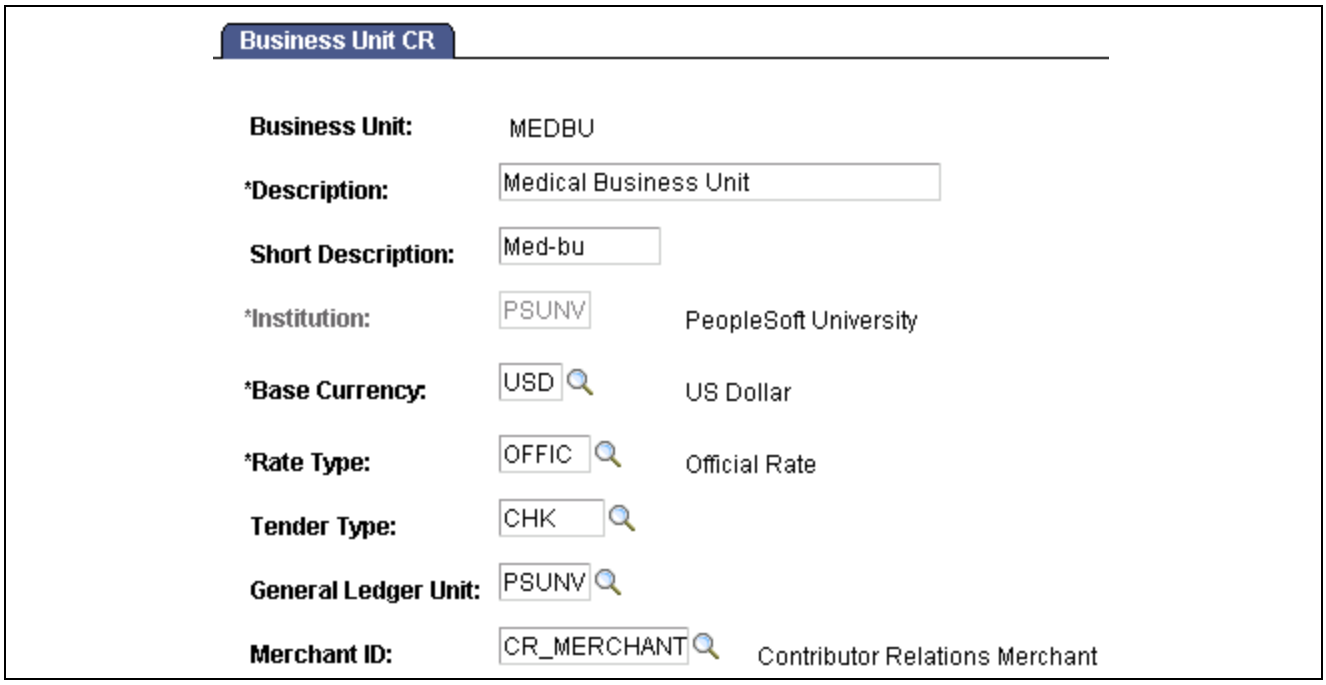
Warning! Before creating and securing business units, think carefully about how to set up the institutional structure and about what information particular users need to access. After you define a structure, you cannot delete a business unit to protect historical data related to a business unit.

Pages Used to Define and Secure Contributor Relations Business Units and SetIDs

Page Name	Object Name	Navigation	Usage
Business Unit CR (Contributor Relations)	AV_BUS_UNIT_TBL	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Business Unit CR	Define the business units at the institution from a cultivation and fundraising perspective.
Functional Group Security	AV_FUNC_GRP_TBL	Set Up SACR, Security, Secure Contributor Relations, Functional Group Security	Determine whether to implement user-level business unit security for the various functional groups in the system. Functional groups are delivered with the system as translate values and represent the business processes that use business unit functionality in the system. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
Component Function	AV_CMPNT_FUNC	Set Up SACR, Security, Secure Contributor Relations, Functional Group Components	Identify the components in the system that make up a functional group. The components in a functional group inherit the security settings you define for that group on the Functional Group Security page.
Component Search Records	AV_BU_SCRTY_REC	Click the Srch Recs link on the Component Function page.	View or select search views for components based upon the type of security used when accessing them.
CR Business Unit Security (Contributor Relations business unit security)	AV_SCRTY_BU_TBL	Set Up SACR, Security, Secure Contributor Relations, Secure Business Unit	Grant a user security access to one or more business units at the institution.

Creating Contributor Relations Business Units

Access the Business Unit CR page.



Business Unit CR page

Institution Select the name of the institution to which the business unit belongs. If you have already saved the business unit, this field is display-only. If a business unit is assigned to a different institution, a new business unit CR should be created.

Base Currency Select the base currency to default when entering transactions or working with financially driven Contributor Relations processes within this CR business unit.

Rate Type Select the exchange rate to use when translating amounts to the base currency for this business unit. Examples of rate type are *Official Rate, Spot Rate,* and *Free Market Rate.*

Note. Transactions entered in the system are translated from the session currency to the institution's base currency using the rate type on the Institution Defaults page. The business unit base currency setting is used as the default currency code for all membership and gift sessions created for a business unit, but can be overridden.

Tender Type Select the default tender type to use when entering transactions for this business unit. Tender types are defined on the Tender Types page. The tender type is used as the default tender type for all membership and gift sessions created for this business unit, but can be overridden.

General Ledger Unit Select the business unit at the institution where GL data for this Contributor Relations business unit is stored. Tying data to this general ledger unit enables you to structure Contributor Relations business units differently than other business units at the institution. The business units you define are tied back to the general ledger business units through this field.

Merchant ID To define the credit card merchant information and credit card default options for each business unit, enter the merchant ID from the CR Merchant table. You must associate each business unit with a merchant ID.

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Setting Up Commitment Management," Defining Connection Parameters for Third-Party Processor.

Examples

The following scenarios represent two different ways an institution might set up Contributor Relations business units.

PeopleSoft University A is a single campus institution. This institution's business units are organized along individual schools, with some degree of centralization. Its business units include:

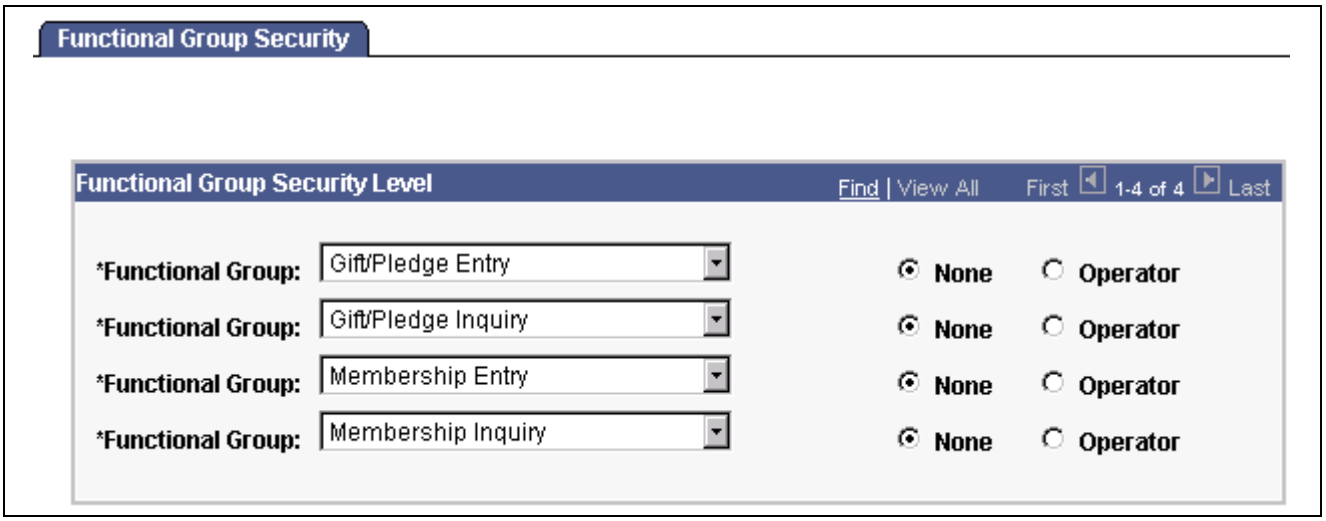
- Medical School Business Unit.
- Law School Business Unit.
- PeopleSoft University Business Unit (Centralized Business Unit for all standard schools. For example, School of Arts and Sciences, School of Business, and School of Education).

PeopleSoft University B is a multi-campus institution, and its business units are organized by its various locations. Its business units include:

- Main Campus business unit.
- Extension Campus business unit.
- Online Campus business unit.

Implementing Functional Group Security

Access the Functional Group Security page.



Functional Group Security page

Functional Group Select a functional group to define security for. Functional groups are delivered with the system and represent the major business processes in the system that are affected by business unit. The functional groups delivered with the system cannot be removed or amended.

Functional Security Select *None* to allow the components that make up this functional group to be accessed without user-level business unit security. Select *Operator* to allow access only with business unit security. If you select Operator, the access you

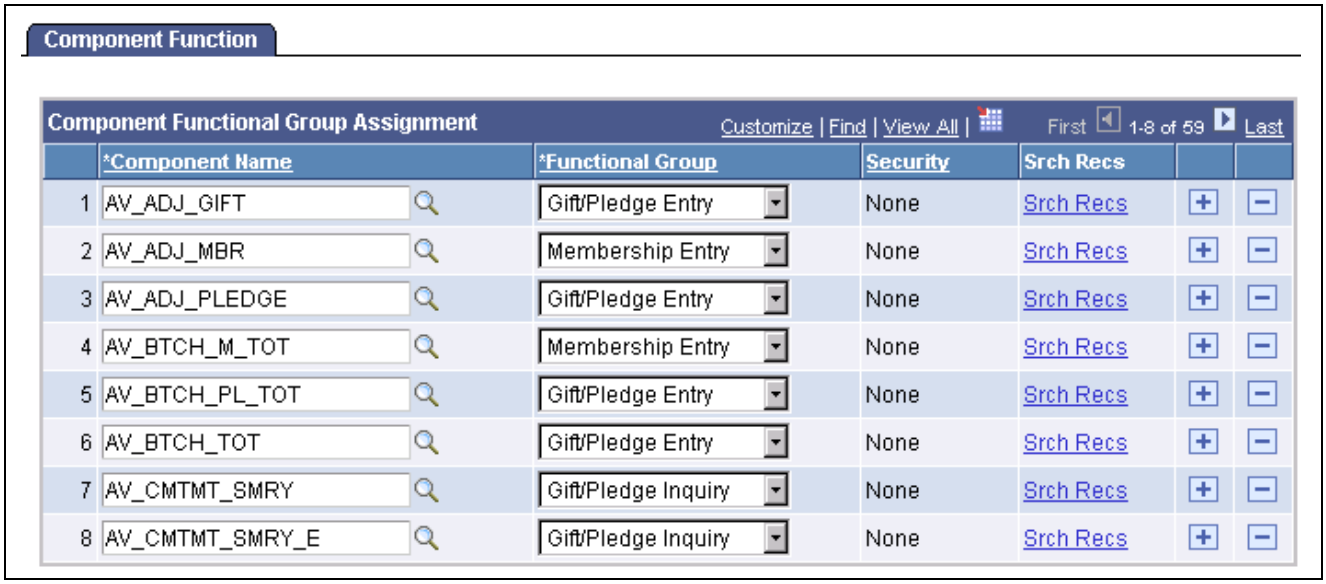
grant users on the Secure Business Unit page determine what information a user can access within the functional group.

Refresh Security If you make changes to the Functional Security selection for any functional group, this button appears. Run the Refresh Security Process to activate any changes made to security settings. The Refresh Security process is an Application Engine program that synchronizes the component search records and prompt edit table values with the setup of the PSSTATUS table. Updating this value ensures that all Application Servers use the latest version. This is not limited to Contributor Relations; it impacts all PeopleSoft applications sharing the database. When you run this process, check the Process Monitor to verify that it runs successfully and the Message Log for a detailed list of the changes implemented. See the warning in this section prior to running this process.

Warning! After running the Refresh Security process, you must delete all cache files. You must also re-run the PeopleTools process that creates a shared cache file for multiple application servers. This process impacts all applications sharing this database! Contact your IT Support Staff before running this process.

Defining Functional Group Components

Access the Component Function page.



Component Function page

Warning! If the security determination process is run on a component that's not assigned to a functional group on this page, the system displays a warning alerting you to the missing setup values, and the component is accessed without business unit security activated. The system is delivered with all of the appropriate components assigned to their respective functional group. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

Component Name Select the component being assigned to a functional group. Components are groupings of pages. You can select from a list of all the valid components in the system.

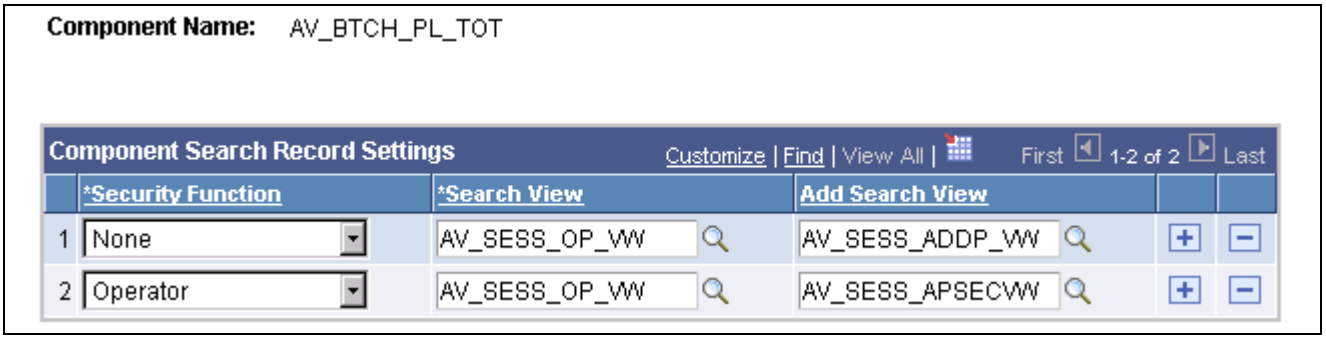
Functional Group Select the name of the functional group to which the component belongs. Functional groups are delivered with the system and represent major business processes in the system that use CR business unit security.

Security If you have defined security for the CR functional group you select, the security option appears. Valid security options include *Operator* or *None*. Select operator to limit access to the component based on CR business units.

Srch Recs (search records) Click if user-level security for a component is controlled at the search record level. The Component Search Record Settings page displays.

Choosing Component Search Record Settings

Access the Component Search Record Settings page.



Component Search Record Settings page

Warning! The system is delivered with all search views assigned to the appropriate components. Do not make any changes to these settings unless the institution is adding business unit functionality not provided by Contributor Relations.

Security Function Select *None* or *Operator* to determine the type of security for which you are selecting search views.

Search View Select the search view to associate with the component for the security function you selected. The prompt lists all valid search views.

Add Search View If a component is configured to allow you to add a new record, and the search view to create a new record is different than the Update/Display search record, specify an add search view. For example, you want *NEW* in the session number field instead of blank by default.

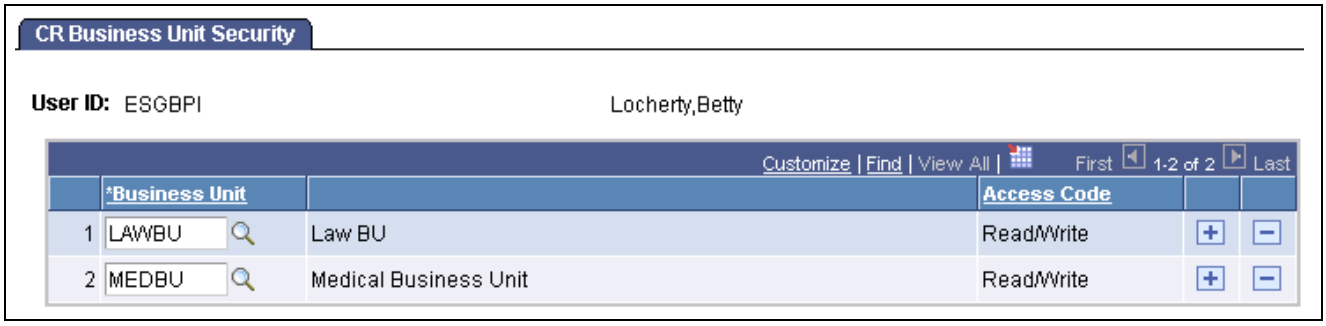
The following components are secured at the search view level:

Functional Group	Component	Description
Gift/Pledge Entry	AV_BTCH_TOT	Balance Session
	AV_BTCH_PL_TOT	Pledge Balanced Session
	AV_PLDG_SCHD_ADJ	Pledge Schedule Adjustment

Functional Group	Component	Description
	AV_PLDG_SCHED_ADJ_E	Org Pledge Schedule Adjustment
Gift/Pledge Inquiry	AV_PLDG_SCHD_INQ	Pledge Schedule Inquiry
	AV_PLDG_SCHD_INQ_E	Org Pledge Schedule Inquiry
	AV_SPR_GIFT_SMRY	Supervisor Gift Summary
	AV_SPR_PLEDGE_SMRY	Supervisor Pledge Summary
Membership Entry	AV_MEMBERSHIP	Manage Member Organization
	AV_BTCH_M_TOT	Membership Balance Session
Membership Inquiry	AV_SPR_MBRSHP_SMRY	Supervisor Membership Summary

Securing Contributor Relations Business Units

Access the CR Business Unit Security page.



CR Business Unit Security page

Business Unit Select the business unit for which you want to grant the user access.

Access Code Indicates the type of access a user has to a particular business unit. Since security is granted when you add a row to this table, this field displays a value of *Read/Write.*

Understanding Business Units and the Commitment Entry Process

The following process describes how business units work within the commitment entry process. This process assumes that you have already set up an operational structure, including business units and setIDs, and secured them.

To work with business units throughout the commitment entry process:

1. Define setup values for commitment entry.

   These include defining values for designations, initiatives, and appeals.

2. Set up user defaults for institution, business unit, and setID using the Operator Defaults page.

   These default values are used throughout the system. In addition, select defaults for designation business units.

3. Open a new gift or pledge session.

   Each session is associated with a business unit. Within the session, commitments can be designated to one or more business units. After a session is established, default designation business units, designation, initiative, and appeal can be defined using the Session Defaults page. These defaults override any user defaults that have been defined. Session defaults can also be changed at any point during the transaction entry process.

See Also

Chapter 19, "Setting User Defaults," Entering User Defaults, page 307

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Entering Commitments," Selecting Session Defaults

Understanding Business Units and the Membership Process

The following process describes how business units work within the membership process. This process assumes you have already set up an operational structure, including business units and setIDs, and secured it. The process also assumes you have defined user defaults and setup values for the commitment entry process.

To work with business units throughout the membership process:

1. Define setup values for membership including appeals, membership types, and membership categories.

   See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Setting Up Initiatives," Setting Up Membership Initiatives.

2. Create a member organization within a business unit.

3. Define member dues for the member organization.

   When defining dues, specify default designations to which dues payments are allocated. Select a designation business unit, designation, initiative code, and amount for each designation to which a portion of the dues payment is allocated.

   See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Membership," Creating a Member Organization.

4. Create a membership initiative. Select a business unit to associate with the membership initiative. This "owner" business unit controls the available prompt values when selecting a responsible department, selecting an associated member organization, defining annual goals, selecting a public relations appeal, and selecting an appeal for a budget expense.

   See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Initiatives," Defining an Initiative.

5. Receive a membership payment/open a membership session. Select a business unit for the session. When you assign membership dues designations, the values defined on the Member Dues page populate the fields on the Designations page. You can edit the Initiative and Amount fields.

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Membership," Entering Member Dues.

Contributor Relations Business Unit Security and PeopleSoft Query

Business unit security is applied to functional groups within Contributor Relations through a user-defined setting based on components not records. Therefore, it has not been applied to PeopleSoft Query. Contributor Relations records are delivered in the system without a Query Security Record attached, but an example of how you could extend business unit security to PeopleSoft Query is provided.

It is important to remember that there are two ways of using business units within Contributor Relations.

The first is the business unit owning the transaction (such as gift, pledge, member payment), and the second is the designation business unit or the business unit to which some portion of a transaction amount is directed. The first is represented by the BUSINESS_UNIT field throughout the system, while the second is represented by the AV_DES_BU field. In most cases, business unit security is applied to the AV_DES_BU field throughout the system when invoked. There are, however, some cases where the business unit security setting is applied to the owning business unit as opposed to the designation business unit. When designing queries and query security records, deciding where to apply the security affects which query security record is used and what data is returned. If securing by owning business unit, the query security record AV_BU_SCRTY_VW is used, and if securing by designation business unit, the query security record AV_BU_SCRTY_DES should be used.

Applying security to both business unit types in a query most likely does not produce the desired result. For example, take an installation that has three business units BU1, BU2, and BU3. A gift is entered by business unit BU1 and some of the gift is directed toward a designation fund in BU3. A user exists who has security access to see the gift information for BU3 only. If query security is applied at the owning business unit level, the user is then prevented from seeing that portion of the gift directed to their business unit. If both owning business unit and designation business unit security are applied in a query at the same time, the owning business unit application prevents the designation business from even being considered. If the query security is applied at the designation business unit level only, the user can only see that portion of the gift that was given to their business unit.

Examining a Query Security Example

There are two methods for applying business unit security to PeopleSoft Query:

- Using the PeopleTools Query Security Record function and one of the delivered Business Unit Security records (AV_BU_SCRTY_VW and AV_BU_SCRTY_DES).

  Use this method to provide records for which the user population can create queries that are automatically secured by PeopleTools.

- Using a subquery and the query metastring %OPERATORID.

  Use this method to develop queries (or Query/Crystal reports) that are created centrally for the user population but available for users to run on their own.

There are three delivered queries provided to illustrate the two methods:

- AV_SECURITY_EXAMPLE_NONE
- AV_SECURITY_EXAMPLE_SECURED
- AV_SECURITY_EXAMPLE_SECURED2

Unsecured Example

The query AV_SECURITY_EXAMPLE_NONE is an unsecured query of Recognitions with the following criteria:

- Credit type *Hard*.
- Person recognitions only.
- Posted.
- Not adjusted.
- Institution equal to *PSUNV*.

The result of this query is the data to which the query security is applied in the next two examples. To see the impact on the query results with each type of setup, run the query as a user with access to all business units then as a user with access to only one business unit.

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100
PSUNV	69	134	USD 100	G	DM0049	Nguyen, Kimberly	Hard Credit	USD 100	100
PSUNV	70	135	USD 250	G	DM0041	Chang, Zheng	Hard Credit	USD 250	100
PSUNV	70	136	USD 250	G	DM0040	Szymborski, William	Hard Credit	USD 250	100
PSUNV	71	137	USD 50	G	DM0040	Szymborski, William	Hard Credit	USD 50	100
PSUNV	71	138	USD 100	G	DM0040	Szymborski, William	Hard Credit	USD 100	100
PSUNV	71	139	USD 150	G	DM0040	Szymborski, William	Hard Credit	USD 150	100
PSUNV	71	140	USD 200	G	DM0040	Szymborski, William	Hard Credit	USD 200	100
PSUNV	71	141	USD 200	G	DM0040	Szymborski, William	Hard Credit	USD 200	100
PSUNV	71	142	USD 250	G	DM0040	Szymborski, William	Hard Credit	USD 250	100

PeopleTools Query Security Record Function

The next query, AV_SECURITY_EXAMPLE_SECURED, includes a record, AV_RECOG_SEC_VW that has a security view attached to it via the Query Security Record attribute. In this case, the Query Security Record is AV_BU_SCRTY_DES. This record is a view of PS_AV_SCRTY_BU_TBL substituting the AV_DES_BU field for the Business Unit field. When a record has a Query Security View attached, PeopleSoft Query automatically adds a filter of {Security_Record}.OPRID = %OPERATORID. At run time, the %OPERATORID string is substituted with the user ID of the current user. PeopleTools also joins the record and its Query Security record by other common keys. In this manner, the user only sees the AV_RECOG_SEC_VW records to which they have security.

With the same data set and a user who only has access to the business unit *MEDBU,* the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

Using a Subquery for Security

The final query, AV_SECURITY_EXAMPLE_SECURED2, is similar to the unsecured example above in that it uses the base unsecured tables. In this case however, a subquery is added to provide the join to the Business Unit Security table and only return rows to which the current user has authority. Because security is applied to the designation business unit in this example, the record AV_RCG_DES is substituted for the record AV_RECOGNITION from the unsecured query. The field AV_DES_BU is now available for applying the query security. The subquery appears as a filter on the AV_DES_BU field when the Criteria tab is selected. The subquery uses the AV_SCRTY_BU_TBL and criteria of OPRID = %OPERATORID to substitute the user ID of the user currently executing the query.

With the same data set and a user who only has access to the business unit *MEDBU,* the results are as follows (notice the absence of any data for the *PSUNV* business unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

CHAPTER 17

Creating and Maintaining User Profiles

This chapter provides an overview of user profiles security and discusses how to:

- Prepare for user profiles management.
- Set up user profiles management.
- Run the User Profiles Management process.
- Generate password notification letters.
- Resolve issues for the User Profiles Management process.

Understanding User Profiles Security

To provide self-service access to an individual, create a user profile by selecting PeopleTools, Security, User Profiles, User Profiles. You then add a password and all the security that the individual needs to access the site. The User Profiles Management process enables you to create and maintain user profiles in batch. You must understand how a user profile is created before you run the User Profiles Management process.

Warning! Before you use this process, make sure that you understand how PeopleTools security works. When you provide database access to a large number of people, you can only revoke the access manually. A user with a high level of security in the institution should be in charge of running and setting up the process. Few people should have access to the user profiles management setup and process pages.

The User Profiles Management Application Engine process (USERPROFILE) consists of four main processes. These processes enable you to:

- Create new user profiles and add role for the user IDs.
- Delete a role from user profiles.
- Add a role to existing user profiles.
- Assign user preferences (default values) for the user IDs, including security values needed for the online credit card process.

You can run these four processes individually or all at once. The User Profiles Management process runs the four processes one role at a time. The mass change selects a group of people—for example, applicants—and then runs the processes based on a role (for example, the Applicant role). Each of the processes uses temporary tables so you can validate the processes' actions. These temporary tables are useful if you run the User Profiles Management process for many roles at once. A cleanup page enables you to delete these temporary tables.

The User Profiles Management process enables you to create user profiles and assign user IDs and passwords to groups of individuals. You can select which algorithms to use for creating the user ID and password and assign a checklist, a communication, or a comment to the user ID. The communication can include a letter that informs new users of their user IDs and passwords for access to the web.

The User Profiles Management process also enables you to maintain existing user profiles by adding or deleting roles to grant or remove page access. It can also set up the user preferences, which are default values, for basic fields like Academic Career and Academic Institution. If the institution accepts credit cards, you can use the feature to give appropriate security access for the online credit card functionality. The system uses mass changes to select the population of individuals for whom you want to create or maintain user profiles.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table

Delivered Mass Changes for User Profiles Management

PeopleSoft delivers several mass change examples that you can use with the User Profiles Management process.

PeopleSoft delivers these mass change examples:

- Userprofile - Advisor.
- Userprofile - Applicant.
- Userprofile - Contributor.
- Userprofile - Employee.
- Userprofile - Former Student.
- Userprofile - Fundraiser.
- Userprofile - Graduate.
- Userprofile - Instructor.
- Userprofile - Prospect.
- Userprofile - Recruiter.
- Userprofile - Student.

Note. If you elect to use the Dynamic Role Member Assignment process (DYNROLE_PUBL) that is provided with PeopleTools to assign roles to already existing user IDs make sure the queries you create have the same criteria as the mass changes you are using.

The *Enterprise PeopleTools PeopleBook: Security Administration* contains more information on the Dynamic Role Member Assignment process.

Preparing for User Profiles Management

Before you run the User Profiles Management process, you must complete the setup described in this section. You should complete the setup in the order shown.

Warning! Make sure you understand PeopleSoft security before you attempt to use the User Profiles Management process.

This section provides an overview of the creation of the model user ID and discusses how to:

1. Create the model user ID.
2. Enter the model user ID description.
3. Set up the roles.
4. Set up permission lists.
5. Set up primary permission lists.
6. Set up mass changes.
7. Set up event IDs for the communication, checklist, and comment (3C) engine.
8. Set up communications.
9. Set up checklists.
10. Set up comments.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding the Creation of the Model User ID

The User Profiles Management process creates user profiles based on a user ID that serves as a model. You create user IDs or user profiles in the User Profiles component USERMAINT (PeopleTools, Security, User Profiles, User Profiles).

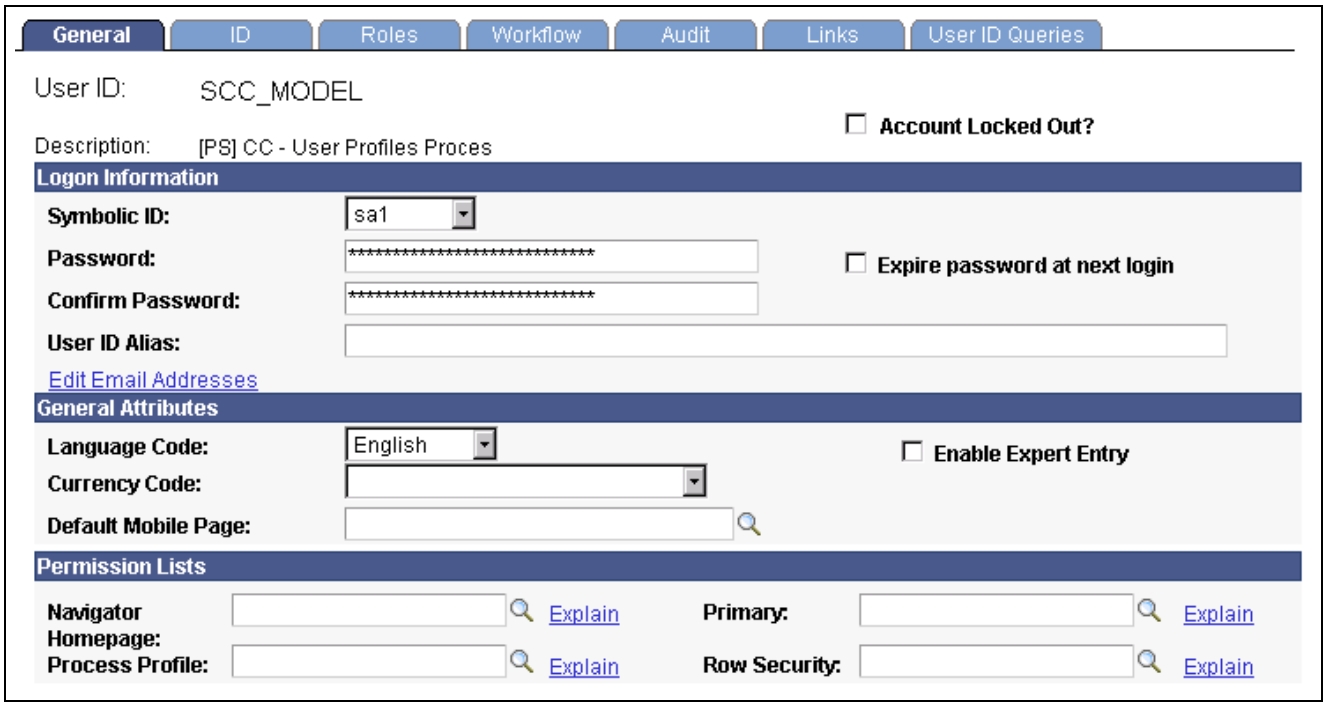
For example, use the delivered model user ID *SCC_MODEL* for the Campus Solutions model. You only need to complete the first two pages in the User Profiles component. The other pages in the component do not contain any fields that the User Profiles Management process uses.

Pages Used to Prepare for User Profiles Management

Page Name	Object Name	Navigation	Usage
User Profiles – General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Create a user ID that the User Profiles Management process uses as a clone (model) when creating user profiles.
User Profiles – ID	PSOPRALIAS	PeopleTools, Security, User Profiles, User Profiles, ID	Enter the ID type 'None' and description for the model user ID that the User Profiles Management process uses when creating user profiles.

Creating the Model User ID

Access the User Profiles – General page.



User Profiles – General page

Add a new value to create a user ID or used the delivered example called SCC_MODEL.

Note. The Account Locked Out functionality is not cloned for the user profiles created in batch. When the user profiles are created, they are ready for the self-service users to access the site.

The system clones these fields to create the user profiles: Symbolic ID, Language Code, Navigator Homepage, Process Profile, Primary, and Row Security.

It is strongly recommended that you always select a symbolic ID, regardless of the role for which you are running the process. For example, if you are running the process using the role Prospects and you believe the role does not need a symbolic ID, consider that when prospects become applicants or students, they *do* need a symbolic ID. There is no background process to create one.

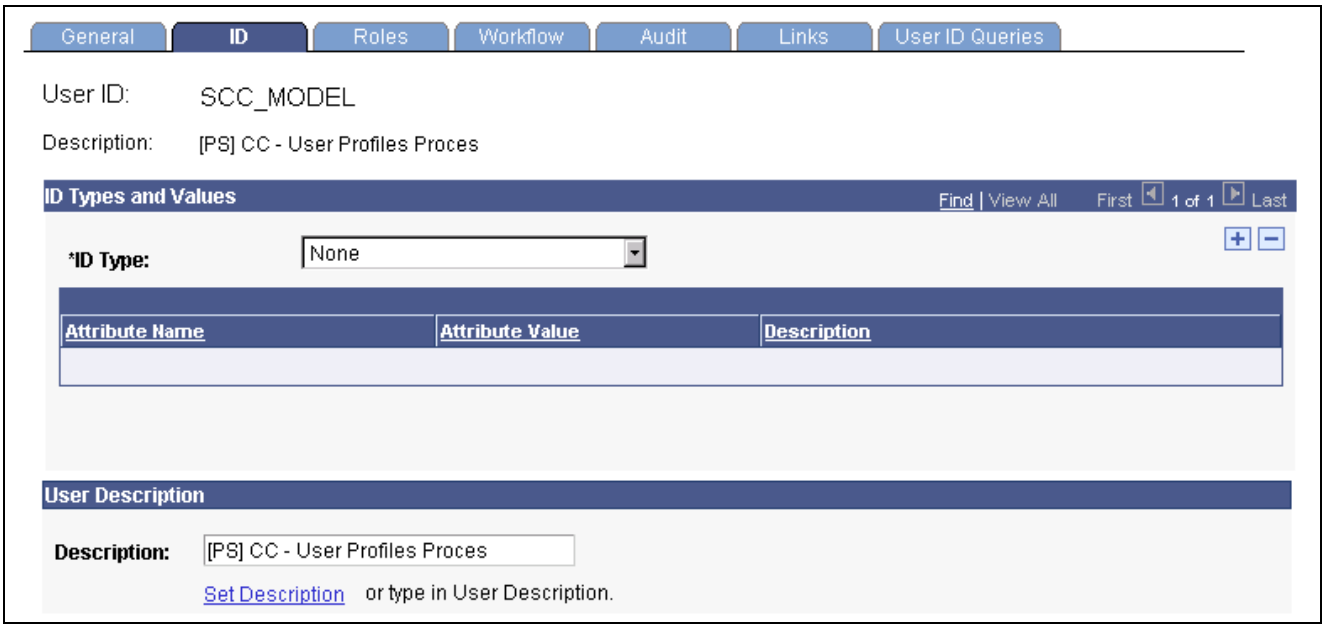
Enter a password and confirm it. These fields are required on this page, but the system *does not* clone the password when you create the new user IDs.

See Also

Chapter 17, "Creating and Maintaining User Profiles," Setting Up Permission Lists, page 281

Entering the Model User ID Description

Access the User Profiles - ID page.



User Profiles – ID page

The system uses none of the fields on this page during the User Profiles Management process. However, the component requires an ID Type. Select an ID Type of *None*. This value is not cloned by the User Profiles Management process. Use the User Profiles Mass Creation setup page to set up the ID type to use for the user profiles that you create.

Attribute Value The process automatically adds a value for each user profile that you create.

Description Enter the name for the model user ID.

Note. You do not need to enter any other fields than the ones described when you create the model user ID to be used by the User Profiles Management process. None of the fields on this page are cloned.

Setting Up the Roles

You must define the roles that the User Profiles Management process assigns to self-service users. For example, you might want to have roles for applicants, students, prospects, instructors, recruiters, and so on.

Consider the names of the delivered mass changes when creating the roles. For example, the mass change User Profile — Applicant could be used to assign the role “Applicant”. Refer to the list of delivered mass changes earlier in this chapter.

See Also

Chapter 17, “Creating and Maintaining User Profiles,” Setting Up Mass Changes, page 282

Setting Up Permission Lists

You must set up a permission list to give self-service users access to pages. PeopleSoft recommends that you at least give self-service users access to the Campus Personal Information pages if you licensed the PeopleSoft Campus Self Service product. You set up permission lists in the Permission Lists component (PeopleTools, Security, Permissions & Roles, Permission Lists).

See Also

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

Setting Up Mass Changes

For each role that you create, you must create a corresponding mass change to define the search criteria that will identify a population. The PeopleSoft system comes with several mass change examples that you can use to create your own.

See Also

Chapter 17, "Creating and Maintaining User Profiles," Delivered Mass Changes for User Profiles Management, page 278

Enterprise PeopleTools PeopleBook: Data Management, "Mass Change"

Setting Up Event IDs for the 3C Engine

To assign a communication, checklist, or comment to the user IDs that you create with the User Profiles Management process, you must set up a 3C engine event ID.

See Also

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

Setting Up Communications

To send a letter to notify new users of their user IDs and passwords, set up a communication. Make sure the letter code that you create in the Standard Letter table has these characteristics:

- Function equal to *Gen* (general).
- SQC name equal to *CCLTRWOL*.

Without having this specific SQC name, the Letter Generation SQR process (CCLTRGEN) does not extract the user IDs and the passwords to print on the letters. To facilitate printing letters with the user IDs and passwords, you can use the delivered template called CCLTROPR.doc. To use this template, create a letter code called *OPR*. You must also create a communication speed key (also called a comm key) and an event ID.

Warning! Do not modify the SQC named CCLTRWOL.sqr in any way.

The User Profiles Management process enables you to assign more than one communication. For example, if you are creating user profiles for the prospects for next term, you can create an event ID with different comm keys. One might include a letter code for a letter communicating user IDs and passwords, a second might be for a postcard for an invitation to an open house, and a third might be for an admission package.

Warning! The User Profiles Management process assigns communications *only* to individuals with a user profile created by the process.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications"

Chapter 17, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 292

Setting Up Checklists

To assign a checklist code to self-service users, you must create checklist items and a checklist code, and you must add the checklist to the event ID. A checklist could be used for the users' list of things to do.

Warning! The User Profiles Management process assigns checklists only to the individuals who have a user profile created by the process.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications"

Setting Up Comments

You can assign a comment to the self-service users. For example, you might need to know whether an individual's user profile was created by the User Profiles Management process. You could create this comment: this individual's user ID was created by the User Profiles Management process. To do this, you create a comment category and add it to the event ID.

Warning! The User Profiles Management process assigns comments only to the individuals who have a user profile that is created by the process.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Comments"

Setting Up User Profiles Management

To set up user profiles, use the User Profiles Mass Creation component (OPER_LOAD).

The User Profiles Mass Creation component is the setup component for the User Profiles Management process. When you access the component, select a role name. That role is added to user profiles or deleted from existing user profiles, depending on the processes you select when you run the User Profiles Management process.

On the first page of the component, select the mass change that you want to use to select a group of individuals. You select individuals whose role you want to add or delete in new or existing user profiles. You can then review the list of these individuals whose user profiles you plan to create or modify. The individuals appear in a search results grid at the bottom of the page after you run the mass change. The list provides a count of the number of IDs selected. On the first page, you also determine how the user ID and passwords are created. You can also assign 3C items and create a result table, which is a temporary table that holds the new user IDs and their nonencrypted passwords.

On the second page of the component, you select the user preferences (default values) to assign to the user IDs. You also set IDs to use the online credit card functionality.

This section discusses how to:

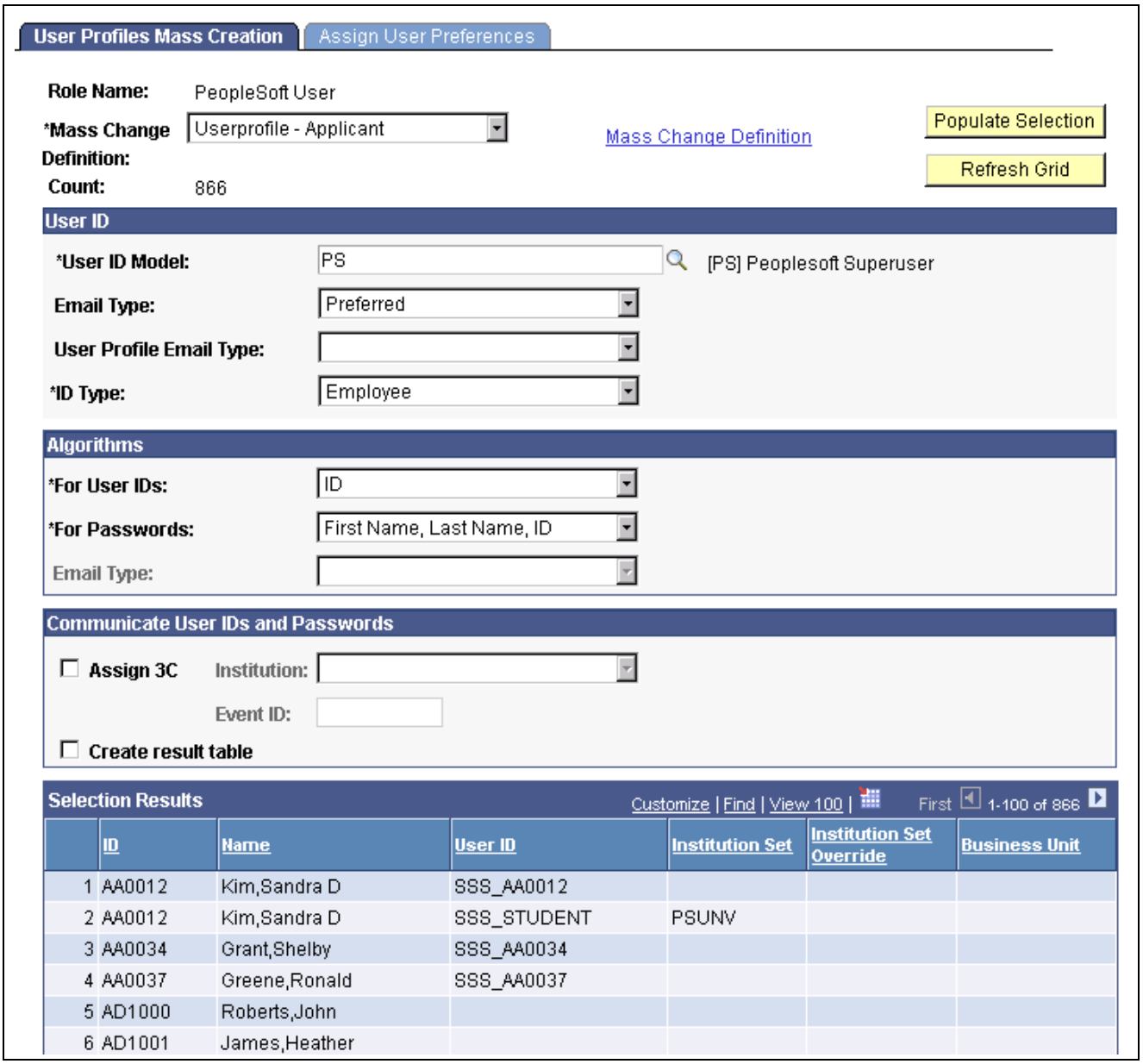
- Select users.
- Assign user preferences.

Pages Used to Set Up User Profiles Management

Page Name	Object Name	Navigation	Usage
User Profiles Mass Creation	OPER_ROLE_DEFN	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Assign User Preferences	OPER_ROLE_DEFN_ASS	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation, Assign User Preferences	Select user preference default values for institution, academic career, term, and aid year. You can also set up the values for institution set and business unit if the institution uses the online credit card process.

Selecting Users

Access the User Profiles Mass Creation page.



User Profiles Mass Creation page

Select the mass change that the system uses to create the list of users to process. Click the Mass Change Definition link to access the Mass Change Definition component, where you can select different parameters for the mass change selection.

Note. It is good practice to always regenerate a mass change prior to using it, even if you didn't modify the criteria. That way, you ensure that you are using the latest data.

Count Displays the number of users selected by the mass change. This field is populated after you click the Populate Selection button.

Populate Selection Click to run the selected mass change. The Selection Results grid displays a list of person IDs when the mass change processing is complete. Generate the mass change each time that you create user profiles. That way, you ensure that you are using the latest data.

Refresh Grid Click to delete the mass change results from the buffer and from the Search Results table. If you do not refresh the grid after you use it, it may take a while to open this page the next time that you access it.

User ID

The fields in this area are used as the basis for the new user profiles.

User ID Select the user ID that you want to use as the model for the user profiles. For example enter the SCC_MODEL user ID.

Email Type Select the email type to enter in the user profile. The system uses the EMAIL_ADDRESSES record to determine the email address, based on the type that you select. The email address (for the IDs that have one) is added in. the Email Addresses page of the User Profiles component (PeopleTools, Maintain Security, Use, User Profiles, Edit Email Addresses link). If the user does not have an email address of the selected type, no email address is added to the user profile.

If you select *Preferred,* the system uses the email address marked as the preferred address on the Electronic Addresses page.

Note. If you select a value for Email Type you are required to enter an equivalent value in the User Profile Email Type field, and vice versa.

User Profile Email Type Because the user profile stores different Email Type values than the ones used throughout the applications, select the corresponding email type that will match the type previously selected. The valid values are: *Blackberry*, *Business*, *Home*, *Other*, and *Work*. Those values are delivered with the system as translate values and should not be modified.

ID Type By default, the system uses the value *Employee.* You can run the User Profiles Management process only for that ID type.

Algorithms

Select the algorithms for the system to use when creating new user IDs and passwords.

For User IDs Select *ID* or *Email* to indicate which value to use to create the user IDs for the selected users.

If you select *ID,* the new user ID is the same as the ID.

If you select *Email,* you must select the Email Type For User ID to be used.

For Passwords Select to indicate how the system creates the new passwords for the new user IDs.

Select *First Name, Last Name, ID* to create passwords using the first two characters of the first name plus the first two characters of the last name plus the ID, if the ID is four characters or less. If the ID has more than four characters, the last four characters of the ID are used.

Select *Random Creation* to create more secure passwords. The random password is created by using the 26 letters of the alphabet and numbers from 1 to 9.

The length of the password is determined by the Minimum Password Length field on the Password Controls page (PeopleTools, Maintain Security, Setup). If the value in this field is less than *8*, a password length of eight characters is used.

If the Required Number of Specials field on the Password Controls page is set to a value other than *0*, the same number of special characters (that is, *@, #, $, %, ^, &, *, ~, !, ?*) is randomly picked and appended to the end of the password.

Email Type Select the email type to use. If you select *Preferred,* the system uses the email address marked as the preferred address on the Electronic Addresses page. The new user IDs are the characters before the @ symbol, excluding spaces and special characters.

Important! If you select *Email* in the For User IDs field and the user does not have the email type that you select, a user profile is *not* created for the user. Instead, an error row is added to the temporary table (PS_ERR_LOG_USRPRF) with the error code *4*.

Communicate User IDs and Passwords

Assign 3C Select to assign communications, checklists, or comments to the user IDs that the process creates. If you select this check box, select a 3C engine event ID that the system uses to determine which communications, checklists, and comments to assign. Any communications, checklists, or comments should be created in *one* event ID.

You can use this field to assign a communication that tells new users their user IDs and passwords for an internet site.

When the User Profiles Management process runs with the Create User Profiles option and the Assign 3C option selected, the system invokes the 3C engine. 3C engine adds communications, checklists and comments directly to the communication tables, checklist tables, and comments tables, respectively. Consequently, all new users automatically receive the communications, checklists, and comments that are assigned.

Institution Select the institution associated with the event ID. This information is needed for the 3C engine.

Event ID Select the event ID that you created to assign communications, checklists, and comments. This information is needed for the 3C engine.

See Chapter 17, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 292.

Create result table When this check box is selected, a temporary result table is created when you run the User Profiles Management process. This temporary table is the *only* place where the newly created passwords appear nonencrypted. If you do not select this check box, the passwords cannot be seen and therefore cannot be communicated to the new self-service users.

Note. The check box is automatically selected at save time if you select the Assigned 3C option using an event ID that has been set up with a comm key that includes a letter code with the unique SQC CCLTRWOL. The Letter Generation process uses the temporary table to print the user IDs and the passwords on the letters.

See *Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table*

Selection Results

Click the Populate Selection button to populate this area.

ID Displays the list of person IDs that match the criteria specified in the selected mass change. If an ID is listed multiple times, more than one user ID was previously created for the same ID.

Note. The User Profiles Management process does not create a user ID for the person IDs that already have a user ID. If you see in the gird that a person ID has multiple user IDs, it is because an administrative user manually created them.

Name Displays the name associated with the person ID.

User ID Displays the user ID assigned to the person ID. This information enables you to determine which IDs have a user ID versus the ones who do not. The User Profiles Management Application Engine process (USERPROFILE) creates a user ID for the one that do not have one.

Note. If a user ID already exists, the process *does not* create a new one.

Institution Set Displays the institution set assigned to a user ID by the Assign User Preferences Application Engine process. This value is mostly used by the online credit card process.

If a user ID already has an institution set associated with it, the institution set is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's institution set. However, if an administrator has manually entered an institution set, the process does not change the manually entered institution set.

Institution Set Override Displays the institution set entered on the Self Service Institution Set Override page. The background process *does not* override this value.

See Chapter 15, "Securing Student Financials," page 249.

Business Unit Displays the business unit assigned to a user ID by the Assign User Preferences process. This value is used by the online credit card process.

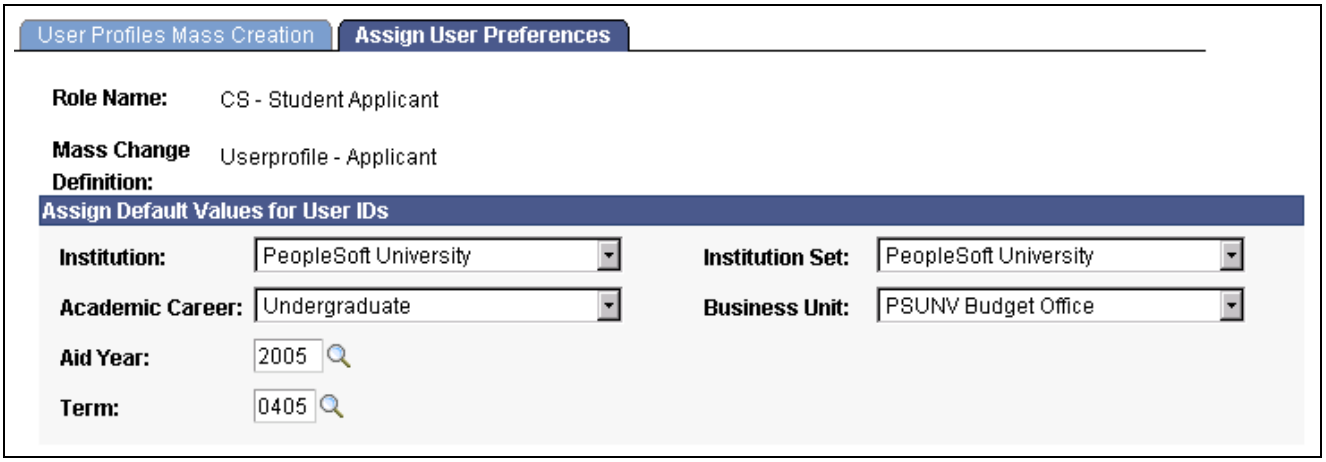
If a user ID already has a business unit associated with it, the business unit is overridden by the Assign User Preferences process if the value that you select on the Assign User Preferences page is different from the user ID's business unit.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "User Profiles"

Assigning User Preferences

Access the Assign User Preferences page.



Assign User Preferences page

The values that you select on this page override the values created for the user ID in the OPR_DEF_TBL_CS table.

Institution, Academic Career, Aid Year, and **Term** — These fields are used as user preferences when the user accesses pages that include these fields.

Institution Set — This value is used by Student Financials. Select a value if you use online credit card processing.

Business Unit — This value is used by Student Financials. Select a value if you use online credit card processing.

See Also

Chapter 15, "Securing Student Financials," Setting Security for Credit Cards, page 263

Running the User Profiles Management Processes

To set up user profile management, use the User Profiles Management component (RUN_CC_USERPROFILE).

Before running the User Profiles Management process, regenerate the mass change that you plan to use.

The User Profiles Management process consists of a series of mass changes templates and definitions, as well as a series of application engine programs.

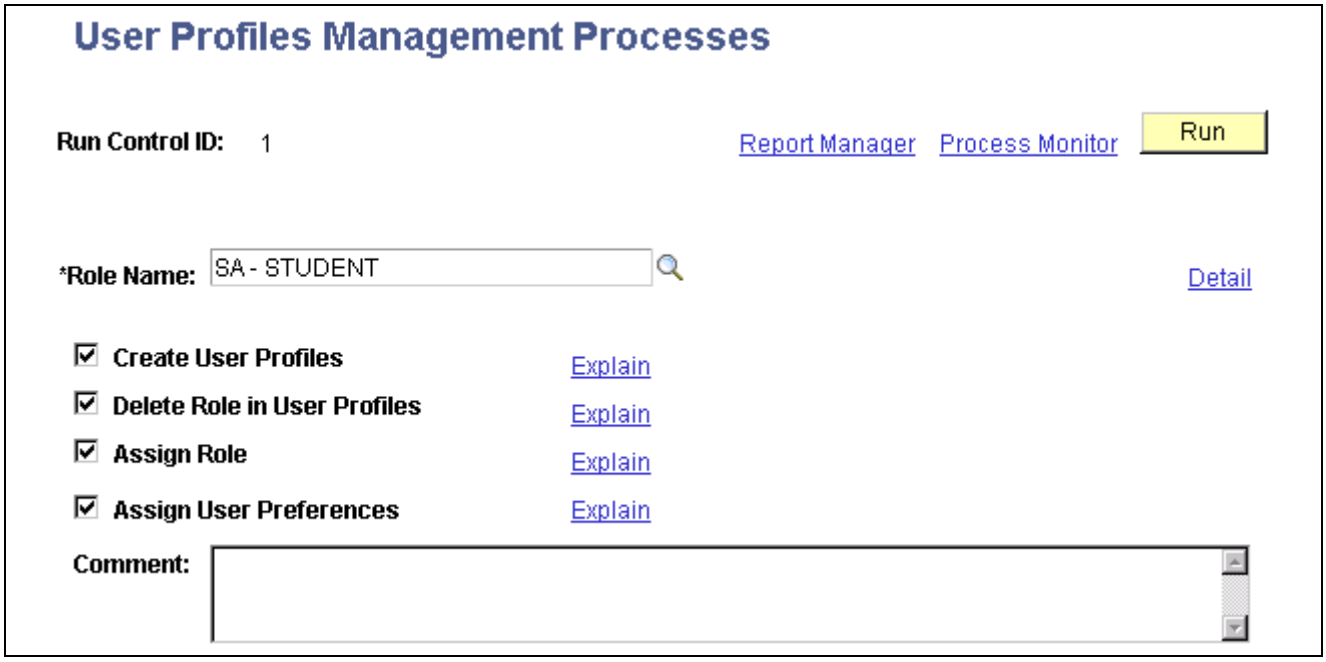
This section discusses how to run the processes that are part of User Profiles Management process.

Page Used to Run the User Profiles Management Processes

Page Name	Object Name	Navigation	Usage
User Profiles Management Processes	RUNCNT_USERPROFILE	Set Up SACR, Security, Secure Student Administration, Process, User Profiles Management	Run any of the four user profile processes. You can create user profiles, delete or assign a role to user profiles, and assign user preferences.

Running the User Profiles Management Process

Access the User Profiles Management Processes page.



User Profiles Management Processes page

Role Name Select the name of the role to create or maintain. The available options correspond to the roles for which you set up a mass change on the User Profile Mass Creation page.

Detail Click to access the User Profiles Mass Creation page, where you can review and modify the setup before running the processes.

The four check boxes represent the four processes that you can run when you run the USERPROFILE Application Engine process. You can select one or more of these check boxes.

Create User Profiles Select to create a user profile for the IDs that are selected by the mass change (if they do not already have user IDs). The role that you selected is also added to the new user IDs. The user IDs and the passwords are based on the algorithms that you select on the User Profiles Mass Creation setup page.

When this check box is selected, the User Profiles Management process creates a temporary table to list all the user IDs that are created. This temporary table is called PS_USRPRF_NWID_TMP.

If on the User Profiles Mass Creation setup page you select to create the result table, this process creates the temporary table.

See *Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table*

Delete Role in User Profiles Select to delete the role from the user IDs that are *not* selected by the mass change. This option deletes the role name on the user profiles that no longer meet the criteria for the specified role name.

For example, to provide self-service access to the applicants of the current term, this function deletes the Applicant role for all the user profiles that have the role but are not part of the current term.

When this process runs, it creates a temporary table so you can review the IDs for which the specified role is removed. The temporary table is called PS_USRPRF_DEL_TMP.

Assign Role Select to assign the role to the existing user IDs that are selected by the mass change.

This process creates a temporary table called PS_USRPRF_ASG_TMP. It lists the user IDs that have the role assigned to them.

Note. This is the same process that you can run from the Dynamic Members page in the PeopleTools, Security, User Profiles, User Profiles, Roles component. If you assign roles using that component, be sure the query that you use has the same criteria as the mass change.

See Chapter 17, "Creating and Maintaining User Profiles," Delivered Mass Changes for User Profiles Management, page 278.

Assign User Preferences Select to assign the user preferences from the Assign User Preferences page. These user preferences are assigned to all user IDs selected by the mass change. If a user ID already has a value set for the preferences, it is overridden by this process (unless a value is added to the institution set override).

If you are using online credit card processing, you should select this process to assign a business unit and an institution set to the user IDs.

The process creates a temporary table called PS_ASSN_SETVAL_TMP. Use this table to review the IDs that have the user preferences assigned to them.

Comment Enter any comments about the selections. The selected settings are associated with the user ID and the run control ID, so when you use the same settings, you can see the comments. This field is for informational purposes only.

Explain Click these links to view the explanation for the selected check box.

Run Run the User Profiles Management Application Engine process (USERPROFILE). When you run this process, do not select a type or a format on the Process Scheduler page.

Error Log Information

An error log (PS_ERR_LOG_USRPRF) is created by the User Profiles Management process that lists any IDs for which a user profile is not created. Review the error log after running any of the processes. In the error log these error codes are used:

1	In the Assign Role Application Engine process, the save method was not completed for the existing user ID. The system also assigns this error code if it encounters an invalid user ID. A valid user ID must meet these conditions: • Has no space. • Has no comma. • Is not equal to PPLSOFT. • Is not longer than 30 characters.
2	In the Create User Profile Application Engine process, the save method was not completed for the newly created user ID.
3	In the Create User Profile process, the newly created user ID cannot be saved because the user ID already exists.
4	In the Create User Profile process, no user ID can be created because *Email* was selected in the For User IDs field on the User Profiles Mass Creation page.
5	In the Delete Role Application Engine process, the save method was not completed for the existing user ID.

After you run the process, you can access the User Profiles Mass Creation page Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation for the role you just ran and click the Populate Selection button to see which user IDs were created. You can also see which business unit and institution set were assigned, if any where defined. In addition, you can also review the temporary tables that are created by the processes.

See Also

Using PeopleSoft Applications, "Working with Processes and Reports"

Generating Password Notification Letters

You can create letters to send notifications to new users whose IDs are created by the User Profiles Management process. You can notify them of their assigned user ID and password using the Letter Generation process.

Note. This section refers to the temporary result table, which includes sensitive information including user IDs and passwords. For security reasons, this PeopleBook does not explain how the temporary result table functions.

This section discusses how to:

- Set up password notification letters.
- Run the letter generation process for password notification letters.

See Also

Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table

Pages Used to Generate Password Notification Letters

Page Name	Object Name	Navigation	Usage
User Profiles Mass Creation	OPER_ROLE_DEFN	Set Up SACR, Security, Secure Student Administration, Setup, User Profiles Mass Creation	Select the users to manage (using a mass change definition) and define other parameters, including the algorithms for creating user IDs and passwords and the model user ID. You can also assign 3C IDs to the user ID that you create.
Letter Generation – General Parameters	RUNCTL_LTRGEN1	Campus Community, Communications, Letter Generation, General Parameters	Run the process that generates password notification letters.

Setting Up the Password Notification Letters

Access the User Profiles Mass Creation page.

To set up information for notification letters and use the Letter Generation process, you must select the appropriate event ID and institution on this page. When the User Profiles Management process runs with the *Create User Profiles* option selected, it invokes the 3C engine. The 3C engine adds communications directly to the communications table, so all of the new users that are created have a communication assigned to their records.

To create password notification letters, the event ID must include a comm key that has been defined with a letter code. You set up the letter code with the function equal to *General* and the SQC name equal to *CCLTRWOL*. Complete this setup on the Standard Letters page.

Warning! Do not modify the SQC named CCLTRWOL.sqr in any way.

When the event ID includes a letter code with the SQC equal to *CCLTRWOL,* the same process creates a temporary result table where all of the new user IDs and passwords are stored. The Letter Generation process reads this table to extract the passwords and the use IDs.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications"

Supplemental Installation Instructions for Campus Solutions Applications: Using the User Profiles Management Result Table

Running the Letter Generation Process (CCLTRGEN) for Password Notification Letters

After you have run the Create User Profiles process, you can run the Letter Generation process to extract the data. To run letter generation access the Letter Generation – General Parameters page.

When you run the Letter Generation process for password notification letters, the system updates the temporary result table with a flag indicating that the data has been extracted and the rows can be deleted from the temporary table. After the temporary table has been cleaned up, a critical error occurs if you attempt to run a communication for password notification letters for those user IDs and passwords.

Note. When running the Letter Generation process for notification letters, make sure both the Produce Communication and Complete Communication check boxes are cleared in the Missing Critical Data group box. If these check boxes are cleared, the system does not extract and complete a communication if critical data (for example, address information) is missing. Consequently, you can add or correct the missing data for the individual ID specified in the log. You can then rerun the Letter Generation process. If you do not rerun the communications, be sure to use the User Profile Clean Up Processes page to delete the rows from the results temporary table, even though the Letter Generation process did not set the ready-to-delete flag. If you run the process with these check boxes selected, the system creates the communication despite the missing data and updates the temporary result table with the flag to indicate that these rows can be deleted.

Warning! When the letter generation process extracts the data, it creates a .DAT file (CCLTRGEN.DAT) and two .CSV files (CCLTR<LETTERCODE>.CSV for letters and CCLBL<LETTERCODE>.CSV for labels). These files are either stored on the temporary directory of the PeopleSoft Process Scheduler server or on the computer where the extract file path has been redirected. (You redirect the extract on the Date/Merge Parameters page of the Letter Generation component.) The passwords in the data extracts are unencrypted. No process automatically deletes the extracts. They are available for running future communications. To prevent misuse, the institution should take the appropriate security measures. For example, be sure to write the extract to a secure directory, verifying that the CCLTRGEN macro points to the same directory. Then manually delete the data extract after you have performed the merge with the letter template.

The extract file (CCLTR<LETTERCODE>.CSV files) that includes the nonencrypted passwords is overridden every time you run the Letter Generation process for the letter code that you set up to run the password notification letters. If you do not plan to run the macro to perform the merge with the data extract and the letter template right away, save the files using a different name. Make sure that they are stored in a secure folder and that they are deleted after the communication is produced.

The PeopleSoft system comes with these items specifically for generating the notification letters:

- A sample Microsoft Word template called CCLTROPR.doc for printing notification letters.

  You can modify the template or use it to create new templates so that you can create different letters. If you use this template and you do not rename it, the letter code that you create must be named OPR.

- A unique SQC called CCLTRWOL.

  The CCLTRWOL SQC generates the variable data necessary for the password notification letters associated with the letter code that you create. You should not modify this SQC.

Example

Here is an example of a password notification letter created with the sample template CCLTROPR.doc:

July 23, 2001
Janice Diller
44125 Ventura Blvd.
Encino, CA 91465

Dear Janice,

Welcome to PeopleSoft University Online! Through the PSU Online site you'll be able to take care of most of your business with the university.

To access your information, you will need the following information:

User ID: WSR6002
Password: EUR2J54A

You are urged to keep this information private - anyone with this information will be able to access your account! Your initial word has been system generated; we recommend that you change it after you login the first time.

What you can do at PeopleSoft University's site depends on the profile we have for you in our records. If you think this is incorrect or incomplete, or if you have any other problems using PeopleSoft University on the web, please contact the computer Services Division at (313) 555-1234.

Registrar

Example of password notification letter

Warning! When you merge the letter template with the extract files, a copy of the letters is saved on the local drive of the computer that was used to merge and print the letters. Be sure to delete these local copies because they contain the nonencrypted passwords.

Resolving Issues for the User Profiles Management Process

This section discusses techniques that enable you to run the User Profiles Management process successfully. If you receive an error or if a process runs unsuccessfully, try these problem solving techniques.

Mass Changes That Select No IDs

If the Count field on the user Profiles Mass Creation page displays *0* after you click the Populate Selection button, the system has selected no IDs for the process. The process runs successfully, but no IDs are created or maintained. In this case, regenerate the mass change using the mass change definition on the Generate SQL page. Be sure to save the mass change. Run the process again. If the count is still showing zero, the criteria may not match any of the data in the database.

Processes That End Abnormally

If a process abnormally ended, the next time you run it may be unsuccessful because of the data stored in these temporary tables:

- PS_ENG_COMM_TMP
- PS_EMPLID_GRP_TMP

If that is the case, delete the tables and run the process again.

User IDs Not Created

If no user ID was created for an ID that was selected by the mass change, look at the error log PS_ERR_LOG_USRPRF and verify if an error code was given. Error codes are documented inside the “Error Log Information” section of this chapter.

See Also

Chapter 17, “Creating and Maintaining User Profiles,” Running the User Profiles Management Process, page 290

CHAPTER 18

Using Mass Change

This chapter provides an overview of mass change in Campus Solutions and discusses how to:

- Process mass change.
- Set up mass change security.
- Define specific parameters for mass change definitions.

Understanding Mass Change in Campus Solutions

Campus Solutions provides many tools to process information. However, because much of what you do is unique to the institution, PeopleSoft enables you to create your own unique processes. One way of doing this is to create mass changes. For communications, checklists, and comments you can also use Campus Community's 3C engine.

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

The PeopleSoft Mass Change utility is a Structured Query Language (SQL) generator that you use to perform high-volume business transactions, such as updating data for multiple students without accessing each student record online. Its function is similar to PeopleSoft Query, but while PeopleSoft Query retrieves data from the database, the PeopleSoft Mass Change utility makes changes to the database.

The PeopleSoft Mass Change utility is commonly used for these tasks:

- Performing high-volume, set-oriented transactions.
- Copying data from table to table.
- Archiving table data.
- Performing transactions not normally supported through the pages.

Note. The mass change types and templates delivered with Campus Solutions should serve as examples for your particular needs. The functionality provided is representative of common business practices; however, you may need to modify the delivered mass change types and templates to fit your specific requirements.

Mass change is a way of breaking down statements that alter data (such as update, insert, and delete statements) into a hierarchy of three components: types, templates, and definitions. The end user only needs to alter the simplest level to change the parameters used in a particular run. The PeopleSoft Mass Change utility includes these three components:

1. *Types* are the lowest level components.

   A mass change type defines the type of SQL statements to be generated, the records involved, and the sequence in which they run. Application developers familiar with SQL and the database design typically define mass change types.

2. *Templates* are built upon mass change types.

   Mass change templates are used to specify which fields make up the WHERE clause of the SQL statement and which fields can be hard-coded with a particular value. Application developers typically define mass change templates.

3. *Definitions* are built upon mass change templates and are generally created and run by end users.

   Mass change definitions are used to specify the values and operators for each field in the statement's WHERE clause and default fields and to generate the actual SQL statement.

You can run mass change definitions individually or combine them into mass change groups and run them together.

Note. Anyone who defines mass change types or templates should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft database in question.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Mass Change"

Processing Mass Changes

Processing mass changes consists of a definition phase and a processing phase. First, you define the selection criteria and changes for the selected data; then you run the Structured Query Reports (SQRs) that process the changes you defined.

Note. The development staff must create mass change types and templates before you can use the mass change definitions discussed in this section.

This section discusses how to:

- Define the mass change.
- Process the mass change.

Pages Used for Processing Mass Changes

Page Name	Object Name	Navigation	Usage
Description	MC_DEFN_00	• Checklists, Mass Change - Checklists, Mass Change Definition, Description • Communications, Mass Change - Communications, Mass Change Definition, Description • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Description • Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Description • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Description	Define the mass change.
Criteria and Defaults	MC_DEFN_01	• Checklists, Mass Change - Checklists, Mass Change Definition, Criteria and Defaults • Communications, Mass Change - Communications, Mass Change Definition, Criteria and Defaults • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Criteria and Defaults • Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Criteria and Defaults • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Criteria and Defaults	Define criteria and set defaults for mass change.

Page Name	Object Name	Navigation	Usage
Student Administration	MC_DEFN_SA	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Student Administration • Campus Community, Communications, Mass Change - Communications, Mass Change Definition, Student Administration • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Student Administration • Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Student Administration • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Student Administration	Set specific parameters for the mass change definitions. The resulting mass change SQL statements include these parameters.
Generate SQL	MC_DEFN_02	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Generate SQL • Campus Community, Communications, Mass Change - Communications, Mass Change Definition, General SQL • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Generate SQL • Student Admissions, Processing Applications, Mass Change, Mass Change Definition, General SQL • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Generate SQL	Generate the SQL to run the mass change.

Page Name	Object Name	Navigation	Usage
Execution History	MC_DEFN_03	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Execution History • Campus Community, Communications, Mass Change - Communications, Mass Change Definition, Execution History • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition, Execution History • Student Admissions, Processing Applications, Mass Change, Mass Change Definition, Execution History • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, Execution History	View the history of a mass change execution.
Group Definition	MC_GROUP_01	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group • Campus Community, Communications, Mass Change - Communications, Mass Change Group • Student Admissions, Processing Applications, Mass Change, Mass Change Group	Combine mass change definitions into a group and set the execution sequence.

Page Name	Object Name	Navigation	Usage
Run Mass Change	RUN_MASSCHNG	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group • Campus Community, Communications, Mass Change - Communications, Mass Change Group • Records and Enrollment, Enroll Students, Block Enrollment, Run Mass Change • Student Admissions, Processing Applications, Mass Change, Run Mass Change	Execute the mass change.
Mass Change Result	MC_CHK_RESULT	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Group • Campus Community, Communications, Mass Change - Communications, Mass Change Group • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Group • Student Admissions, Processing Applications, Mass Change, Mass Change Group	View mass change results.

Defining the Mass Change

The definition phase comprises these steps:

1. Choose a mass change template and use it to create a mass change definition.
2. Outline the criteria for selecting rows and identify the columns and values to be changed.
3. Generate the SQL statement.

Processing the Mass Change

The processing phase comprises these steps:

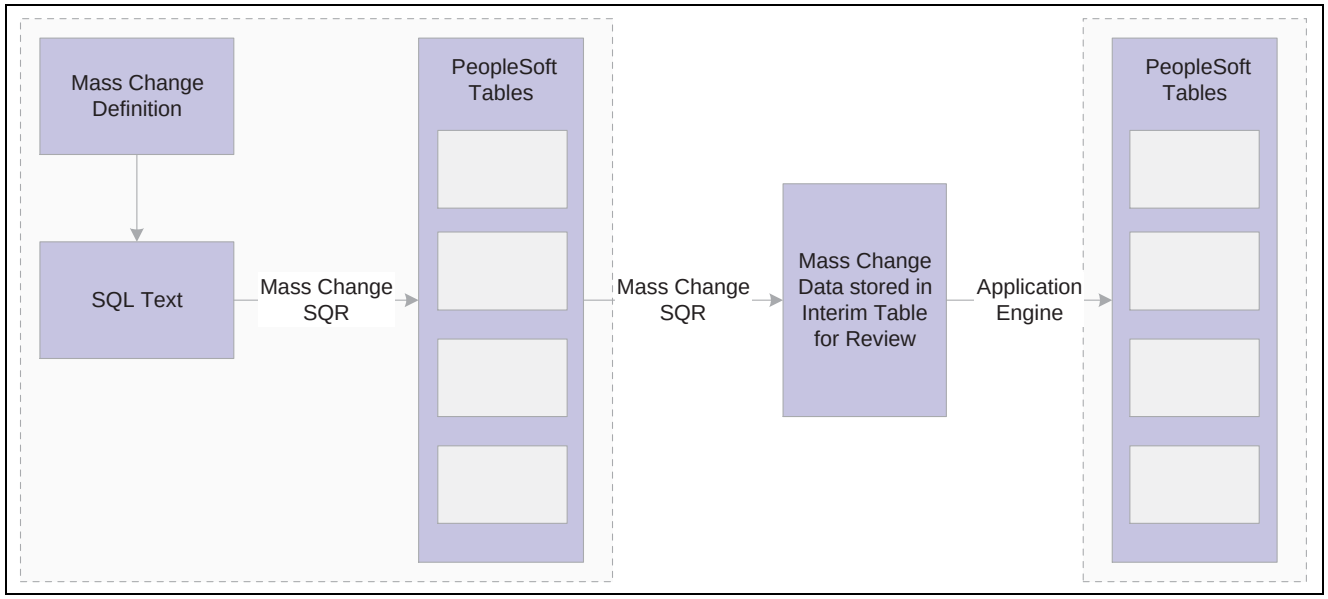
1. Run the Mass Change SQR to select, change, and transfer the data to the temporary tables.
2. Review the data for accuracy (optional, but recommended).

PeopleSoft delivers certain features that enable you to review the mass change results. Results of mass change definitions can be viewed using the Mass Change Result page (one of the locations is Campus Community, Communications, Mass Change - Communications, Mass Change Results). Other Campus Solutions applications also have pages for reviewing mass change results. These are described in the PeopleBook for the application.

3. Run the appropriate process to load the data from the temporary tables into the PeopleSoft tables (if applicable).

   For example, to insert communications or checklists, you run the 3C Engine process to insert the mass change results into the PeopleSoft tables.

The graphic below illustrates mass change integration:



Mass change in Campus Solutions

Setting Up Mass Change Security

Prior to using the PeopleSoft Mass Change utility for the first time, you should consider who in the organization should be authorized to use mass change templates and run mass changes. Because the PeopleSoft Mass Change utility is a powerful tool with the ability to modify large portions of the data, PeopleSoft recommends that you carefully consider mass change security.

Mass change security governs whether users assigned to a particular permission list can run mass changes online, the templates available to a user, and what mass changes the user can run. To set Mass Change security, go to PeopleTools, Security, Permissions & Roles, Permission Lists, Mass Change.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Mass Change"

Defining Specific Parameters for Mass Change Definitions

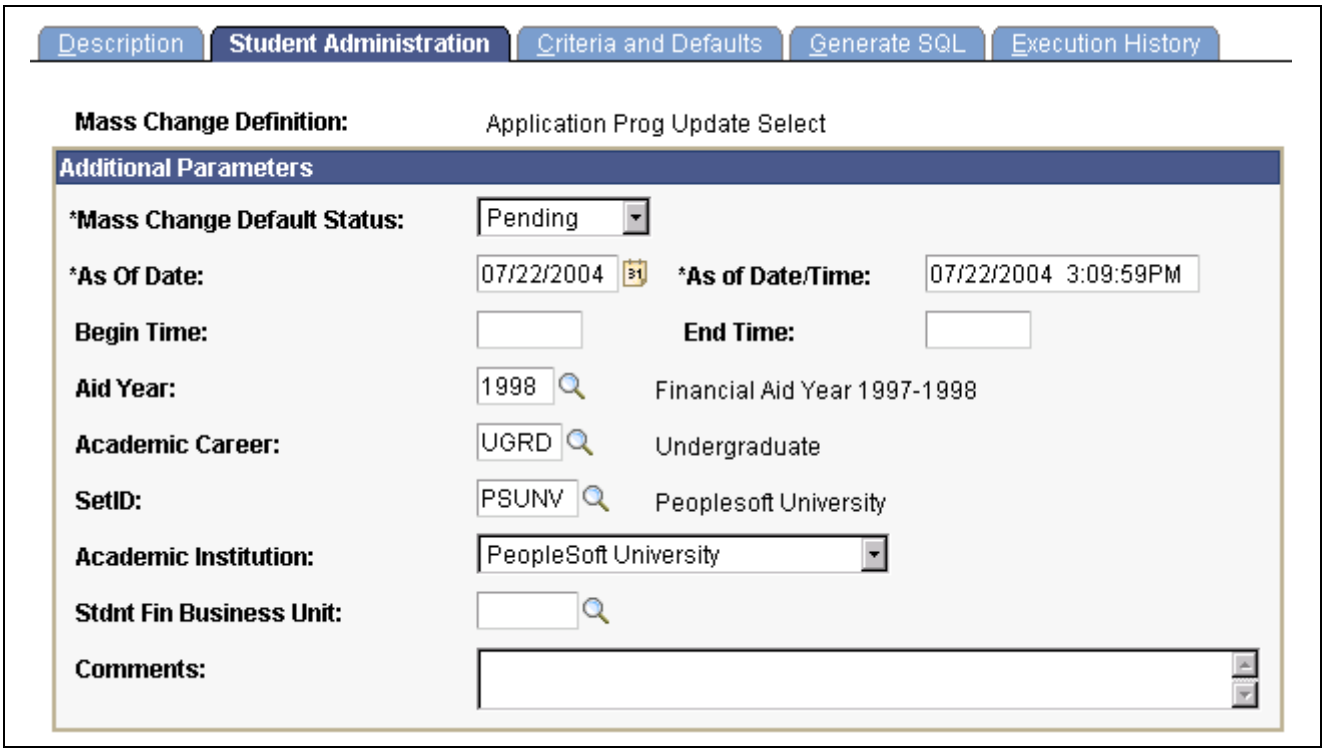
The Student Administration page in the Mass Change Definition component enables you to specify additional parameters that are used only in Campus Solutions.

Page Used to Define Specific Parameters for Mass Change Definitions

Page Name	Object Name	Navigation	Usage
Student Administration	MC_DEFN_SA	• Campus Community, Checklists, Mass Change - Checklists, Mass Change Definition, Student Administration • Campus Community, Communications, Mass Change - Communications, Mass Change Definition • Records and Enrollment, Enroll Students, Block Enrollment, Mass Change Definition • Student Admissions, Processing Applications, Mass Change, Mass Change Definition • Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change	Set specific parameters for the mass change definitions. The resulting mass change SQL statements include these parameters.

Setting Specific Parameters for Mass Change Definitions

Access the Student Administration page.



Student Administration page

Mass Change Default Status

This field is not used by Campus Solutions.

This field value sets the status value of all mass change records created when you run this mass change definition. The default status is used with mass change definitions run using database agents. Campus Solutions mass change definitions are not delivered to use database agents.

As Of Date

The current date appears by default. The value for this field must be the current date for the mass change definition to run. This field is used as a default date in certain mass change definitions.

Note. Even if the date defaults to today's date, you must regenerate and save the mass change definition before using it. This way it will select the people in the database that meet the criteria as of today. If not it will use the last date you generated and saved the mass change definition.

As of Date/Time

The current date and time appears by default when you access the page. The value for this field must be the current date and time for the mass change to run. If you make a change to the mass change definition, you must save it before you run it.

Begin Time and **End Time**

Not currently used.

Aid Year, Academic Career, SetID, Academic Institution and **Stdnt Fin Business Unit** (student financials business unit)

Enter values to be used as defaults by the mass change definition. These values are also used for prompting in the Criteria and Defaults page.

Comments

Enter any comments about this mass change definition.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Mass Change"

CHAPTER 19

Setting User Defaults

This chapter discusses how to:

- Enter user defaults.
- Define Contributor Relations user defaults.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "User Profiles"

Entering User Defaults

To set up user defaults, use the User Defaults component (RUN_CC_USERPROFILE).

The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system. User defaults (which are optional) can save time and minimize data entry errors.

You need to be familiar with the pages and fields that default settings affect before you specify defaults. This chapter does not describe the functionality of the particular fields discussed here. Those fields are documented in the relevant application PeopleBooks.

Note. When you select default values for fields, you can select only those values for which the user ID has security access.

This section discusses how to:

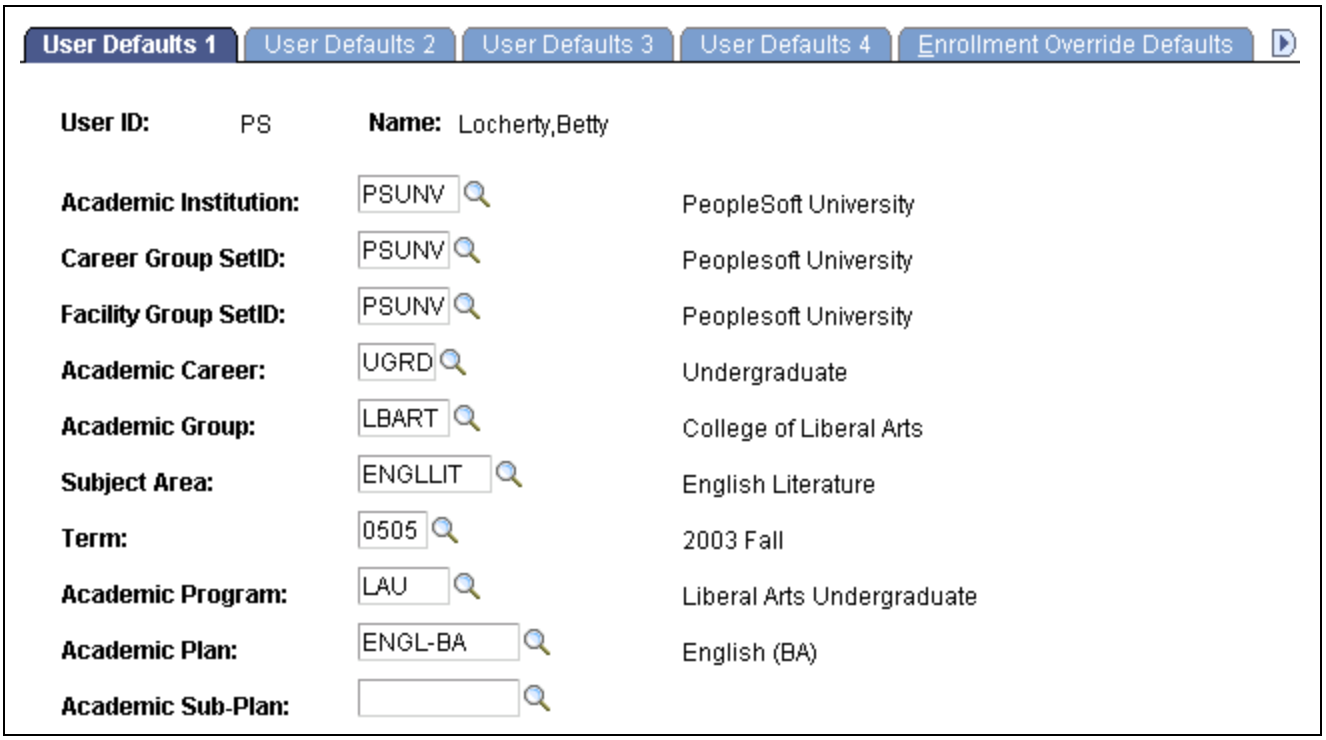
- Set defaults for academic information.
- Set defaults for financial and admissions data.
- Set defaults for admissions application data.
- Set defaults for printing transcripts, award notifications, and Student and Exchange Visitor Information System (SEVIS).
- Set defaults for enrollment overrides.
- Set defaults for communication keys.
- Select the type of communication, checklist, and comment (3C) group access.

Pages Used to Enter User Defaults

Page Name	Object Name	Navigation	Usage
User Defaults 1	OPR_DEF_TABLE_CS1	Set Up SACR, User Defaults, User Defaults 1	Set defaults for the Academic Institution field, Term field, Career field, Academic Program field, and other fields.
User Defaults 2	OPR_DEF_TABLE_CS2	Set Up SACR, User Defaults, User Defaults 2	Set defaults for the setID field, Aid Year field, Application Center field, Cashier's Office field, and other fields.
User Defaults 3	OPR_DEF_TABLE_CS5	Set Up SACR, User Defaults, User Defaults 3	Set defaults for admissions application data.
User Defaults 4	OPR_DEF_TABLE_CS4	Set Up SACR, User Defaults, User Defaults 4	Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.
Enrollment Override Defaults	OPR_DEF_TABLE_CS3	Set Up SACR, User Defaults, Enrollment Override Defaults	Set default enrollment overrides for a specified user ID.
Communication Speed Keys	OPR_SPDKEY_FUNC	Set Up SACR, User Defaults, Communication Speed Keys	Set default values for communication keys for a particular user ID.
User 3C Groups Summary	OPR_GRP_3C_SUM	Set Up SACR, User Defaults, User 3C Groups Summary	Select the type of 3C group access by specifying inquiry or update access for data in 3C groups.

Setting Defaults for Academic Information

Access the User Defaults 1 page.



User Defaults 1 page

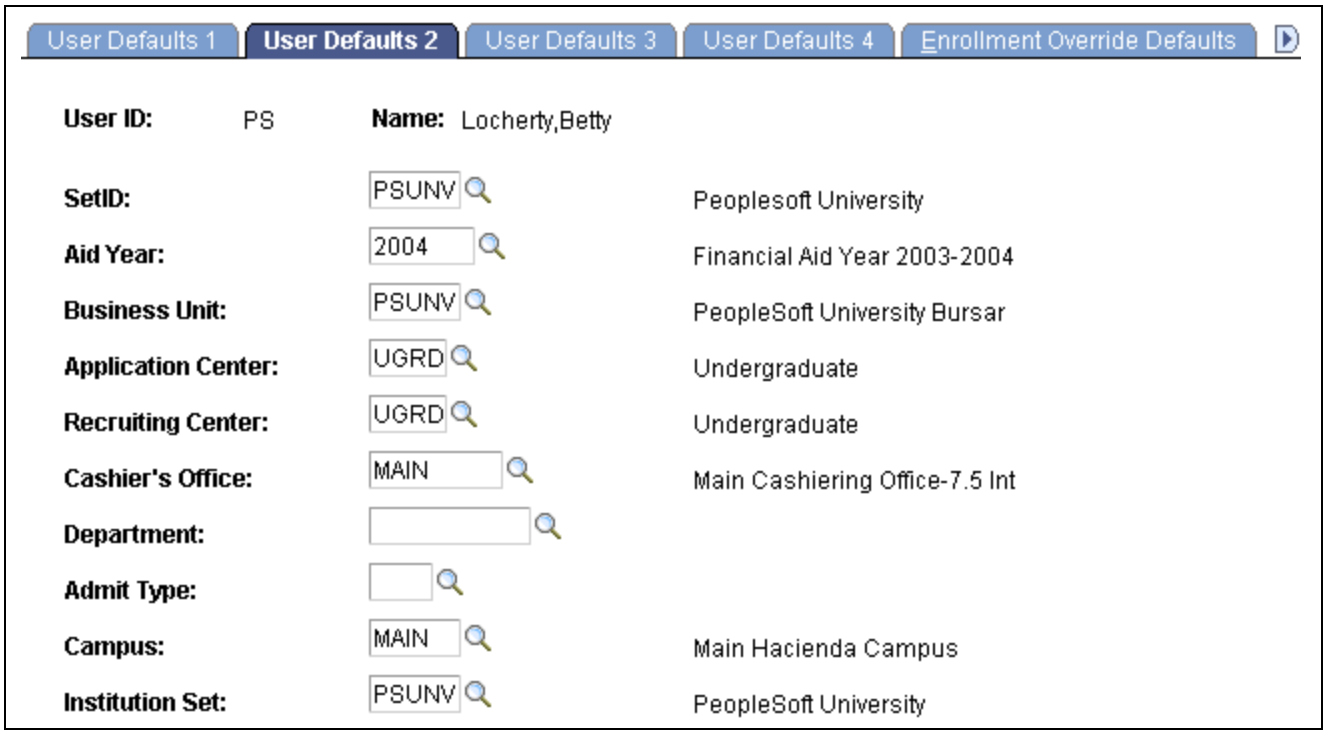
Select the default values for fields on this page. You can set default values for some fields but not others. All fields are optional.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook

Setting Defaults for Financial and Admissions Data

Access the User Defaults 2 page.



User Defaults 2 page

Select default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

See Also

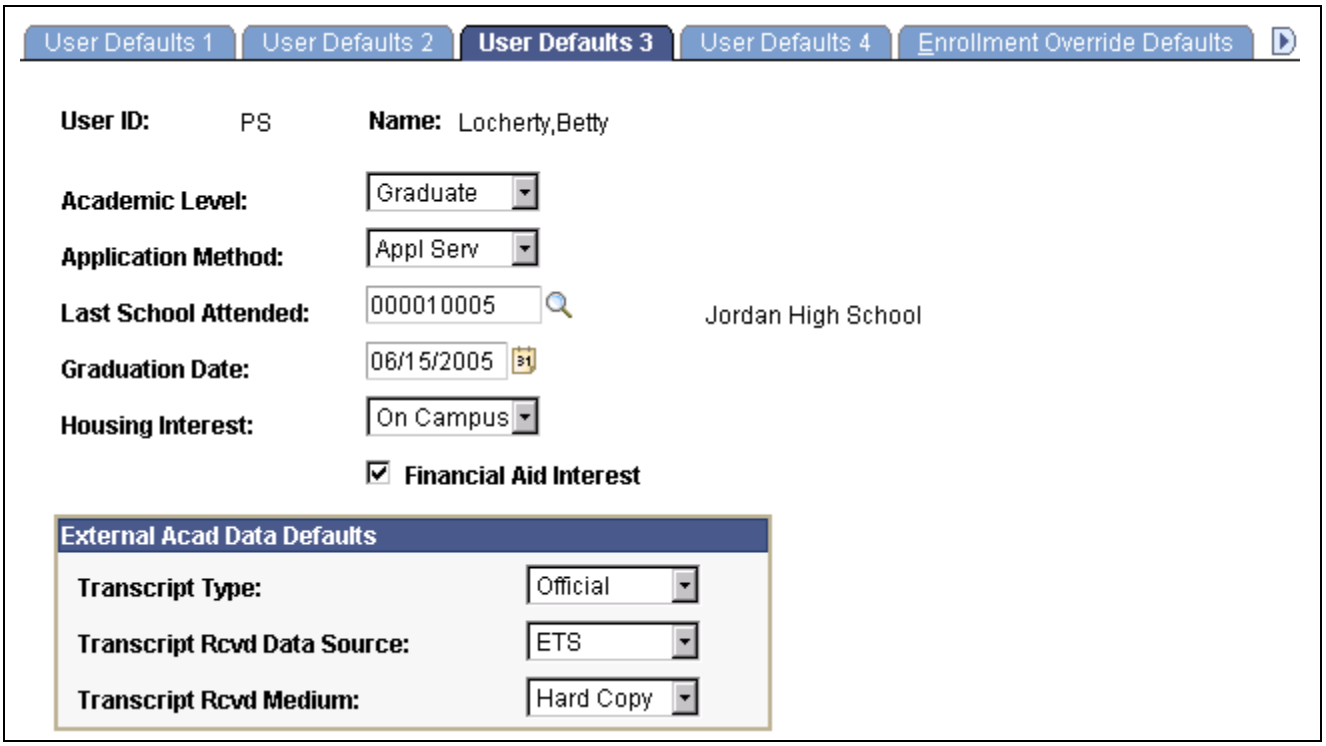
PeopleSoft Enterprise Financial Aid 8.9 PeopleBook

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook

PeopleSoft Enterprise Student Financials 8.9 PeopleBook

Setting Defaults for Admissions Application Data

Access the User Defaults 3 page.



User Defaults 3 page

Select default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

Academic Level Select an academic level for the applicant, such as *Freshman, Junior*, or *Not Set.*

Application Method Select the medium by which the institution received the student's application, such as *Diskette, Hard Copy,* or *Web Appl* (web application).

Last School Attended Enter a value in this field if you receive numerous applications from a particular school. The values depend on the options that have been set up in the system.

Graduation Date Enter a value here if many applicants share the same graduation date. There is no delivered default value for this field.

Housing Interest Select *Commuter, Off Campus,* or *On Campus.*

Financial Aid Interest Select to have the Financial Aid Interest indicator set by default in the admissions application information.

External Acad Data Defaults (external academic data defaults)

Transcript Type Select *Official* or *Unofficial* for this field to indicate if a transcript is official or unofficial.

Transcript Rcvd Data Source (transcript received data source) Select the data source used to transmit the academic transcript to the institution.

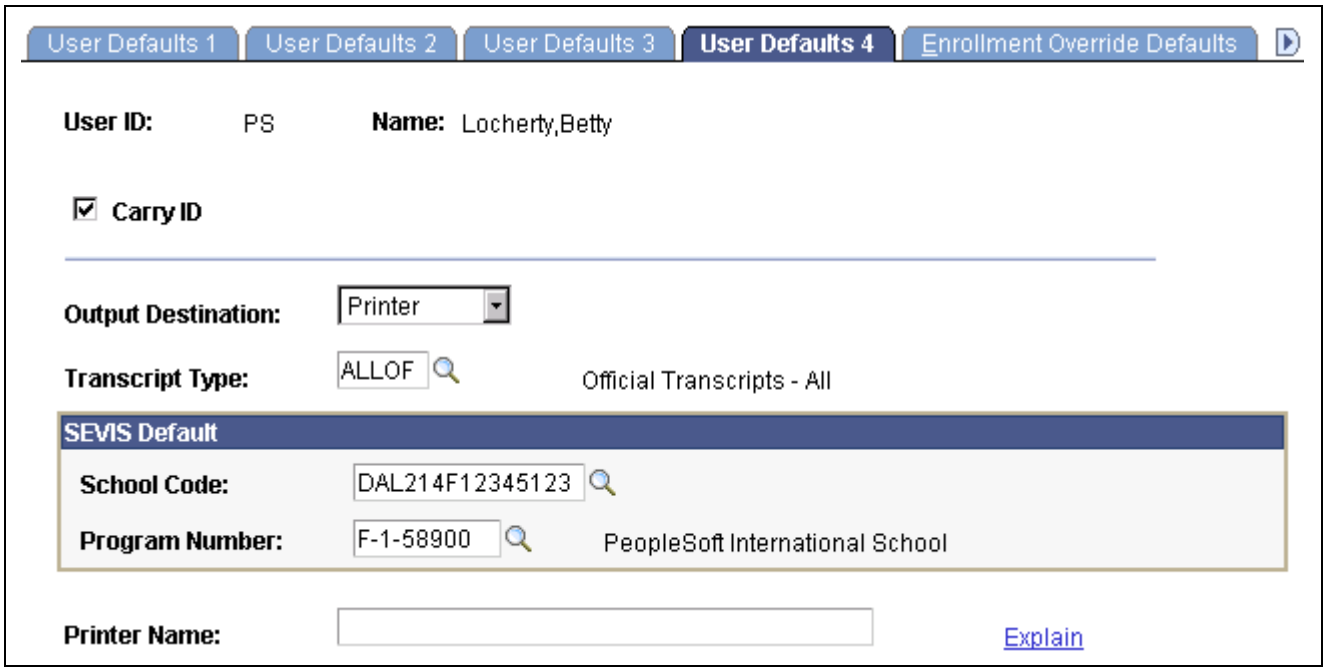
Transcript Rcvd Medium (transcript received medium) Select *EDI* or *Hard Copy* to indicate the medium by which the transcript is received at the institution.

See Also

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook

Setting Defaults for Printing Transcripts, Award Notifications, and SEVIS

Access the User Defaults 4 page.



User Defaults 4 page

Carry ID Select to have the system carry the ID of the last entered (or selected) individual or organization from search box to search box and from page to page. If you select the Carry ID option, you do not have to repeatedly enter or select the ID when you modify or review data for an individual or organization.

Output Destination Select the default destination for printing transcripts. Select *EDI, Page,* or *Printer.*

Note. Output destination values are shipped with the system as translate values. Do not modify these translate values in any way. Any modifications of these values requires a substantial programming effort.

Transcript Type Select the default value for the type of transcripts that you generally print. The options depend on which values are set up in the system.

Printer Name List the default PostScript printers that you use to print award notifications. Click theExplain link for more detailed information.

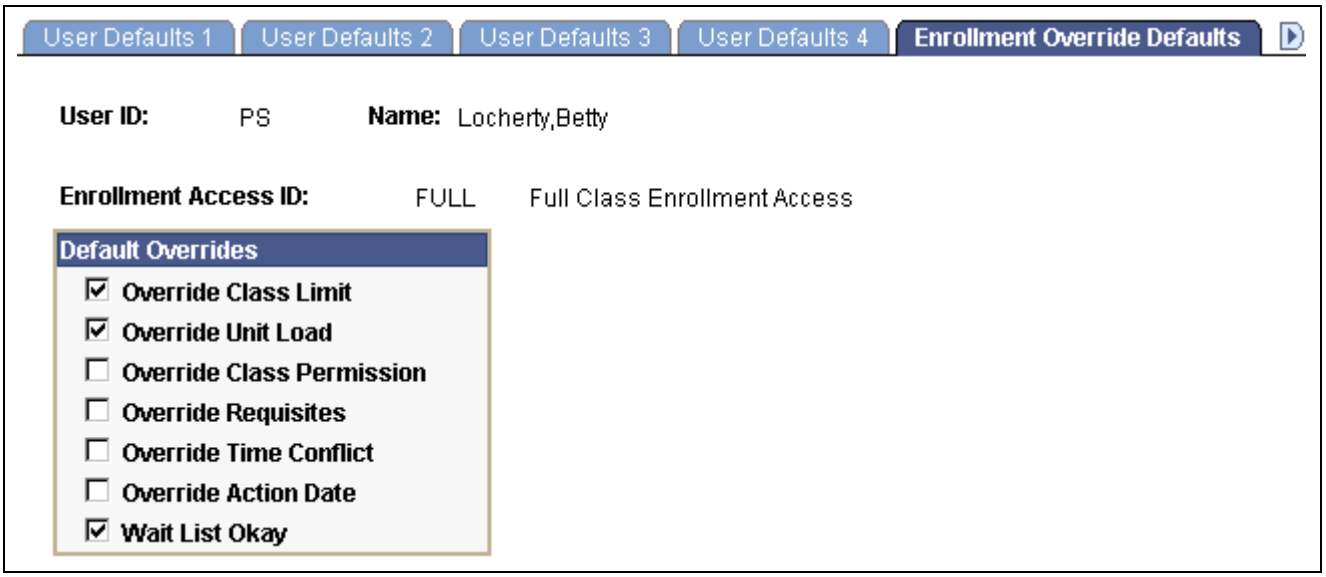
SEVIS Default

School Code Select the default school code that populates fields in the SEVIS F/M Visa components.

Program Number Select the default program sponsor number that populates fields in the SEVIS J Visa components.

Setting Defaults for Enrollment Overrides

Access the Enrollment Override Defaults page.



Enrollment Override Defaults page

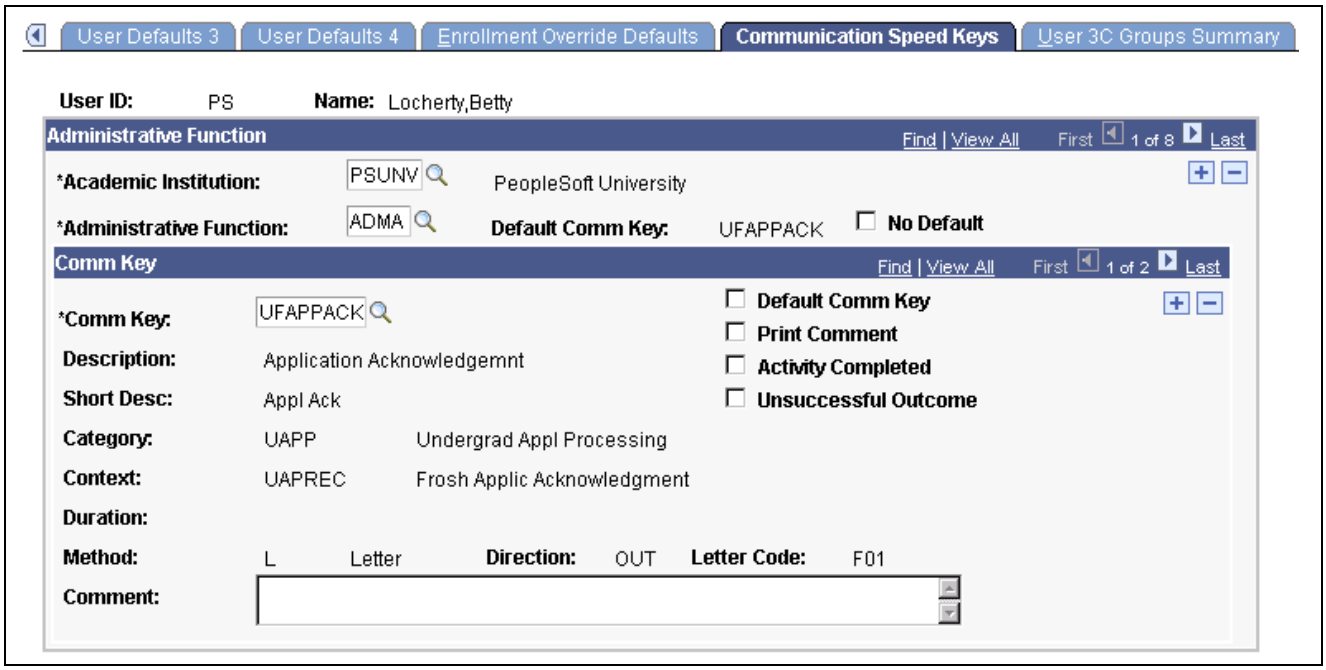
Select the default overrides for the enrollment access ID shown. Only those overrides to which an enrollment access ID has access can be set as defaults. The overrides selected here are set during the enrollment access ID setup. You can override these settings.

See Also

Chapter 14, “Securing Student Records,” Setting Up Enrollment Access IDs, page 234

Setting Defaults for Communication Keys

Access the Communication Speed Keys page.



Communication Speed Keys page

Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own communication keys in addition to the base communication keys.

Administrative Function

Set default communication keys for multiple administrative functions by adding a row for each administrative function.

Academic Institution Select the academic institution for the administrative function.

Administrative Function Select the administrative function to which the default communication key is assigned.

Default Comm Key (default communication key) Displays the communication key that you select as the default for the administrative function.

No Default If you do not want to specify a default communication key for an administrative function, either select this check box or do not select a default communication key in the Comm Key (communication key) scroll area. The Default Comm Key field remains blank.

Comm Key

You can define only one default communication key for each administrative function. You can set multiple communication keys (or comm keys) by adding rows in the Comm Key scroll area.

Comm Key (communication key) Select the comm key that you want to use as a default for the administrative function. After you enter a value in this field, the *Category, Context, Method* and other comm key values appear.

Default Comm Key (default communication key) Select this check box to set this comm key as the default for the administrative function.

Print Comment Select to have the system set the Print Comment flag to *True* by default for communications using this comm key.

Activity Completed Select to have the system set Activity Completed flag to *True* by default for communications using this comm key.

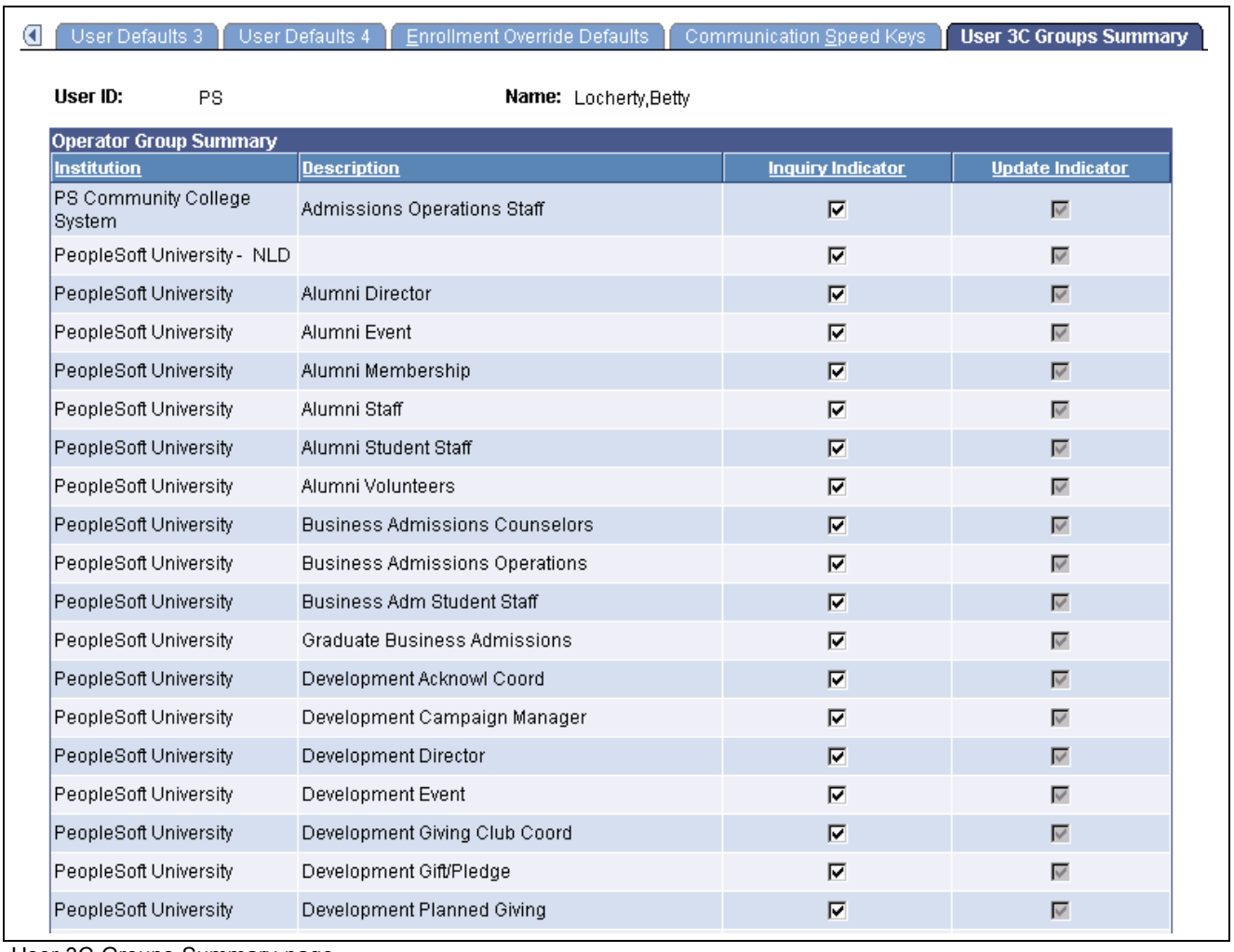
Unsuccessful Outcome Select to have the system set the Unsuccessful Outcome flag to *True* by default for communications using this comm key.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications"

Selecting the Type of 3C Group Access

Access the User 3C Groups Summary page.



User 3C Groups Summary page

You can see only those items associated with the 3C groups to which you have access, as indicated by the selected check boxes. You can temporarily disable access to specific 3C groups that you do not want to view each time. Clear the Inquiry Indicator check box for those groups that you do not want to include in the default. The Update Indicator check box appears if the user can enter and edit data in the 3C group. Users cannot change update access on this page.

See Also

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

Defining Contributor Relations User Defaults

To set up Contributor Relations user defaults, use the Operator Defaults component (AV_OPR_DEF1).

This section discusses how to:

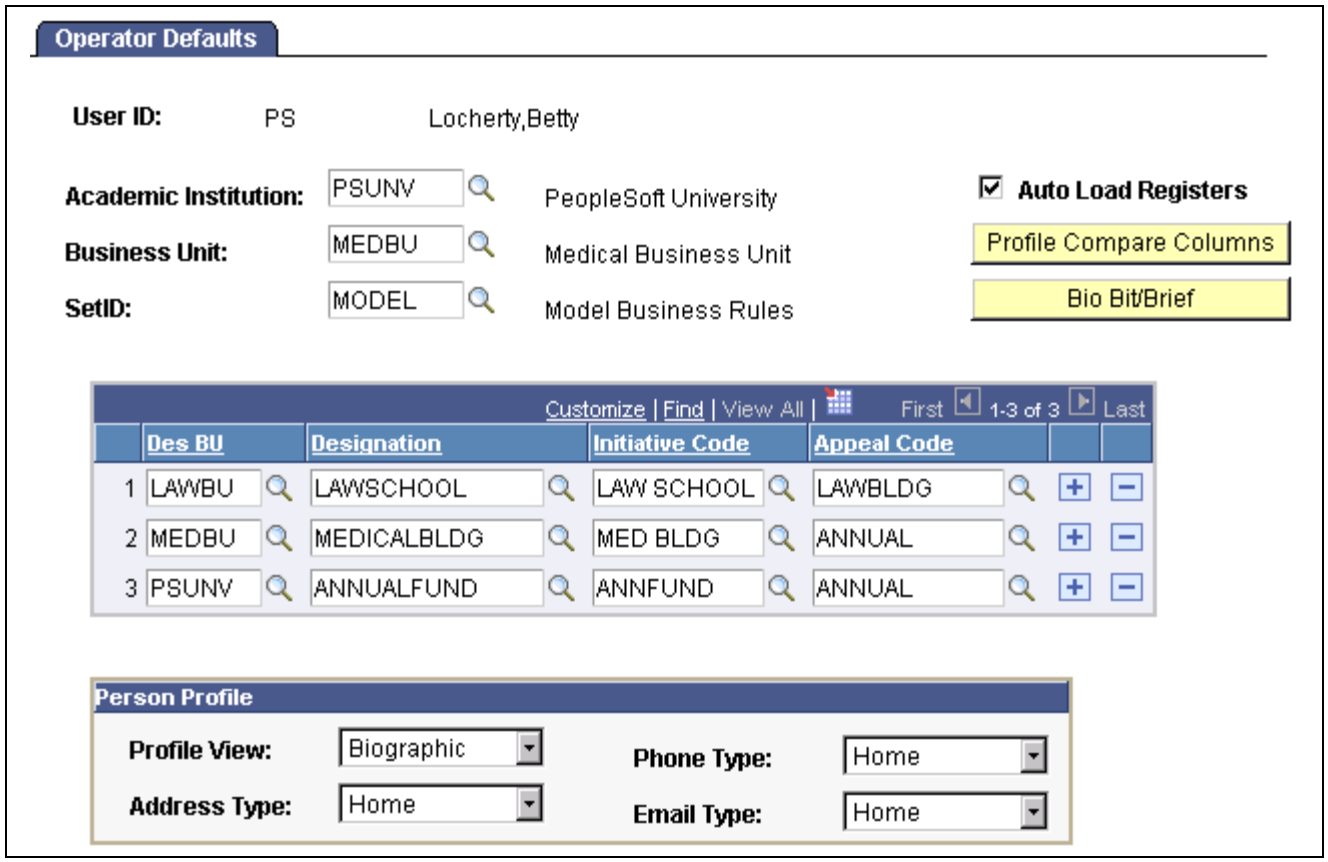
- Set operator defaults.
- Select default columns for the Profile Compare page.
- Specify custom setup for the Bio Bit and Bio Brief reports.

Pages Used to Define Contributor Relations User Defaults

Page Name	Object Name	Navigation	Usage
Operator Defaults	AV_OPR_DEF1	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Operator Defaults	Select default system values based on the user ID.
Select Profile Compare Columns	AV_PROF_CMP_DEF_SP	Click the Profile Compare Columns button on the Operator Defaults page.	Set up the default columns that appear in the grid on the Profile Compare page.
Custom Bio Bit/Brief Setup	AV_BIO_CUST_SP	Click the Bio Bit/Brief button on the Operator Defaults page.	Set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the Custom field on the Biographic Profile page.

Setting Operator Defaults

Access the Operator Defaults page.



Operator Defaults page

Academic Institution Select the default academic institution for the current user. This academic institution appears by default on all pages where an institution is required, but it can be overridden. The full name of the academic institution that you select appears next to this field.

Business Unit Select the default business unit for the current user. This business unit appears by default on all pages where a business unit is required, but it can be overridden. The full name of the business unit that you select appears next to this field.

SetID Select the default setID for the current user. This setID appears by default on all entry pages where a setID is required, but it can be overridden. The full name of the setID that you select appears next to this field.

Auto Load Registers Select to automatically load data with the defaults that the user selects on this page when you access the Commitment Register and Transaction Register pages.

Profile Compare Columns Click to set up the default columns that appear in the grid on the Profile Compare page. The Select Profile Compare Columns page appears. You set default columns here, but you can change the columns on a temporary basis on the Profile Compare page as well.

Bio Bit/Brief Click to set up the default items included in customized Bio Bit and Bio Brief reports that you generate. You can create a name for the default report and specify which items are included. The reports that you define here appear as available options in the Custom field on the Biographic Profile pages.

Des BU (designation business unit) Select the default designation business unit to appear when entering gift or pledge transactions in the system. The designation business unit is the default business unit to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.

Designation Select the default designation to appear when entering gift or pledge transactions in the system. The designation is the default designation to which commitments are allocated. These defaults can be overridden on the Session Defaults page within a session and on the entry page.

Initiative Code Select the default initiative code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.

Appeal Code Select the default appeal code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden on the Session Defaults page within a session.

Person Profile

The values that you select here determine a user's default views of information on the Person Profile page.

Profile View Select the profile view—*Biographic, Commitment,* or *Participation*—that appears.

Address Type Select that address type that appears.

Phone Type Select the phone type that appears.

Email Type Select the email type that appears.

Selecting Default Columns for the Profile Compare Page

Access the Select Profile Compare Columns page.

Select the check box next to each field to appear as a default column on the Profile Compare page.

Specifying Custom Setup for the Bio Bit and Bio Brief Reports

Access the Custom Bio Bit/Brief Setup page.

Enter the name of the default report, and then select the check box next to each item to include in the report.

Relationship information is broken down by the following selections:

Item	Included Relationship Types
Spouse Info. (spouse information)	Spouse

Item	Included Relationship Types
Family Info. (family information)	Brother, Daughter, Father, Grandfather, Other Relation, Son, Step-Father Sister, Self, and Step Mother
Other Relation	Employee, Employer, Friend, Ln Co-Makr, Ln-Refernc, Ln Co-Sign, Neighbor, None Indi, Other, Partner, Roommate, and Works for

CHAPTER 20

Working with PeopleSoft Directory Interface for Campus Solutions

This chapter provides an overview of PeopleSoft Directory Interface for Campus Solutions customers. If you have also licensed the PeopleSoft Enterprise HRMS application, also refer to the *Working with PeopleSoft Directory Interface for PeopleSoft HRMS* chapter. This chapter also discusses how to:

- Load data for Campus Solutions.
- Use PeopleSoft Directory Interface with Campus Solutions.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with PeopleSoft Directory Interface for PeopleSoft HRMS"

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that is maintained in the Campus Solutions database with the Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

Prerequisite

Before you can use the PeopleSoft Directory Interface, you must first select the product on the Installation page (Set Up HRMS, Install, Installation Table, Products).

Loading Data for Campus Solutions

After you set up PeopleSoft Directory Interface, you can load the data into the directory using either the Directory Load process or the DSMAPINPUT FullSync process.

The Directory Load process sometimes experiences performance issues when loading a large volume of data. To avoid these issues, use the DSMAPINPUT FullSync process to load person data (instead of using the Directory Load process).

Note. Both the DSMAPINPUT FullSync and the Directory Load processes overwrite any existing data in the directory. Use one or the other. The Directory Load process is documented in the *PeopleSoft Directory Interface* PeopleBook.

See Also

PeopleSoft Enterprise Components 8.9 PeopleBook: PeopleSoft Directory Interface

Using PeopleSoft Directory Interface with Campus Solutions

This section discusses how to:

- Access sample mappings and delivered messages.
- Use sample mappings.
- Review delivered messages.
- Use best practices when working with maps.

Accessing Sample Mappings and Delivered Messages

If you have licensed PeopleSoft Directory Interface, the system provides sample mappings and messages for both HRMS applications and Campus Solutions applications.

See Also

PeopleSoft Enterprise Components 8.9 PeopleBook: PeopleSoft Directory Interface

Using Sample Mappings

To use sample mappings that are delivered with the PeopleSoft system, establish directory IDs in the Directory Configurations component and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

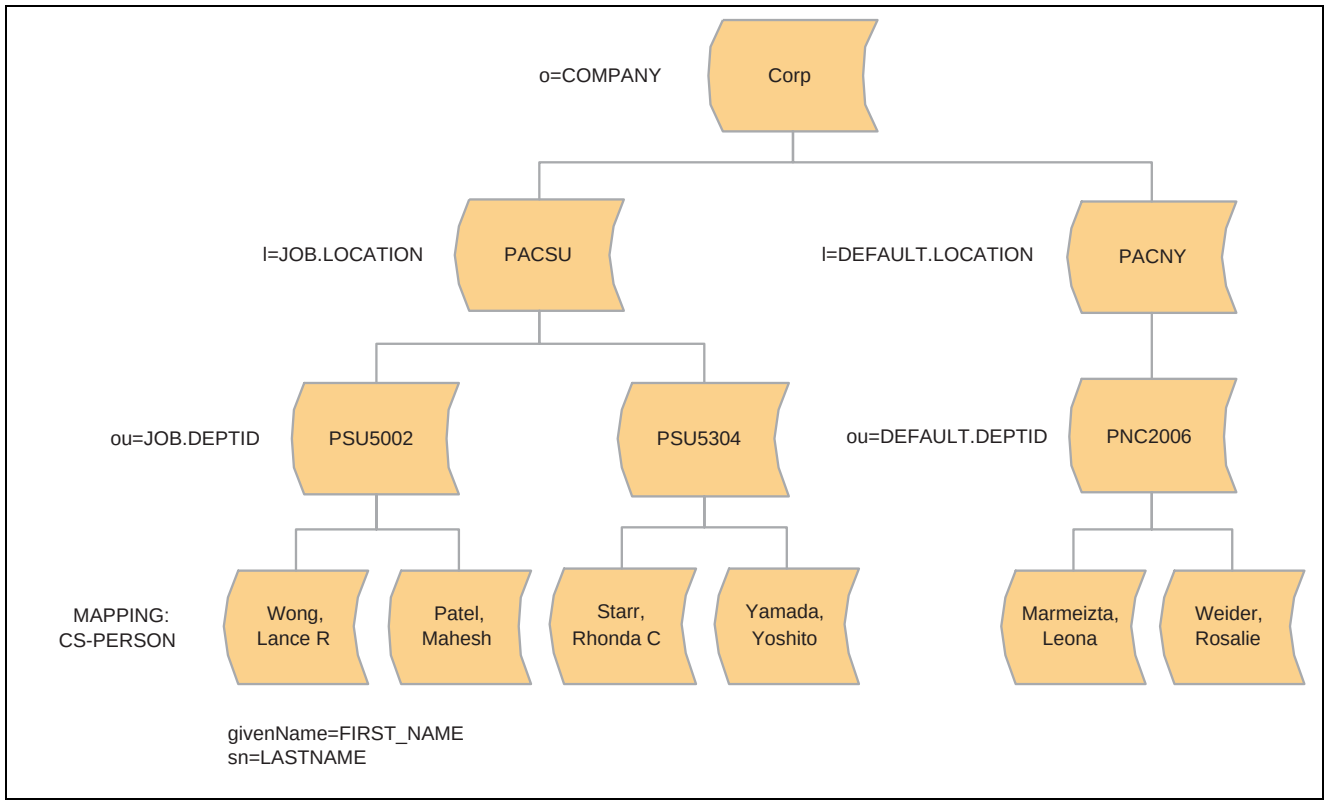
For Campus Solutions customers, PeopleSoft Directory Interface delivers two sets of sample maps for Applicant, Advisor/Instructor, Student and CS Person. One set is for the use of a hierarchical directory interface tree (that contains multiple nodes, such as organizational unit *ou* or location *l*), and one set for the use of a flat directory interface tree (for example that has no node in between the common name *cn* and the organization *o*). The sample map names delivered for a flat directory interface tree end with *_FLAT*.

The hierarchical sample maps are useful for customers that have licensed the HRMS application and are using maps similar to the ones provided for HRMS. Even if the student population (mostly persons of interest, POIs) will likely not be assigned a department and a location, you can set a default value inside the maps for these two nodes. Set up DN default values on the DN Defaults page (Enterprise Components, Directory Interface, Mappings, Directory Maps, DN Defaults). When you set up DN default values, you allow the system to use the same DN for all of the person IDs, regardless of whether they have the necessary data to be placed underneath a node. If a POI is hired at a later time and assigned a department ID and a location, PeopleSoft Directory Interface moves the person into the newly specified department and location branches, In this way, PeopleSoft Directory Interface ensures that only one entry exists in the directory for a specific person.

Note. The system uses DN default values only if the values of the Record field where they're defined are blank; if the Force check box is selected, the system overwrites the Record. You can use DN default values to force all POIs without a department ID and location into a predefined directory branch by setting the appropriate values on the DN defaults page.

The *PeopleSoft Common Components: PeopleSoft Directory Interface PeopleBook* explains how to set up a DN.

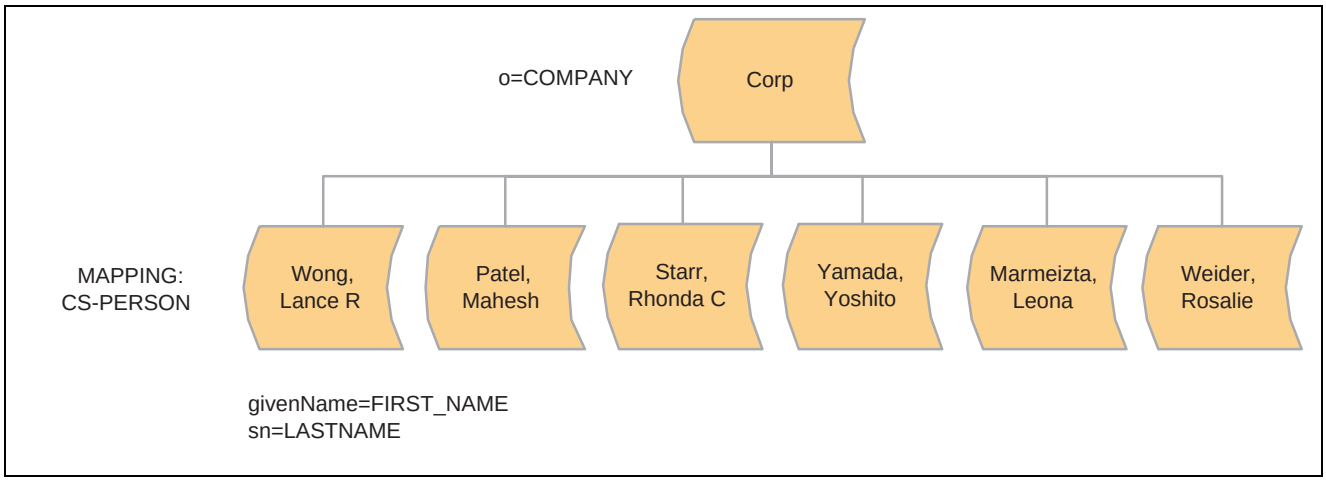
Hierarchical sample maps have the following structure:



Campus Solutions Sample Directory Interface tree: hierarchical

The flat maps style can be used for Campus Solutions customers that have not licensed the HRMS application. It keeps the data in the directory placed under the same node and also prohibits duplicate entries. Note that flat maps do not require you to use DN default values.

Flat sample maps have the following structure:



Campus Solutions Sample Directory Interface tree: flat

Note. Even if PeopleSoft Directory Interface delivers hierarchical maps for HRMS, you could use a flat tree instead, where no nodes exist between the common name *cn* and the organization *o*.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Reviewing Delivered Messages

The following sections describe the delivered sample messages and PeopleCode functions that are related to the directory mappings.

Directory Interface Messages

PeopleSoft Directory Interface delivers the following sample messages for mapping Campus Solutions data to the directory.

Message Name	Directory Entry
DSPERSON_BASIC_SYNC DSPERSON_BASIC_SYNC_EFF	Person Entry
DSADVSR_SYNC DSADVSR_SYNC_EFF DSMAPINPUT_ADVSR	Advisor/Instructor Entry
DSAPPLICANT_SYNC DSAPPLICANT_SYNC_EFF DSMAPINPUT_APPLICANT	Applicant Entry

Message Name	Directory Entry
DSSTUDENT_SYNC DSSTUDENT_SYNC_EFF DSMAPINPUT_STUDENT	Student Entry
DSPERSON_SYNC DSPERSON_SYNC_EFF DSMAPINPUT_PERSON_SA	CS Person Entry

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

See *Enterprise PeopleTools PeopleBook: Supported Integration Technologies*

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with PeopleSoft Directory Interface for PeopleSoft HRMS"*

Message Publish

The following example is Publish PeopleCode that is used in a component's SavePostChange PeopleCode:

```
Local Message &MSG;
Local Rowset &COMPONENTROWSET;
&COMPONENTROWSET = GetLevel0();
&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);
&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);
&MSG.Publish();
```

Note. When publishing mapping data, use CopyRowsetDeltaOriginal, not CopyRowsetDelta.

Message Subscription for Hierarchical Maps

The following example shows subscription PeopleCode in a message when using hierarchical maps:

```
Declare Function ProcessMappingMessage PeopleCode FUNCLIB_EO_DS.DSMAPMESSAGE Field⇒
Formula;
Local Message &msgIn;
/* Build the Mapping messages from the input message */
&msgIn = GetMessage();
ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");
```

Message Subscription for Flat Maps

The following example shows subscription PeopleCode in a message when using flat maps:

```
Declare Function BuildMappingMessage PeopleCode FUNCLIB_EO_DS.DSMAPMESSAGE Field⇒
Formula;
Component string &DSMapname;
Local Message &DSMsg;
&DSMsg = GetMessage();
&MsgName = &DSMsg.Name;
 /* Create a SQL statement to retrieve the Names of all the Mappings that⇒
```

```
 reference this Message */
&MapSQL = CreateSQL("SELECT DSMAPNAME FROM PS_EO_DSMAP WHERE MSGNAME = :1 AND⇒
 STATUS = 'A' ", &MsgName);
While &MapSQL.Fetch(&DSMapname)
BuildMappingMessage(&DSMsg, &MsgName, True, &DSMapname);
End-While;
```

BuildMapping Message Syntax

The BuildMappingMessage function populates a message with data that is stored in another message and with data from the local database. After populating the message from the two data sources, it calls the mapping function. When all the data required for directory mapping does not exist in the original published message, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map name])
```

The function performs the following tasks:

- Copies data in the same record from the input message into the output message.
- Searches for empty records in the output message.
- Examines data in the message for key values for empty records.
- If it finds key values for empty records, populates empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name.

  Otherwise, it calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is in the FUNCLIB_EO_DS derived record, DSMAPMESSAGE field, Field Formula event.

Parameters

Name	Type	Description
input message	Message	Pass the message containing the originally published data.
output message	String	Specify the name of the message to be created, populated, and passed to the mapping function.

Name	Type	Description
online flag	Boolean	Set to *true* if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function. Set to *false* if the function is called through a background process, such as Directory Audit.
map name	String	Specify the name of the map to be used if the function does not call every map associated with the output message.

Here is an example:

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

Using Best Practices when Working with Maps

To avoid problems with directory maps, confirm the following information:

1. Confirm that the PeopleSoft Directory Interface product is selected on the Installation page: Set Up HRMS, Install, Installation Table, Products.
2. Confirm that the PeopleSoft database is properly connected to the directory: Enterprise Components, Directory Interface, Definitions, Directory Configurations, Test Connectivity.

   Both the Running Bind Test and Running Search Test fields should display *Success*.
3. Confirm that the schema extensions were loaded from the delivered DMS scripts (for CS and for HRMS, if needed): Enterprise Components, Directory Interface, Definitions, Directory Configurations, Schema Management.

   You should see rows in the Apply PeopleSoft Schema Extensions grid.
4. Confirm that you ran the Schema Cache process: Enterprise Components, Directory Interface, Definitions, Schema Caching.
5. Confirm that the Campus Solutions delivered messages are listed in Integration Broker transactions and are active: PeopleTools, Integration Broker, Node Definitions, Transaction.

   Make sure that these Campus Solutions messages are listed with their latest version activated:

   - DSADVSR_SYNC
   - DSADVSR_SYNC_EFF
   - DSAPPLICANT_SYNC
   - DSAPPLICANT_SYNC_EFF
   - DSDEPT_SYNC

- DSDEPT_SYNC_EFF
- DSPERSON_BASIC_SYNC
- DSPERSON_BASIC_SYNC_EFF
- DSSTUDENT_SYNC
- DSSTUDENT_SYNC_EFF

The messages should appear twice: once for Transaction Type = Inbound Asynchronous and once for Transaction Type = Outbound Asynchronous.

6. Confirm that these messages are also activated in Application Designer: Application Designer, File, Open, Message.

   Select the messages listed above, then right-click the version number. Select Message Properties, Use. The Status should be set to *Active*.

7. Confirm that the message subscriptions PeopleCode is active for all of the messages listed above: Application Designer, File, Open, Message.

   Select the messages listed above, then right-click the XxxxSyncEff message subscription. Select Message Subscription Properties, Use. The Status should be set to *Active*.

   Note. If you are using *flat* maps, the message subscriptions for messages that end with _EFF should have DSMappingSub activated and UsingDSMAPINPUTSub inactivated. If you are using *hierarchical* maps, the opposite should be true.

   ---

8. Confirm that the DIR_INTFC and DSCHNL channels are running: PeopleTools, Integration Broker, Monitor, Monitor Message, Channel Status.
9. Confirm that you can ping the node successfully: PeopleTools, Integration Broker, Monitor, Monitor Message, Note Status.
10. Confirm that the domain is active: PeopleTools, Integration Broker, Monitor, Monitor Message, Domain Status.
11. Confirm that you do not see errors in the PS_EO_DSBILOAD_ERR table when triggering a map.
12. If a map does not trigger the data to the directory, confirm that the messages were triggered: PeopleTools, Integration Broker, Monitor, Monitor Message: Overview and Message Instances tabs.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

CHAPTER 21

Working with Equation Engine

Equation Engine replaces the equation processor previously used in Campus Solutions applications. The Equation Engine is a powerful tool that enables you to develop a variety of formulas that can be used to identify a specific student population, establish the assignment of an award, provide a calculated value, or provide a customization point in a process.

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

- Prepare to write equations.
- Name equations.
- Use views and tables in equations.
- Define an equation.
- View equations as algebraic expressions.
- Round in Financial Aid packaging using equations.
- Review delivered equations.
- View sample equations.

Understanding Equations

An equation is a user-defined series of statements that can set criterion for setting a custom amount or a custom selection. For example, you can use equations to answer two types of questions:

1. Is the condition True or False? (This is called a selection equation and it provides a true or false answer.)
2. What is the amount? (This is called a calculation equation and it provides a numeric value.)

Equations can:

- Use algebraic statements.
- Follow Boolean conditional statements.
- Look up information in tables.
- Update information in tables.
- Branch or link to another equation.

Preparing to Write Equations

Before you write an equation, decide what information you want the equation to provide. You must know which fields exist in which tables in order to use an equation. For example, to determine if all new transfer students who are receiving an FFELP loan have completed the required interview, you must know that a field exists to track the completion of the interview and in which table it is stored.

If you want the equation to select a population of students for a process, define the criteria exactly as well as the steps to make in selecting those students. If you want the equation to provide you with a calculated value such as an award maximum, determine where the value comes from and how it is calculated.

These elements are necessary to write an equation:

1. A table or view must exist in order to be named in an equation.
2. You must have security access to the table or view.
3. Table security must be turned on for you to access the table or view.
4. Any table or view that you access must not have a long VAR_CHAR field in it.

Using Equation Keywords

You must write equations using keywords and operands. A keyword is an instruction for the equation to perform. Equation keywords include:

IF Indicates a conditional statement that must be followed by a THEN keyword and may contain an ELSE or an ELSE IF keyword. It must be terminated by the keyword END IF. It compares one operand against another operand.

FIND FIRST Finds the first row in the specified table using the specified key values with relational operators (“Equal” or “Greater-or-Equal”) comparing these to either local or global variables. FIND NEXT does not have any key value parameters, but it finds the next row relating to the previously issued FIND FIRST. If a FIND is successful, then references to the table and fields for that FIND are valid and return the corresponding field values.

FIND NEXT Points to the next occurrence of the row of fields in a FIND table You can set up the equation so that failure to find an occurrence can be handled, for example by the equation returning to the calling equation or program.

ASSIGN Assigns a value to a global or local variable in an equation.

CALL Calls a sub-equation or an external routine or an SQL statement. When you CALL something, control returns to the statement after the CALL when the called item finishes. For a sub-equation, control might not return if that sub-equation issues a HALT statement. Calls to sub-equations pass parameters through local and global variables and pass values back through global variables. An equation can call itself. Calls to external routines pass parameters back and forth via global variables. Calls to SQL pass parameters back and forth as well and can be used to get an array of data or update relational tables.

LOOP Causes the equation to repeat the statements between the LOOP and the END LOOP statement in a loop until an EXIT LOOP statement is encountered within that loop, usually within an IF statement.

MESSAGE Writes a message to the log.

TRACE	Writes debugging statements to the log and is used for problem resolution.

Note. Additional equation keywords are described in the *PeopleSoft Equation Engine Programmer's Guide*.

Using Operand Types

Equations employ operand types that identify the type of information contained in the operand that follows it. Type choices differ depending on where the operand type is located in the equation. Options include:

Table	Table or view name.
Value	Valid values for a field.
SQL	This operand only applies to the CALL statement.
Global	User-defined global variable.
Local	User-defined local variable.

Note. Operand types are described in detail in the *PeopleSoft Equation Engine Programmer's Guide*.

Using Operators

Equations use operands and operators. Operands are based on the previous type. Operators are entered in the keyword column and can be:

Arithmetic	(+, —, *, /) Add, Minus or Subtract, Multiply, Divide Arithmetic operators apply to two expressions and provide an arithmetic result. You can use parentheses to group expressions or to make the equation more readable.
Boolean	(AND, OR, NOT) These are logical operators. You use them within an IF statement. AND is used between two conditions. It indicates that both statements must be met for the selection to be made. For example, A and B must be true for a selection. OR is used between two conditions. It indicates that only one of the statements must be met for selection to be made. For example, A OR B can be true for a selection. NOT is used in conjunction with a condition to show that the condition does not exist. For example, NOT <condition>.
Relational	(=, <, <=, >, >=, < >) Equal, Less than, Less than or equal, Greater than, Greater than or equal, Less than or Greater than (for example, not equal). Relational operators compare two expressions and provide a truth value. You can use parentheses to group expressions or to enhance readability.

Note. Operands and operators are described in detail in the *PeopleSoft Equation Engine Programmer's Guide*.

Using Variables

There are two types of variables available in the equation engine — local and global. The data is passed to the equation engine using the global variable array in a process instance of a copy of the global variables that is defined by the Equation Test Data page or by a calling program. Global variables are visible and are referenced by an equation running or called. Local variables are only visible to the currently running equation, but copies of local variables can be passed to called sub-equations as parameters.

Note. Variables are described in detail in the *PeopleSoft Financial Aid Equation Engine Programmer's Guide*.

Naming Equations

When you write a new equation you must give it a name that follows strict naming guidelines. Your IT department will help you establish rules for equations within the institution. Do not use a naming convention that begins with the letters of a PeopleSoft product name or sub-product name. For example, do not use AA (academic advisement), AD (admissions), CC (campus community), CS (campus solutions), FA (financial aid), HR (human resources), SF (student financials), or SR (student records). Each department in the institution should have its own equation name prefix as well to avoid naming conflicts.

Note. You must not modify any system-specific equations as compromising those equations will cause negative processing ramifications for the specific feature.

See Also

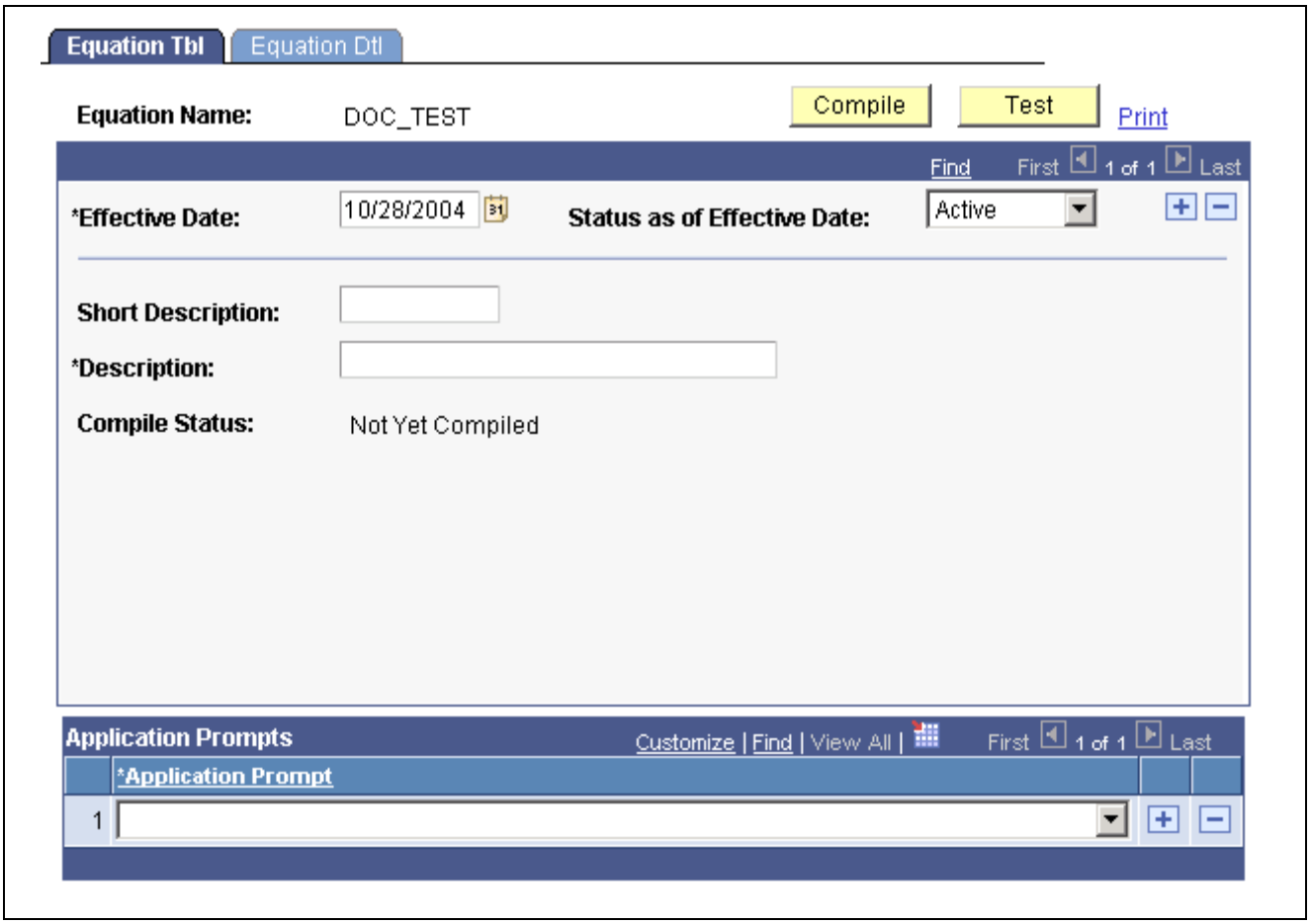
Chapter 21, "Working with Equation Engine," Reviewing Delivered Equations, page 342

Page Used to Name an Equation

Page Name	Object Name	Navigation	Usage
Equation Tbl (equation table)	EQUATION_TBL	Set Up SACR, Common Definitions, Equation Engine, Add a New Value	Create an equation name based on established naming conventions for your organization.

Naming an Equation

Access the Equation Tbl page.



Equation Tbl page

Using Views and Tables in Equations

A view consists of information drawn from a table or multiple tables and can be accessed by an equation. Use a view whenever it can make the equation logic simpler. You should only use a view to access information contained in core tables.

Note. If you need to access information contained in a core table or a very large table, ask your organization's IT department to create a view of that table and add the view to the Equation Table Authorization Security Tree.

Defining an Equation

This section lists prerequisites and discusses how to:

- Define application prompts.
- Define or view equation details.

Prerequisite

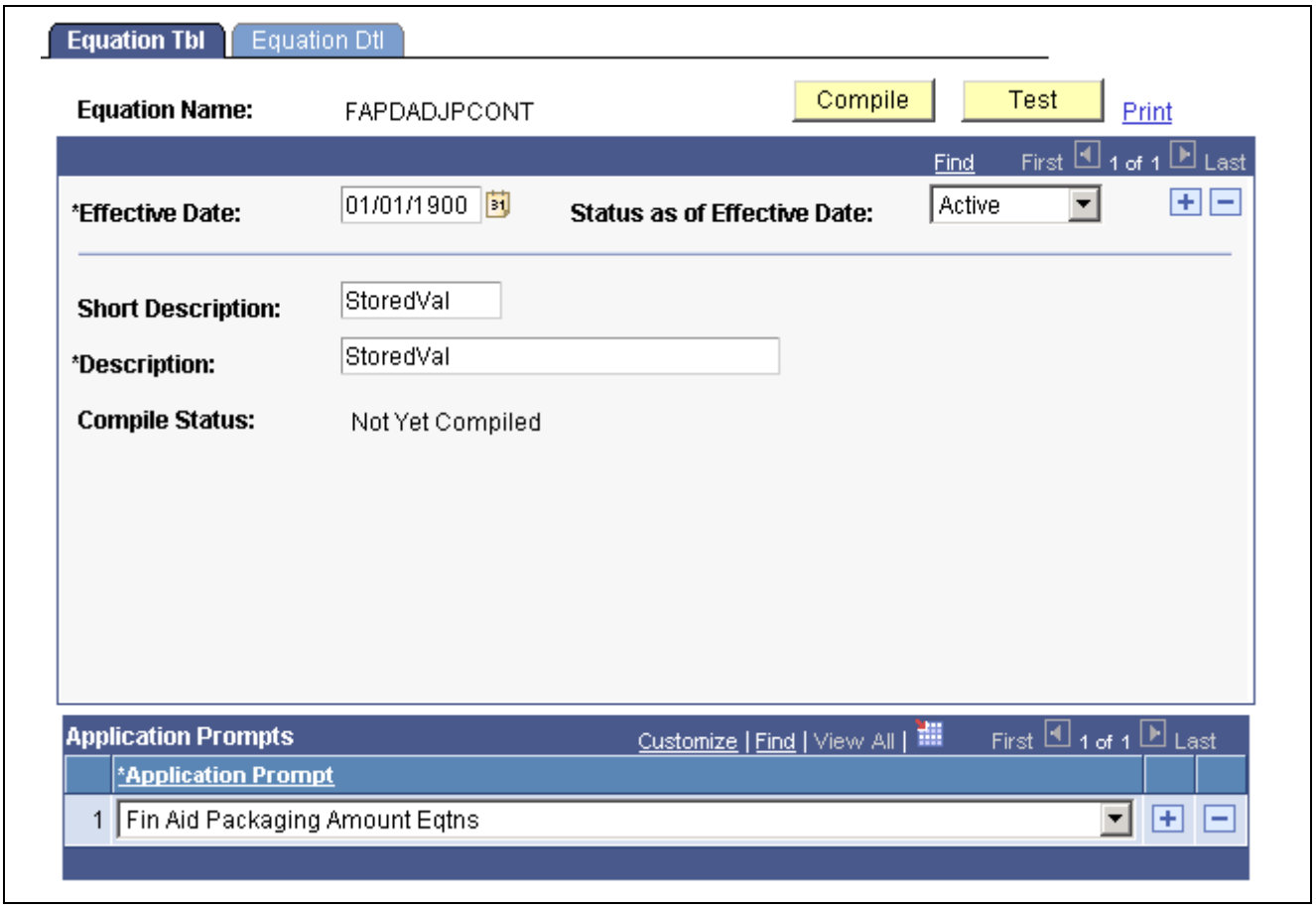
Before you define an equation on the Equation Detail page, you should devise a flow chart that takes into consideration what your end result should be. Using a flow chart will help you develop proper equation syntax.

Pages Used to Define an Equation

Page Name	Object Name	Navigation	Usage
Equation Tbl	EQUATION_TBL	Set Up SACR, Common Definitions, Equation Engine, Equation Engine	Create a short and long description for an equation and determine the application prompt.
Equation Dtl (equation detail),	EQUATION_DTL	• Set Up SACR, Common Definitions, Equation Engine, Equation Engine • Set Up SACR, Common Definitions, Equation Engine, Review Equations • Click Equation Detail on the Related Item Type Group page, Packaging Plan page, FM Target page, IM Target page, Equity Rule page, Packaging Limits page, or the Packaging Rules 1 page to review an equation in read-only mode.	Define equations or view an equation written as an algebraic expression. Only select fields are available for use.

Defining Application Prompts

Access the Equation Tbl page.



Equation Tbl page

If you are working on a particular feature, such as a packaging plan, and need to create one or more equations for that plan, you must define those equations here. On the Equation Tbl page, write a short description and long description for the new equation.

You must then associate that equation with an application prompt. For example, the equation you are creating is a packaging selection equation. Because this equation will be used to access a population of students, a selection equation, you must assign the Fin Aid Packaging Select Eqtn application prompt to the equation. You do that by selecting Fin Aid Packaging Select Eqtn from the drop down list. By associating the application prompt value with an equation here, this equation will appear in the list of available selection equations that you can use when creating your packaging plan in the Packaging Plan Set Up table.

As another example, if you are working on a Student Financials tuition calculation feature, and you want to create an equation that will return an amount, you must associate your new equation with an application prompt. You would select Stdnt Fin Tuition Amount Eqtns. After selecting the Stdnt Fin Tuition Amount Eqtns application prompt here, your new equation will appear on the list of possible equations to use when working with the tuition calculation set up feature.

Effective Date Enter a date after which the equation will be effective.

Status as of Effective Date Select either *Active* or *Inactive*.

Short Description Write a short description for the equation based on the equation naming guidelines.

Description Write a description for this equation.

Application Prompt Select an application prompt value. These prompt values control which equations will be available for you to choose from when defining equations for a particular feature. If you do not select an application prompt value for an equation here, that equation will not appear on the list of available equations for selection during feature processing.

Prompt values include:

Fin Aid Loan Edits for CL4

Fin Aid Loan Edits for CRC

Fin Aid Packaging Amount Eqtns

Fin Aid Packaging Select Eqtns

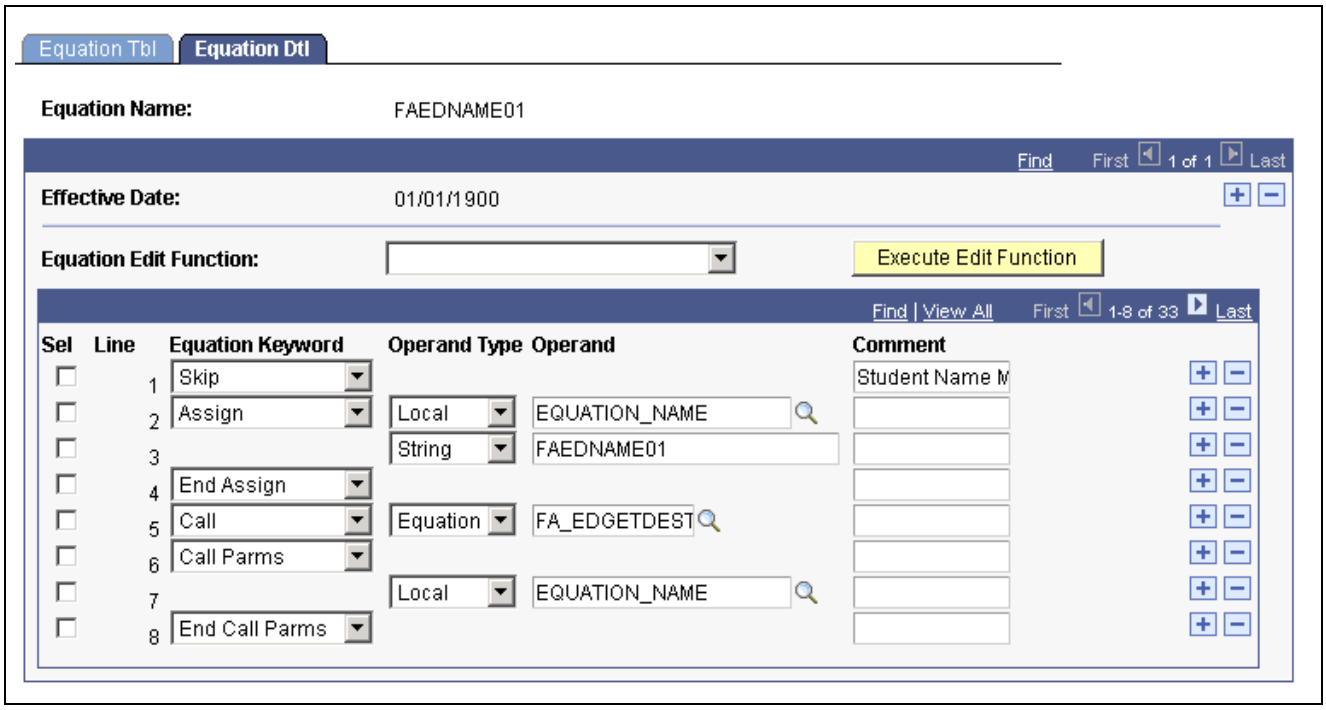
Stdnt Fin Tuition Amount Equtns

Stdnt Fin Tuition Selct Eqtns

Warning! Do not make any changes to the Application Prompt values.

Defining or Viewing Equation Details

Access the Equation Dtl page.



Equation Dtl page

Keyword Enter equation keywords necessary for your equation.

Operand Type Enter an operand type from the available options. Identifies the type of information contained in the operand that follows.

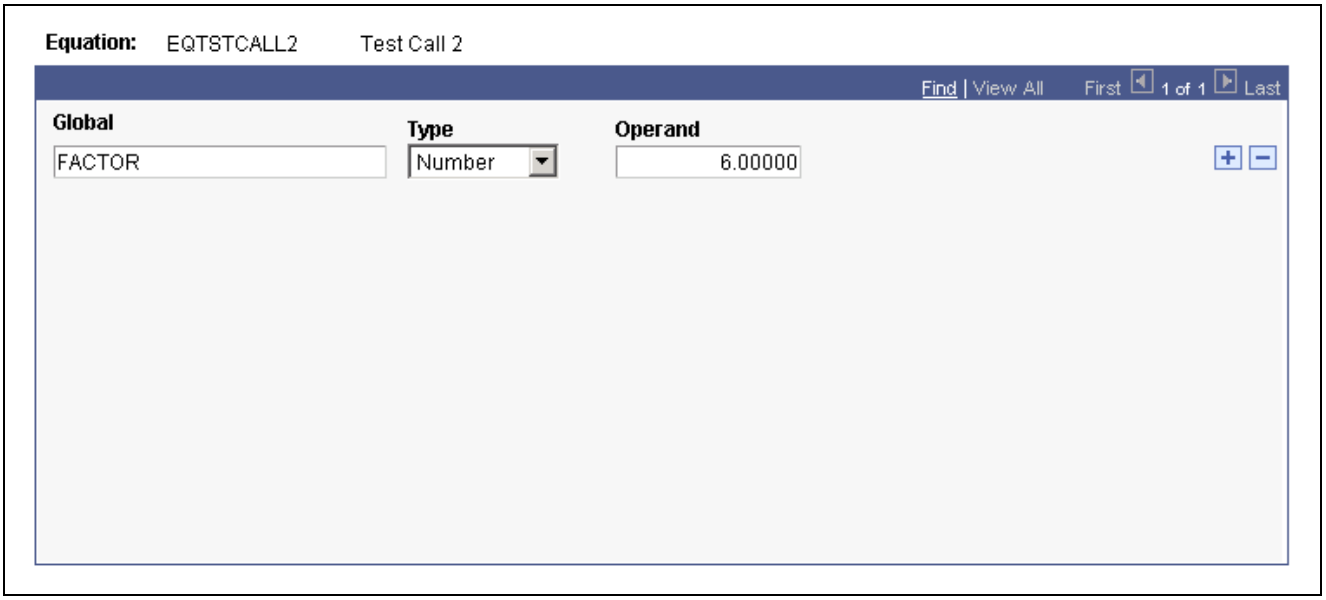
Operand The operand is based on the operand type selected in the previous field.

Comment	This is not part of the equation. You can create a short comment here.
Execute Edit Function	Click to have the system edit the equation you have written.

Testing Equations

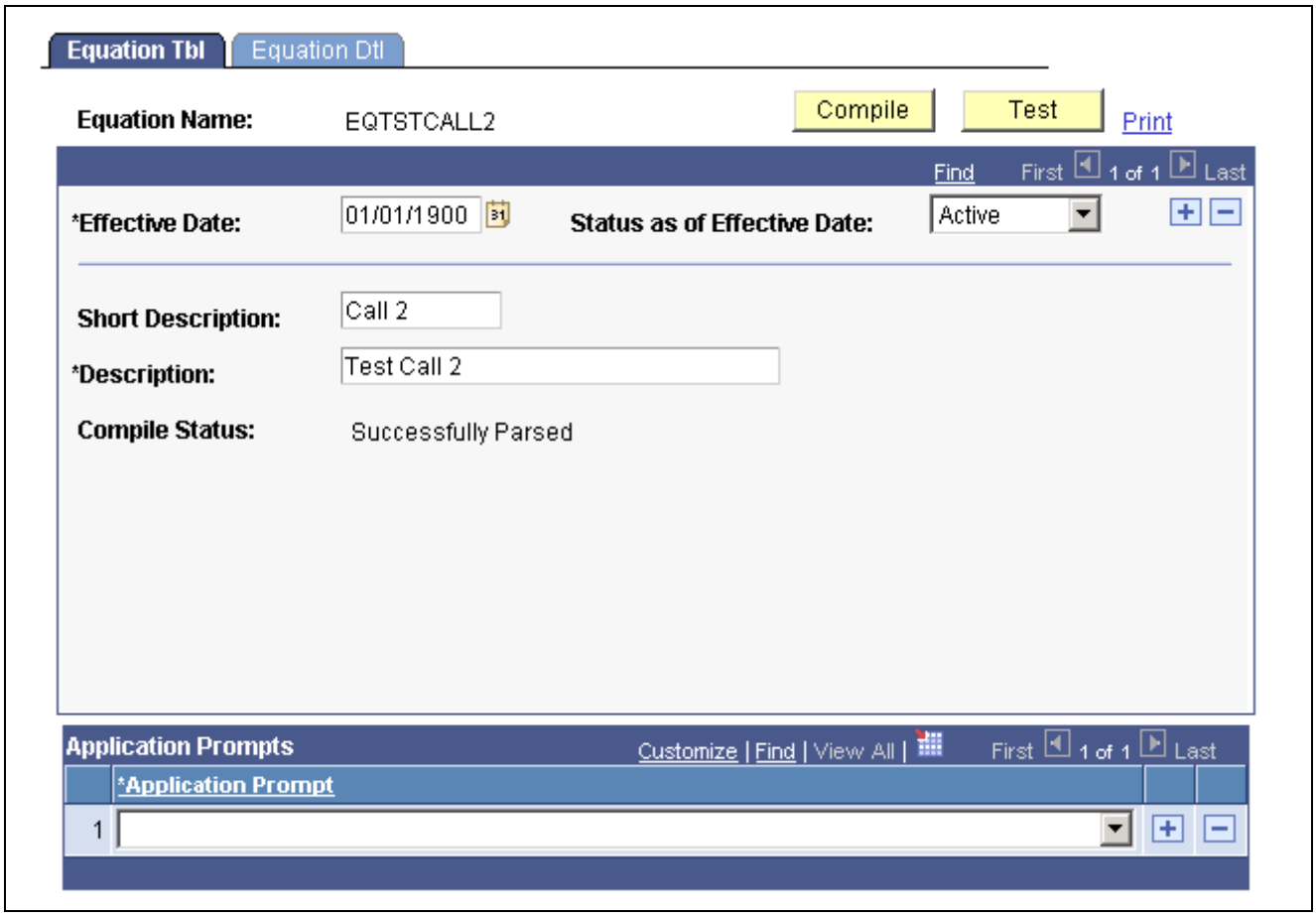
To test the equation, you may or may not need to set up test data. In an equation whose sole function is to add a few numbers together, no test data is needed because all the data elements are provided. However, to test an equation that references keys in the table or passes global variables, the equation must have test data present.

To define and enter test data, access the Equation Test Data page and define the name of the variable, type, and operand (Set Up SACR, Common Definitions, Equation Engine, Equation Test Data and Set Up SACR, Common Definitions, Equation Engine, Equation Test Data).



Equation Test Data page (EQTN_TEST_DATA)

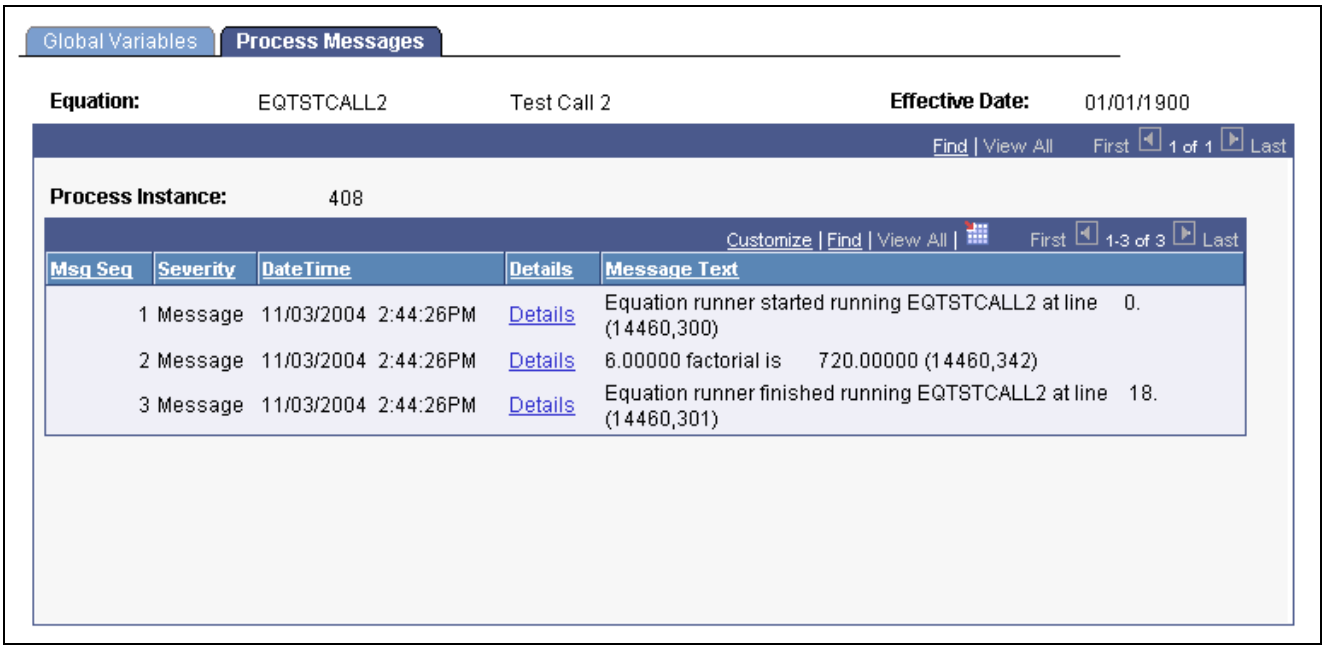
After you have defined all the necessary variables and entered data on the Equation Test Data page, return to the equation engine's main page—Equation Tbl—and click the Test button.



Equation Tbl page (EQUATION_TBL)

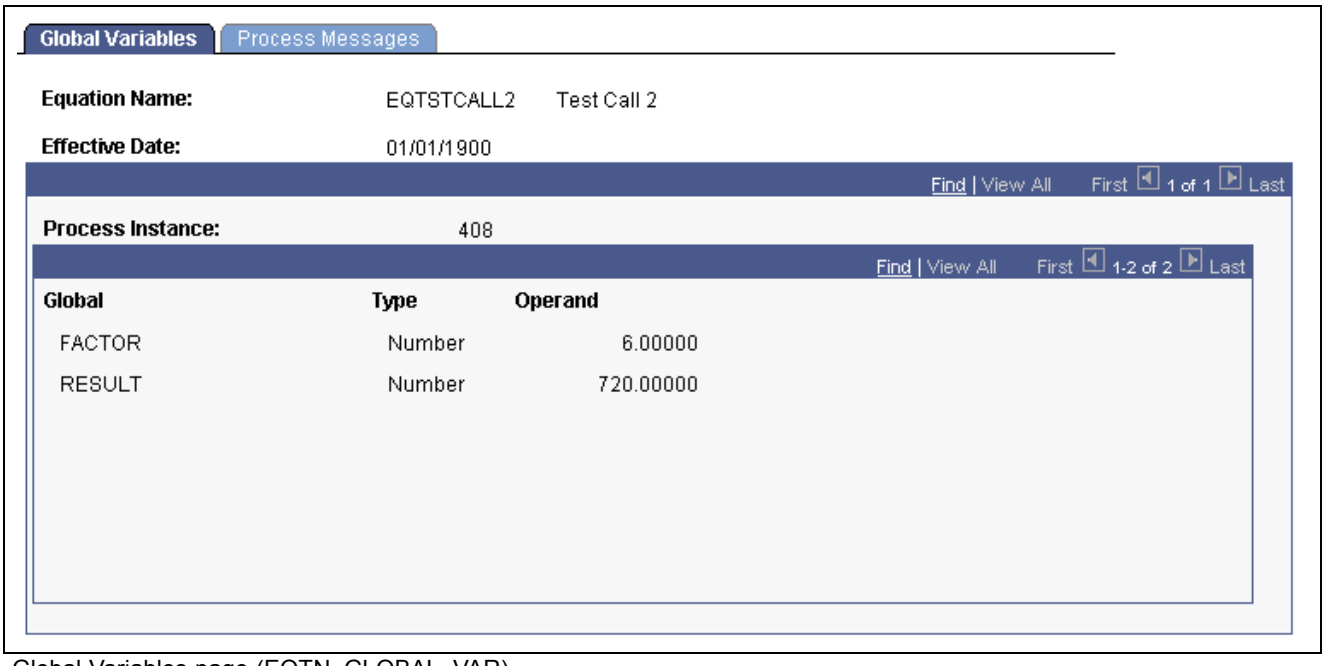
When you click the Test button, the system displays the Equation Test Results — Process Messages page. The page displays the messages associated with the equation test run. Note that this process can also be run as a batch process rather than being initiated by the TEST button. In order to test the equation in batch, choose the Run Equation option (Set Up SACR, Common Definitions, Equation Engine, Run Equation).

You can also print the Equation that has been established in batch by choosing the Print Equation option (Set Up SACR, Common Definitions, Equation Engine, Print Equation) or by clicking the print link on the Equation Table page.



Process Messages page (EQTN_PRCS_MSGS)

The Global Variable page displays the global variables used within the current equation run.

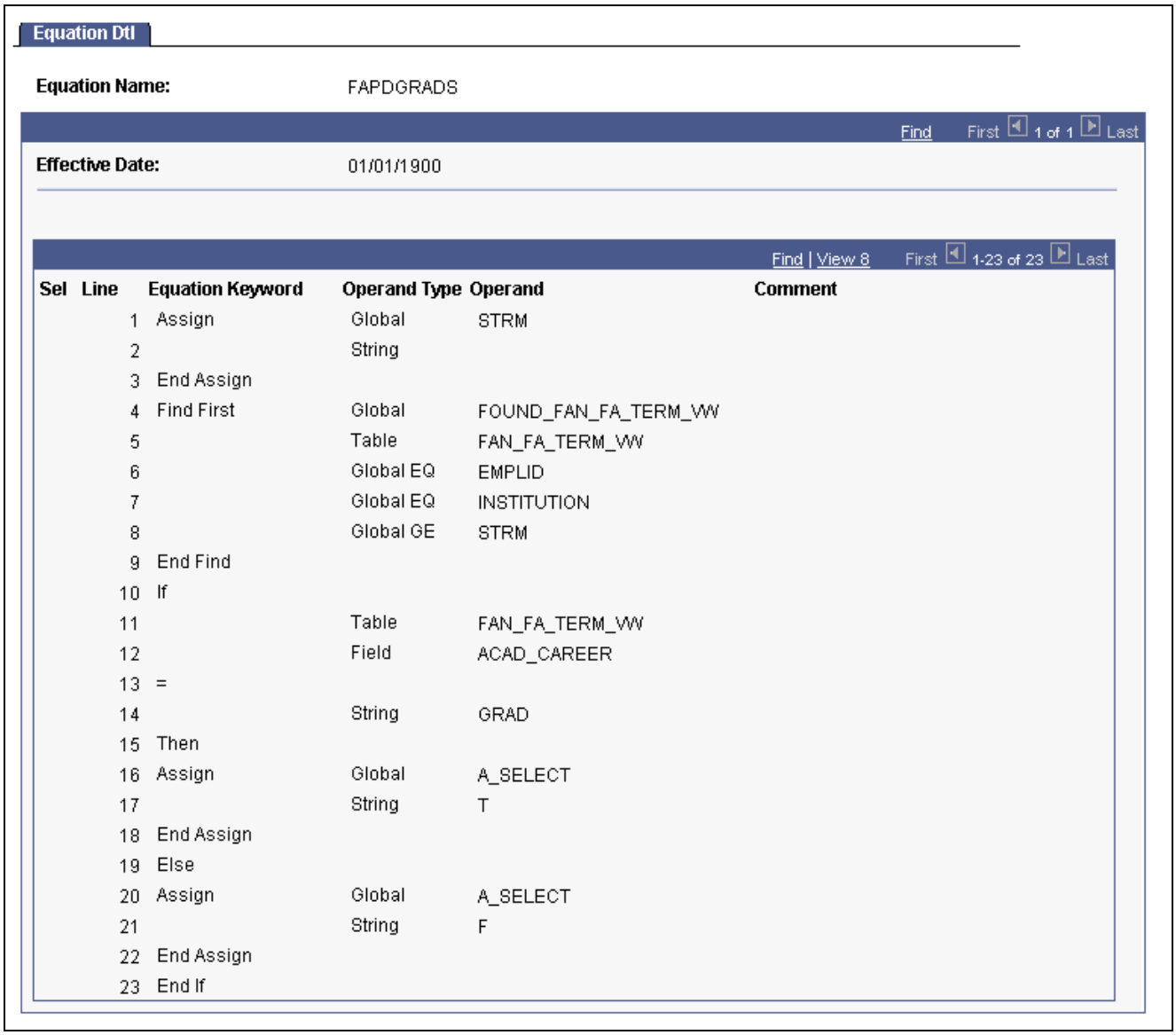


Global Variables page (EQTN_GLOBAL_VAR)

Viewing Equations as Algebraic Expressions

You can view any equation that you are authorized to read on the Review Equations component (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

Access the Equation Dtl page.



Equation Dtl page (FAPDGRADS)

The page displays the equation name and an approximate algebraic representation of the equation. You cannot edit the equation in this page. Use the scroll bar to view the entire equation.

Note. This summary is a representation of the equation you created on the Equation Detail page. The Equation Detail page determines how your equation functions.

Rounding in Financial Aid Packaging Using Equations

The Packaging routine does not round up to whole dollar amounts when your equation yields a decimal result for a packaging limit. If the result contains decimals, the Packaging routine produces the following error message: “Message # 9146 Cannot disburse in whole dollars; award contains cents.”

For those equations that need to yield a whole dollar result, you must use a rounding equation. You could accomplish this by employing one of two options:

1. Option 1

a. Create your A_AMOUNT equation, and at the bottom of the equation insert a Call statement to the delivered sample equation FAPDROUNDAWD.

b. Review the FAPDROUNDAWD equation to determine the number of places beyond the decimal point that you want (0=integers or whole numbers, 1, 2, etc.).

c. Ensure that the Equation EQROUND is called as part of FAPDROUNDAWD.

2. Option 2

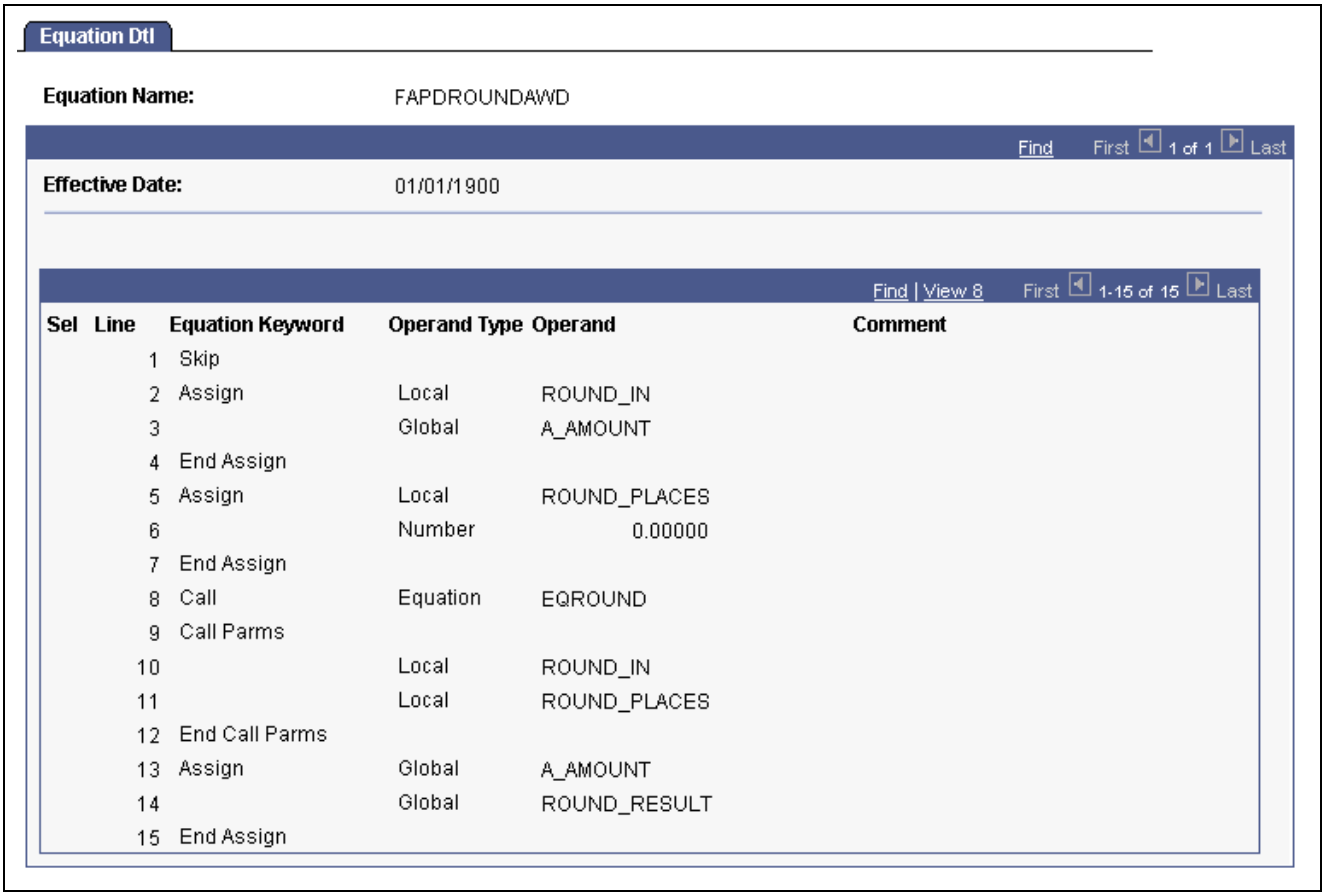
a. Create your A_AMOUNT equation, and at the bottom of the equation, append the contents of the delivered sample equation FAPDROUNDAWD to your newly created equation – making sure that you Assign ROUND_IN, ROUND_PLACES (including the number of places beyond the decimal point that you want A_AMOUNT to contain).

b. Ensure that the Packaging System Equation EQROUND is called as part of your newly created equation.

c. Assign A_AMOUNT the value from ROUND_RESULT.

Important! In order for this rounding logic to work properly, it is imperative that: all elements of FAPDROUNDAWD are employed, and EQROUND is called as part of that routine. Do not modify these components.

Here are two of the rounding equations that PeopleSoft delivers:



Equation Dtl

Equation Name: FAPDROUNDAWD

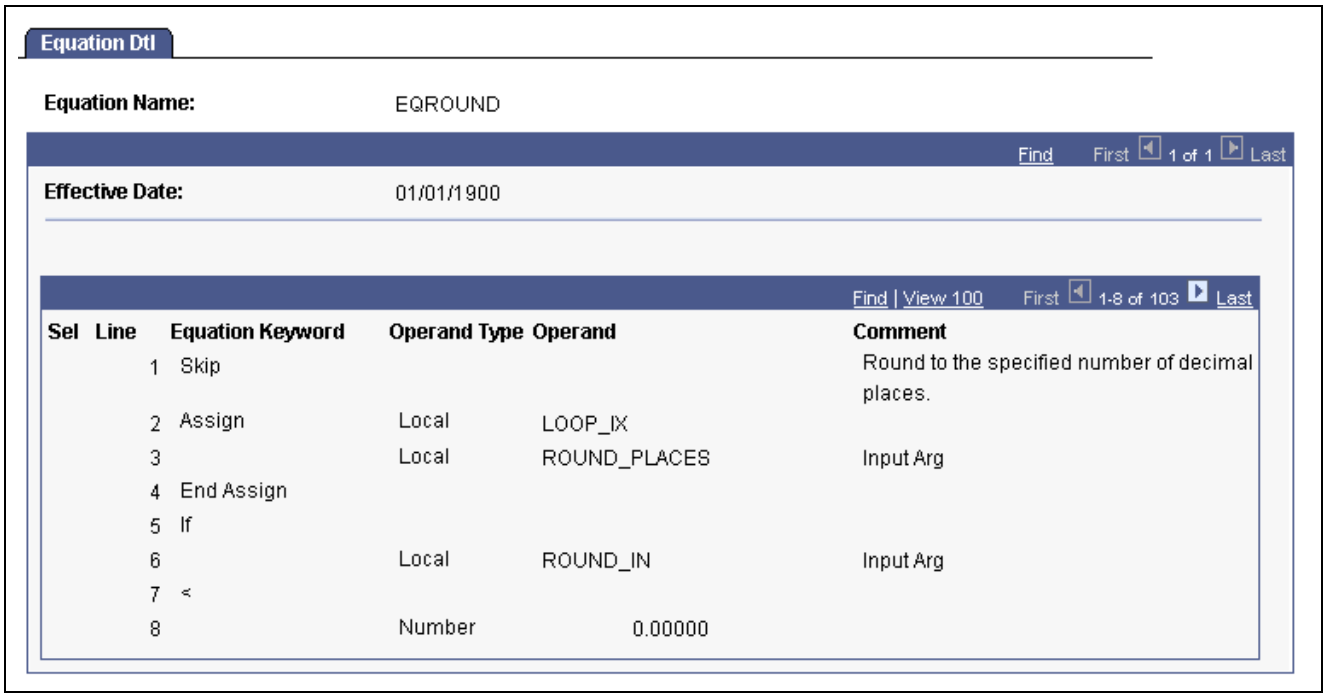
Find First 1 of 1 Last

Effective Date: 01/01/1900

Find | View 8 First 1-15 of 15 Last

Sel	Line	Equation Keyword	Operand Type	Operand	Comment
	1	Skip			
	2	Assign	Local	ROUND_IN	
	3		Global	A_AMOUNT	
	4	End Assign			
	5	Assign	Local	ROUND_PLACES	
	6		Number	0.00000	
	7	End Assign			
	8	Call	Equation	EQROUND	
	9	Call Parms			
	10		Local	ROUND_IN	
	11		Local	ROUND_PLACES	
	12	End Call Parms			
	13	Assign	Global	A_AMOUNT	
	14		Global	ROUND_RESULT	
	15	End Assign			

Delivered rounding equation FAPDROUNDAWD



Delivered rounding equation EQROUND

See Also

PeopleSoft Enterprise Financial Aid 8.9 PeopleBook, "Setting Up Auto Packaging and Mass Packaging"

Reviewing Delivered Equations

PeopleSoft delivers a set of feature-specific equations as part of Equation Engine. These represent either system-specific or demonstration-based equations.

Warning! Do not modify any system-specific equations, as compromising those equations will cause negative processing ramifications for the specific feature.

You can view any equation that you are authorized to read on the Review Equations component. (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

EQ*— Delivered System and Demo Equations

Equation Name	Description
EQCOMPILEALL	Compile All Active Equations
EQFACTORIAL	Factorial Sub Equation
EQROUND	Round to spec decimal places
EQROUNDBANK	Banker's Rounding
EQTNRUNCTL	Default Equation Run Control

Equation Name	Description
EQTSTADD1	Test Add 1
EQTSTASGN1	Test Assignment Statement
EQTSTASSIGN2	Test Assign 2
EQTSTCALL1	Test Call 1
EQTSTCALL2	Test Call 2
EQTSTCALL3	Test Call 3
EQTSTCALL4	Test Call 4
EQTSTCALL5	Test Call 5
EQTSTCALL6	Test Call 6 - sql multi select
EQTSTCALL7	Test Call 7 - sql sel count
EQTSTCALL8	Call Test 8
EQTSTDDF	Test Date Difference
EQTSTDIV1	TEST DIVIDE 1
EQTSTEXIST1	Test Exist 1
EQTSTEXIST2	Test Exit 2
EQTSTEXIST3	Test Exit 3
EQTSTEXT1	Test External 1
EQTSTEXT2	Test External 2
EQTSTFIND1	Test Find 1
EQTSTFIND2	Test Find 2
EQTSTFIND3	Test Find 3
EQTSTFIND4	Test Find 4
EQTSTFIND5	Test Find 5
EQTSTFIND6	Find 6
EQTSTHALT1	Halt Test 1
EQTSTIF1	Test If 1
EQTSTIF2	Test If 2

Equation Name	Description
EQTSTIF3	If Test 3
EQTSTIF4	If Test 4
EQTSTLOOP1	Test Loop 1
EQTSTMSG1	Test Msg 1
EQTSTMSG2	Test Msg 2
EQTSTMSG3	Test Msg 3
EQTSTMSG4	Test Msg 4
EQTSTMSG5	Test Msg 5
EQTSTMSG6	Test Msg 6
EQTSTMSG7	Test Msg 7
EQTSTMULT1	Test Multiply 1
EQTSTPAREN1	Test Paren 1
EQTSTPRECED1	Test Operator Precedence 1
EQTSTRETN1	Test Return 1
EQTSTRETN2	Return Test 2
EQTSTROUND1	Test Rounding 1
EQTSTSTEM1	Test Stem 1
EQTSTSTEM2	Test Stem 2
EQTSTSTEM3	Test Stem 3
EQTSTSTEM4	Test Stem 4
EQTSTSUB1	Test Subtract 1

FACE*— CommonLine Delivered Edits

Equation Name	Description
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category

Equation Name	Description
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status

FACL* — CommonLine Delivered Edits

Equation Name	Description
FACLOANEDITS	Fin Aid Loan Edits
FACLOANONEUP	One Up CRC Loan Validation

FACR* — Common Record CommonLine Delivered Edits

Equation Name	Description
FACRADDR01	Permanent address missing
FACRADDR02	Mailing address missing
FACRADDR03	Borrower perm address missing
FACRADDR04	Borrower mailing addr missing
FACRBORROW01	Borrower missing
FACRCHNG01	Loan incr w/undisbursed check
FACRCOSIGN01	Cosigners Required
FACRCOSIGN02	Cosigner Signatures Required
FACRDEBT01	Total Loan Debt Missing
FACRDEPSTAT1	Dependency stat missing
FACRDEST01	Loan Dest Nbr is Zero
FACRDISBDT01	Disb 91 days after Ln Per End
FACRDISBDT02	Ln Per Strt - Disb Dt > 13
FACRDISBDT03	Disb dts require chron order

Equation Name	Description
FACRDRVLIC01	Borrower DL or state missing
FACRGRADDT01	Grad dt before Loan End dt
FACRHOLDFED1	Disbursement Hold on Fed Aid
FACRNAME01	Student name missing
FACRNAME02	Borrower name missing
FACRPER01	Loan Per gt 1 Yr
FACRPLUS01 PLUS borr/stdnt SSN	same
FACRPLUS02	No PLUS for grad student
FACRPLUSMPN	Serial PLUS MPN Check
FACRREFS01	References Required
FACRSRVCIN01	Service Indicators Exist
FACRSSN01	Borrower SSN is blank
FACRSSN02	Student SSN is blank

FAED* — CommonLine 4 Delivered Edits

Equation Name	Description
FAEDADDR01	Permanent address missing
FAEDADDR02	Mailing address missing
FAEDADDR03	Borrower perm address missing
FAEDADDR04	Borrower mailing addr missing
FAEDBORROW01	Borrower missing
FAEDCHNG01	Loan incr w/undisbursed check
FAEDCOSIGN01	Cosigners Required
FAEDCOSIGN02	Cosigner Signatures Required
FAEDDEBT01	Total Loan Debt Missing
FAEDDEPSTAT1	Dependency stat missing
FAEDDEST01	Loan Dest Nbr is Zero

Equation Name	Description
FAEDDISBDT01 Disb	91 days after Ln Per End
FAEDDISBDT02	Ln Per Strt - Disb Dt > 13
FAEDDISBDT03	Disb dts require chron order
FAEDDRVLIC01	Borrower DL or state missing
FAEDGRADDT01	Grad dt before Loan End dt
FAEDNAME01	Student name missing
FAEDNAME02	Borrower name missing
FAEDPER01	Loan Per gt 1 Yr
FAEDPLUS01	PLUS borr/stdnt SSN same
FAEDPLUS02	No PLUS for grad student
FAEDPLUSMPN	Serial PLUS MPN Check
FAEDREFS01	References Required
FAEDSRVCIN01	Service Indicators Exist
FAEDSSN01	Borrower SSN is blank
FAEDSSN02	Student SSN is blank

FAHD* — Hold and Release Delivered Edits

Equation Name	Description
FAHDLOADLVL	Load Level Status Check
FAHDSAPSTAT	Satisfactory Academic Progress

FALTR*— Forms Engine FAN Delivered Equations

Equation Name	Description
FANLTRDTRANG	Award Ltrs within a date range
FANLTRNONEED	No Need
FANLTRSCHONL	Scholarship Only
FANLTRSEL	Award Ltr Selection Criteria

FA_CRC* — CRC Loan Edits Delivered Edits

Equation Name	Description
FA_CRCEDITS	FA CRC Loan Edits

FA_* — CommonLine Delivered Edits

Equation Name	Description
FACEDDELERRS	Delete Old Loan Edit Errors
FACEDGET1ST	Get First Run Control Info
FACEDGETCATG	Get Dest Category
FACEDGETCLPN	Get CL Pnote
FACEDGETDEST	Get Loan Dest Edit Data
FACEDGETORIG	Get Loan Origination Data
FACEDGETTYPE	Get Loan Type Data
FACEDLOGERR	Log Loan Edit Errors
FACEDUPDSTAT	Update Loan Action Status
FA_LOANEDITS	Fin Aid Loan Edits

FAPK* — Packaging System Equations

Equation Name	Description
FAPKAFDCPAR	Set global AFDC_PAR
FAPKAFDCSTU	Set glob AFDC_STU
FAPKAGIPAR	Set global AGI_PAR
FAPKAGISTU	Set global AGI_STU
FAPKCHLSPPAR	Set global CHILD_SUPPORT_PAR
FAPKDEPENDST	Set global DEPNDNCY_STAT
FAPKDEPNDNTS	Set global DEPENDENTS
FAPKDTAPPREC	Set global DT_APP_RECEIVED
FAPKERNINPAR	Set global ERND_INC_CRED_PAR
FAPKEXEMPT	Set global NUM_EXEMPTIONS

Equation Name	Description
FAPKEXEMPTPR	Set global NUM_EXEMPTIONS_PAR
FAPKGDATASRC	Get Packaging Data Source
FAPKLEGALRES	Set global LEGAL_RESIDENCE
FAPKMARSTPAR	Set global MARITAL_STAT_PAR
FAPKMAR_STAT	Set global MARITAL_STAT
FAPKMONVETBN	Set global MONTHLY_VET_BEN
FAPKNMFAMMEM	Set global NUM_FAMILY_MEMBERS
FAPKNMINCOLL	Set global NUMBER_IN_COLLEGE
FAPKNMMNVTBN	Set global NUM_MONTH_VET_BEN
FAPKNUMINCOL	Set global NUM_IN_COLLEGE
FAPKNUMINFAM	Set global NUMBER_IN_FAMILY
FAPKORPHAN	Set global ORPHAN
FAPKRDINSTCT	Read INST_CONTROL
FAPKRDINSTIN	Read INST_INTERPRET
FAPKRDINSTPR	Read Inst Parent
FAPKRDINSTST	Read Inst Student
FAPKRDISIRCT	Read ISIR_CONTROL
FAPKRDISIRPR	Read Isir Parent
FAPKRDISIRST	Read Isir Student
FAPKSPERNINC	Set global SPS_EARNED_INCOME
FAPKSSBENPAR	Set global SS_BENEFIT_PAR
FAPKSSBENSTU	Set global SS_BENEFIT_STU
FAPKSTATERES	Get State Residence
FAPKSTERNINC	Set global STD_EARNED_INCOME
FAPKTOTWKAP	Set global TOTAL_FROM_WKA_P
FAPKUNTAXIN	Set global UNTAXED_INC

Equation Name	Description
FAPKUNTAXINP	Set global UNTAXED_INC_PAR
FAPKVETERAN	Set global VETERAN

FAPD* — Packaging Demo Equations

PeopleSoft strongly recommends that you do not modify these equations. You can clone them to use a basis for your own similar equations.

Equation Name	Description
FAPDADJPCONT	Stored Value ADJ_PAR_CONTRIB
FAPDANNLOAD	Annual Load 1
FAPDANNLOAD2	Annual_Load 2
FAPDANNLOAD3	Annual Load 3
FAPDAPP_DATE	If Then Example DT_APP_RECEIVED
FAPDCLCIFAGI	Calc Variables based on AGI
FAPDCLCTLEFC	Calculate Award based on EFC
FAPDDEPENDNT	Dependent Students
FAPDDEPNDNTS	Dependents
FAPDDL_STATE	Award based on License State
FAPDDOBPRIOR	If Then Example of DOB_PRIOR
FAPDEARLYADM	If Then Else Example EARLY_ADM
FAPDEFC3000	Award based on FED_EFC <= 3000
FAPDEFC4000	Award based on FED_EFC <= 4000
FAPDEFC6000	Award based on FED_EFC > 6000
FAPDEFCBOTH	Handles Both Award Periods
FAPDEFC_STAT	If Then Example of EFC STAT
FAPDFROSH	Award based on Freshman level
FAPDGAPBDGT1	Gap_Bdgt#1
FAPDGAPBDGT2	Gap_Bdgt#2
FAPDGRADELVL	Award based on NSLDS_LOAN_YEAR

Equation Name	Description
FAPDGRADS	GRADUATES
FAPDHIGHEFC	Award where FED_EFC >= 10,000
FAPDINDPNDNT	Independent
FAPDJMET5000	Select if Unmet Need >= 5,000
FAPDLASTAWRD	Last Award
FAPDMDLABRAT	Award based on VARIABLE_FLAG7
FAPDMDSPCLTY	Award based on VARIABLE_CHAR3
FAPDMDTSTSCR	Award using VARIABLE_NUM5
FAPDPELLELIG	Select Pell Eligible Candidate
FAPDPELL_ELG	Pell Eligibility Flag Example
FAPDPLUS_INT	Example: Interest in PLUS Loan
FAPDPRIM_EFC	Stored Val Example Primary EFC
FAPDPRJYRINC	If Then Example on PROJ_YR_INC
FAPDP_AFDC	Stored Value of Parents' AFDC
FAPDP_AGI	Stored Value of PAR_AGI
FAPDP_IM#COL	Inst Parent Number in College
FAPDP_IM_AGI	Inst Parent Number in College
FAPDP_MARSTT	If Then using MARITAL_STAT_PAR
FAPDP_NMCOLL	If Then: PAR NUM_IN_COLLEGE
FAPDP_WORK1	Parent 2005 ISIR WORKSHEET_A
FAPDP_WORK2	Parent 2005 ISIR WORKSHEET_B
FAPDP_WORK3	Parent 2005 ISIR WORKSHEET_C
FAPDREMNEED1	Remaining Need 1
FAPDREMNEED2	Remaining Need 2
FAPDREMNEED3	Remaining Need 3
FAPDROUNDAWD	Round A_AMOUNT
FAPDRUNGAWDS	Running TOTAL AWD AMT

Equation Name	Description
FAPDSEC_EFC	Stored Value of SECONDARY_EFC
FAPDSPS_ERND	Stored Value of SPS_EARNED_INC
FAPDSSA_CITZ	If Then: SSA_CITIZENSHP_IND
FAPDS_AFDC	Stored Value: AFDC_STU
FAPDS_AGI	Stored Value: AGI_STU
FAPDS_CHLSUP	Store Value CHILD_SUPPORT_RCVD
FAPDS_DEP_ST	If Then Example DEPNDNCY_STAT
FAPDS_EARNED	Stored Val: STD_EARNED_INCOME
FAPDS_IM_AGI	Award using IM Student AGI
FAPDS_IM_INC	Inst Student Income
FAPDS_MARRD	If Then Example of STU MARRIED
FAPDS_MAR_ST	If Then Example MARITAL_STAT
FAPDS_NUMCOL	If Then STU NUMBER_IN_COLLEGE
FAPDS_NUMFAM	If Then STU NUM_FAMILY_MEMBERS
FAPDS_ORPHAN	If Then And Example of ORPHAN
FAPDS_ST_SEL	If Then Example STATE_AGNCY_RLS
FAPDS_VA_BEN	Stored Value MONTHLY_VET_BEN
FAPDS_VETERN	If Then Example VETERAN status
FAPDS_WORK1	STUDENT_WORKSHEET_A
FAPDS_WORK2	STUDENT_WORKSHEET_B
FAPDS_WORK3	STUDENT_WORKSHEET_C
FAPDTGTRMNED	Award using I_TRGT_FED_RMNEED
FAPDTIV_ELIG	If Then Example: TITLEIV_ELIG
FAPDTOTALINC	Stored Value of TOTAL_INCOME
FAPDTOTPRCNT	Stored Value TOTAL_PAR_CONTRIB
FAPDTOTSCONT	Stored Value TOTAL_STU_CONTRIB
FAPDTRANS_DT	Award using TRANS_PROCESS_DT

Equation Name	Description
FAPDUGRADS	UNDERGRADS
FAPDUMET1000	Select FED_RMNEED >= 10,000
FAPDUNGRADS	Undergraduates
FAPDVALIDEFC	Award using VALID_EFC_CALC
FAPDVGAPAWRD	VGAP Award Amount
FAPDVIRGNRES	If Then: STATE_RESIDENCE = VA
FAPD_APPDATE	IF THEN DATE > 2003/01/01
FAPD_IM_#COL	Award using Stu Nbr in College

SFTD* — SF Tuition Calculation Delivered Equations

Equation Name	Description
SFTDBILLUNIT	Billing Units
SFTDCSSTDYFE	Case Study Fees
SFTDMDLABRAT	Medical School Laboratory Fees
SFTDMDSCTUIT	Medical School Tuition
SFTDMDSPECLT	Medical Speciality
SFTDMDTESTSC	Medical School Test Scores
SFTDRSRCHFEE	Research Project Fees
SFTDUGRAD	Undergraduate
SFTDUGRDAMT	SF UGRD Pay Amount
SFTDUGRDSEL	SF UGRD Select

Viewing Sample Equations

You can view any equation that PeopleSoft delivers on the Equation Dtl (equation detail) page (Set Up SACR, Common Definitions, Equation Engine, Review Equations).

Loan Validation Edit Equation

This is a loan validation edit that checks if the borrower has been defined on the loan origination table.

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	SKIP			Borrower Missing
2	ASSIGN	Local Variable	EQUATION_NAME	
3		String	FACRBORROW01	
4	END ASSIGN			
5	CALL	Equation	FACEDGETDEST	
6	CALL PARMS			
7		Local Variable	EQUATION_NAME	
8	END CALL PARMS			
9	IF			
10		Global Variable	DEST_ACTV	
11	<>			
12		String	Y	Edit not active
13	THEN			
14	RETURN			
15	END IF			
16	IF			
17		Table	LOAN_ORIGNATN	
18		Field	BORR_EMPLID	
19	=			
20		String		
21	THEN			
22	CALL	Equation	FACEDLOGERR	
23	CALL PARMS			
24		Local Variable	EQUATION_NAME	
25	END CALL PARMS			
26	END IF			
27	RETURN			

Satisfactory Academic Progress Equation

This is a hold/release demonstration equation to verify satisfactory academic progress for a student.

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	SKIP			Satisfactory Academic Progress Check
2	FIND FIRST	Local Variable	FOUND_STDNT_ AID_ATRBT	
3		Table	STDNT_AID_ ATRBT	
4		Keyed Global Equal	EMPLID	
5		Keyed Global Equal	INSTITUTION	
6		Keyed Global Equal	AID_YEAR	
7		Keyed Global Equal	TABLE_ID	
8	END FIND			
9	IF			
10	NOT			
11		Local Variable	FOUND_STDNT_ AID_ATRBT	
12	Then			
13	Message	String	No row in STDNT_ AID_ATRBT	
14		String	for key values	
15		Global Variables	EMPLID	
16		Global Variable	INSTITUTION	
17		Global Variable	AID_YEAR	
18		Global Variable	TABLE_ID	
19	END MESSAGE			
20	ASSIGN	Global Variable	RESULT	
21		String	FAILED	
22	END ASSIGN			

Line Number	Equation Keyword	Operand Type	Operand	Comment
23	ASSIGN	Global Variable	HR_MSG_SET_NBR	
24		String	14432	
25	END ASSIGN			
26	ASSIGN	Global Variable	HR_MSG_NBR	
27		String	00001	
28	END ASSIGN			
29	RETURN			
30	END IF			
31	IF			
32		Table	STDNT_AID_ ATRBT	
33		Field	SAT_ACADEMIC_ PRG	
34	=			
35		Prompted Value	Y	
36	OR			
37		Table	STDNT_AID_ ATRBT	
38		Field	SAT_ACADEMIC_ PRG	
39	=			
40		Prompted Value	P	
41	THEN			
42	ASSIGN	Global Variable	RESULT	
43		String	PASS	
44	END ASSIGN			
45	ELSE			
46	ASSIGN	Global Variable	HR_MSG_SET_NBR	
47		String	14432	

Line Number	Equation Keyword	Operand Type	Operand	Comment
48	END ASSIGN			
49	ASSIGN	Global Variable	HR_MSG_NBR	
50		String	00002	
51	END ASSIGN			
52	ASSIGN	Global Variable	RESULT	
53		String	FAILED	
54	END ASSIGN			
55	END IF			

Undergraduate Status Equation

This is a packaging selection equation that checks for undergraduate status.

Line Number	Equation Keyword	Operand Type	Operand	Comment
1	IF			
2		Global Variable	ACAD_CAREER	
3	=			
4		String	UGRD	
5	THEN			
6	ASSIGN	Global Variable	A_SELECT	
7		String	T	
8	END ASSIGN			
9	ELSE			
10	ASSIGN	Global Variable	A_SELECT	
11		String	F	
12	END ASSIGN			
13	END IF			

APPENDIX A

Campus Solutions Application Diagnostic Plug-ins

This chapter provides an overview of application diagnostics and lists the diagnostic plug-ins delivered with Campus Solutions 8.9.

Understanding Application Diagnostics

Enterprise PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Center.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the GSC support analyst working with you.
- Support for rowset retrieval.

Campus Solutions has delivered a number of diagnostic plug-ins, which are product-specific queries, with this release. We will post any plug-ins we develop post-GA on Customer Connection.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Running Diagnostics with Diagnostic Framework"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft HRMS Application Diagnostic Plug-ins"

Delivered Application Diagnostic Campus Solutions Plug-Ins

These tables list the diagnostic plug-ins delivered by product.

Academic Advisement

Plug-In Name and Description	Required Parameters	Provides a diagnosis of...
SAA_STUDENT_INFO: retrieves all data used to process a DPR for a student.	An employee ID is a required parameter for the diagnostic tool to return valid information.	The SAA_STUDENT_INFO application package retrieves the requirement terms from ACAD_PROG, ACAD_PLAN, and ACAD_SUBPLAN records for a student. It also retrieves the following current records for a student: • ACAD_PROG • ACAD_PLAN • ACAD_SUBPLAN • STDNT_ENRL • TRNS_EXTR_VW • TEST_EXTR_VW • OTHR_EXTR_VW The application package retrieves the following appropriate records for a student: • RG_GRP_TBL • RQ_GRP_DETL_TBL • RQ_MAIN_TBL • RQ_LINE_TBL • RQ_LN_DETL_TBL • CLST_MAIN_TBL • CLST_DETL_TBL

Campus Community

Plug-In Name and Description	Required Parameters	Provides a diagnosis of...
SCC_EMPLID_VALIDATN: retrieves all data needed to investigate problems creating a new emplid.	None	• Selects MAX Emplid from PERS_DATA_EFFDT. • Selects EMPLID_LAST_EMPL from INSTALLATION. • Counts number of records in PERS_DATA_EFFDT with EMPLID of "NEW".
SCC_SEVIS_REG_EVENT: retrieves all data needed to investigate problems when registration events don't trigger for SEVIS students.	The following parameters are required for the diagnostic tool to return valid information: • EmplID of Student • SEVIS School ID • OprID from Batch Submission • Run Control ID from Batch Submission	• Queries I20_FORM to verify a records exists and displays "Y" if the value of SEV_FUNDING_VERIFY is "Y". • Queries SEV_MST_ADDR to verify no inactive records for the student. • Queries SEV_MST_ADDR to verify no inactive records for the student. • Queries SEV_MST_REG to verify no inactive records for the student. • Verifies a valid row exists in RUNCTL_CCSEVCMP. • Verifies ASOF_DATE in RUNCTL_CCCMPTRM is less than today's date. • Verifies student has a record in SEV_MST_REG matching the term value in RUNCTL_CCCMPTRM. • Verifies student has a record in STDNT_CAR_TERM matching the term value in RUNCTL_CCCMPTRM. • Verifies student has a record in STDNT_ENRL matching the term value in RUNCTL_CCCMPTRM.

Financial Aid

Plug-In Name and Description	Required Parameters	Provides a diagnosis of...
SFA_FA_TERM: retrieves all data needed to investigate problems creating new FA-Term records.	These are the parameters required for the diagnostic tool to return valid information. • Emplid of Student • Institution • Student Career • Term • Aid Year • Oprid	• Queries against STDNT_CAR_ TERM to get FA flags from that record. • Queries against STDNT_CAR_ TERM to get FA flags from that record. • Student's aid year activation. • FA Term setup for aid year/career. Queries FATRMP_CAR_TRM to verify the term is defined. • Gets values from FA Term Drivers Setup. Queries RUN_CTL_FATDVRS for values. • Student's admissions and records activation and effective date. Queries STUDENT_AID to verify correct record exists. • Expected student's grad term. Queries ADM_APPL_PROG and ACAD_PROG for the student. • Gets Session Code, Session Code Census Date, FA Term Census Date and FA Term Locked flag. • SESSION_CODE and CENSUS_DT from SESSION_ TBL, FA_CENSUS_DATE and LOCK_FATERM from FATRMP_CAR_TRM. • Displays FA_ELIGIBILITY and FA_STATS_CALC_REQ for all records in STDNT_CAR_TERM for the student. • Displays all records in STDNT_FATU_DRV for the student.

Plug-In Name and Description	Required Parameters	Provides a diagnosis of...
SFA_PKG_DATA: retrieves all data needed to investigate problems creating FA packaging records.	These are the parameters required for the diagnostic tool to return valid information: • Emplid of Student • Institution • Student Career • Term • Aid Year • Oprid • Batch Sequence Number	• Data in PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB. • Queries against PKG_BATCH_AWD, PKG_BATCH_DISB, STDNT_AWD_PKG, STDNT_PKG_DISB, STDNT_AWARDS, STDNT_AWRD_DISB for the student. • Temp packaging tables matching data in actual packaging tables. • Data in DISB_SPLIT_CD, DISB_ID_SPLIT, DISB_PLAN_TBL, and DISB_ID_TBL. Queries against these tables for codes used when processing the student. • Data in STDNT_AGGR_LIFE and STDNT_AGGR_SCHL. Display totals from SFA_AGGR_BALANCE and EXPECTED_AWARD.

Student Financials

Plug-In Name and Description	Additional Parameters	Provides a diagnosis of...
SSF_PAYMENT: retrieves all data needed to investigate problems with posting payments in Student Financials.	• Business Unit • Emplid of Student • Item Number • Payment ID Number	• Queries against PS_PAYMENTS_ TBL to display the CHARGE_ PRIORITY and STRM. • Queries against ITEM_SF to get the item term for the charge. • Queries against Charge Priority Tree to retrieve the SETID, TREE NAME, and TREE NODE for the charge priority. • Queries against the PMT_CHRG_ PRIOR and PMT_CHRG_TBL to get the nodes in the charge priority list. • Queries against the PMT_CHRG_ PRIOR and PMT_CHRG_TBL to get the pay future term, pay prior term, and pay future year flags. • Queries against ITEM_SF to retrieve a payment's unpaid balance. • Queries against ITEM_SF to retrieve a charge's unpaid balance.

Plug-In Name and Description	Additional Parameters	Provides a diagnosis of...
SSF_REFUNDING: retrieves all data needed to investigate problems with refunding a charge.	• Business Unit • Emplid of Student • Item Number • Payment ID Number	• Queries against ITEM_SF to get the item's outstanding balance, EFFDT, number of days encumbered, earning code if a refund, type of payment if a refund. • Queries against the setup table to determine the maximum and minimum refund amount, determine if debit balances are allowed to be refunded, determine if item type is marked as refundable and if a paygroup is associated with it. • Queries POSTED_DATE, PAYMENT_METHOD from PAYMENT_TBL to determine the posted date and if it is a credit card transaction. • Queries ACCOUNT_BALANCE from ACCOUNT_TOT_VW for the student's overall balance.
SSF_WEB_CC: retrieves all data needed to investigate problems with credit card processing over the web.	• Business Unit • Emplid of Student • Item Number • Payment ID Number	• Queries against SF_PAYMENT for SF_POST_STATUS and SF_PAYMENT_STATUS values. • Looks for a non-zero value in SF_PAYMENT.MESSAGE_SET_NBR and MESSAGE_NBR. • Looks for the value of SF_PAYMENT_STATUS. • Looks for the Institution's Set values. • Determines whether the customer is set up to process real-time authorizations and settlement, and if the customer is set up to post in real time. • Queries against SF_PAYMENT_LOG for the history of payment attempts.

APPENDIX B

Campus Solutions Application Fundamentals Reports

This appendix provides an overview of the reports included in the Application Fundamentals for Campus Solutions and enables you to:

- View summary tables of all reports.
- View report details and tables accessed for selected reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Campus Solutions Application Fundamentals Reports: A to Z

These tables list the reports associated with processes described in this PeopleBook. The reports listed are Crystal and SQR reports and are sorted by Report ID.

This section discusses:

- General installation reports.
- Student Financials security reports.
- Academic institution and Student Records setup reports.

See Also

Appendix B, "Campus Solutions Application Fundamentals Reports," Campus Solutions Application Fundamentals Reports: Selected Reports, page 376

General Installation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CCDATADC Data Dictionary − Student Administration	Lists, alphabetically by field name, all fields in Campus Solutions, including the description, type, size, and format of each field.	Set Up SACR, Product Related, Student Records, Reports, Data Dictionary	PRCSRUNCNTL
PER702 Installation Table	Lists the information that you defined in the Installation Table component.	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
Per708 Country Table	Lists the country description and address formats that you defined in the Country Table component.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL

PeopleSoft Enterprise Student Financials Security Reports

Report ID and Report Name	Description	Navigation	Run Control Page
SF800 Business Unit Permission List	Lists the business units that you associated with each permission list on the Perm List − Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Business Unit	PRCSRUNCNTL_SF
SF801 Business Unit User ID	Lists the business units that you associated with each user ID on the User ID − Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Business Unit	PRCSRUNCNTL_SF
SF802 Cashier's Office Permission List	Lists the cashier offices for each business unit that you associated with a permission list on the Perm List − Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Report, Cashier Office	PRCSRUNCNTL_SF
SF803 Cashier's Office User ID	Lists the cashier offices for each business unit that you associated with each user ID on the User ID − Business Unit page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Report, Cashier Office	PRCSRUNCNTL_SF
SF804 Credit Card Permission List	Lists the permission lists you gave access to view the entire credit card number on the Perm List − Credit Card page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Credit Card	PRCSRUNCNTL_SF

Report ID and Report Name	Description	Navigation	Run Control Page
SF805 Credit Card User ID	Lists the user IDs you gave access to view the entire credit card number on the User ID − Credit Card page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Credit Card	PRCSRUNCNTL_SF
SF806 Company Permission List	Lists the companies that you associated with each permission list on the Perm List − Company page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Company	PRCSRUNCNTL_SF
SF807 Company User ID	Lists the companies that you associated with each user ID on the User ID − Company page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Company	PRCSRUNCNTL_SF
SF808 General Setup	Lists the Security Views defined and then lists the Security Options that you defined for Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Process, General Setup Report	PRCSRUNCNTL_SF
SF809 Item Type Permission List	Lists the item types and item type tree nodes that you associated with each permission list on the Perm List − Item Type page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, Item Type	PRCSRUNCNTL_SF
SF810 Item Type User ID	Lists the item types that you associated with each user ID on the User ID − Item Type page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, Item Type	PRCSRUNCNTL_SF
SF811 SetID Permission List	Lists the setIDs that you associated with each permission list on the Perm List − SetID page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, Permission List Reports, SetID	PRCSRUNCNTL_SF
SF812 SetID User ID	Lists the set IDs that you associated with each user ID on the User ID − SetID page in Student Financials Security.	Set Up SACR, Security, Secure Student Financials, User Reports, SetID	PRCSRUNCNTL_SF

Academic Institution and PeopleSoft Enterprise Student Records Setup Reports

Report ID and Report Name	Description	Navigation	Run Control Page
SR701 Institution Table	Lists all academic institutions, including detailed information about each academic institution. This report references fields as defined on the Academic Institution 1 page and the Academic Institution 2 page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Institution Table	PRCSRUNCNTL
SR702 CIP Report	Lists all of the defined CIP codes in Campus Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the CIP Code Table (Classification of Instructional Programs code table) page.	Set Up SACR, Foundation Tables, Reporting Codes, Classification Code Reports, CIP Table	PRCSRUNCNTL
SR703 Hegis Code Report	Lists all of the defined HEGIS codes in Campus Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the HEGIS Code Table page.	Set Up SACR, Foundation Tables, Reporting Codes, Classification Code Reports, Hegis Code Table	PRCSRUNCNTL
SR722 Time Period Report	Lists all defined time periods in Campus Solutions, including setID, academic career, time period code, description, and short description. This report references fields as defined on the Time Period Table page.	Set Up SACR, Product Related, Student Records, Reports, Time Period Table	PRCSRUNCNTL
SR723 Academic Career Report	Lists, by academic institution, the academic careers within an academic institution, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR723a Academic Career Pointers Report	Lists, by academic institution, the academic careers within each academic career, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Pointers	PRCSRUNCNTL
SR724 Academic Organization Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization. This report references fields as defined on the Academic Organization Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Organization Table	PRCSRUNCNTL
SR724a Academic Organization FS Owner Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization and the financial support owners. This report references fields as defined on the Academic Organization FS Owner (academic organization financial support owner) page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Acad Organization FS Owner	PRCSRUNCNTL
SR724b Academic Organization HR Owner Report	Lists alphabetically the defined academic organizations in Campus Solutions, including details about each academic organization and the human resources owners. This report references fields as defined on the Academic Organization HR Owner (academic organization human resources owner) page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Acad Organization HR Owner	PRCSRUNCNTL
SR725 Academic Group Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report references fields as defined on the Academic Group Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Group Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR725a Course Career Catalog Nbr Range Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report also includes the academic careers and catalog number contained within each academic group. This report references fields as defined on the Academic Group Table page and the Academic Career Level Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Career Level Table	PRCSRUNCNTL
SR726 Subject Report	Lists, by academic institution, the subject areas within an academic institution, including the effective date, description, short description, formal description, academic organization, split ownership, and external subject area. This report references fields as defined on the Academic Subject Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Subject Table	PRCSRUNCNTL
SR726a Subject Owner Report	Lists, by academic institution, the subject areas within an academic institution, including detail about the subject areas, and the academic organizations that own the subject areas through split ownership. This report references fields as defined on the Academic Subject Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Subject Owner Table	PRCSRUNCNTL
SR728a Term and Session Report	Lists all the defined terms and sessions in Campus Solutions, including detailed information about each term and session. This report references fields as defined on the Term Table page and the Session Table page.	Set Up SACR, Foundation Tables, Term Setup, Reports, Term and Session	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR729 Academic Calendar Report	Lists all the defined academic calendars in Campus Solutions, with detailed information about each. This report references fields as defined on the Term Calendar 1 page of the Academic Calendar component.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Calendar Table	PRCSRUNCNTL
SR729a Academic Calendar Term Report	Lists all terms with defined academic calendars in Campus Solutions, with detailed information about each term's academic calendar. This report references fields as defined on these pages of the Academic Calendar component: Term Calendar 1, Term Calendar 2, Term Calendar 3.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Cal Term Table	PRCSRUNCNTL
SR729b Academic Calendar Session Report	Lists all sessions with defined academic calendars in Campus Solutions, with detailed information about each session's academic calendar. This report references fields as defined on these pages of the Academic Calendar component: Session Calendar 1, Session Calendar 2.	Set Up SACR, Foundation Tables, Term Setup, Reports, Academic Cal Session Table	PRCSRUNCNTL
SR730 Academic Program Report	Lists all defined academic programs in Campus Solutions, including detailed information about each academic program. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Program Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR730a Academic Program Owner Report	Lists all defined academic programs in Campus Solutions, including detailed information about each academic program and detailed information about academic organization ownership. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Program Owner	PRCSRUNCNTL
SR730b Home Campus Report	Lists all defined academic programs in the system, including detailed information about each academic institution and information about campuses linked to each academic institution. This report references fields as defined on these pages of the Academic Program Table component: Program 1, Program 2, Owner, Taxonomy, Campus.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Home Campus Table	PRCSRUNCNTL
SR731 Academic Plan Report	Lists all defined academic plans in Campus Solutions, including detailed information about each academic plan. This report references fields as defined on these pages of the Academic Plan Table component: Academic Plan Table, Academic Plan Print Options, Academic Plan Taxonomy.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Plan Table	PRCSRUNCNTL
SR731a Academic Plan Owner Report	Lists all defined academic plans in Campus Solutions, including detailed information about each academic plan and about academic organization ownership. This report references fields as defined on all pages of the Academic Plan Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Plan Owner	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR732 Academic Sub-Plan Report	Lists all defined academic subplans in Campus Solutions, including detailed information about each academic subplan. This report references fields as defined on the Academic Sub-Plan Table component.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Academic Sub-Plan	PRCSRUNCNTL
SR736 Campus Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, and location. This report references fields as defined on the Campus Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Campus Table	PRCSRUNCNTL
SR736a Campus Location Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, short description, and location code. This report references fields as defined on the Campus Table page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Campus Location Table	PRCSRUNCNTL
SR738 Career Pointer Exception Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description. This report references fields as defined on the Career Pointer Exception Rule page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Career Pointer Exception	PRCSRUNCNTL
SR738a Career Pointer Exception Detail Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description, and rule details about requested courses. This report references fields as defined on the Career Pointer Exception Rule page.	Set Up SACR, Foundation Tables, Academic Structure, Reports, Career Pointer Except Detail	PRCSRUNCNTL
SRSECVWU SA Security View Update report	Lists current component security setup data for the institution. Details such as component name, security level, and Add Search record settings are listed on the report. Use this report to get a complete snapshot of the security views data set up at the institution.	Set Up SACR, Security, Secure Student Administration, Process, Security Views Update	RUNCTL_SRSECVWU

Campus Solutions Application Fundamentals Reports: Selected Reports

This section provides detailed information on individual reports including important fields and tables accessed. The reports are listed alphabetically by report ID.

SRSECVWU – Security Views

COMPONENT Displays the name of the component name as entered on the Security Views page.

GLOBAL Displays the status of the Global Security check box on the Security Views page. *Yes* indicates a status of selected, *No* indicates a status of cleared.

MENUNAME When the Global Security option is set to *NO,* or cleared, this column displays the specific menu name, as entered on the Security Views page.

BARNAME When the Global Security option is set to *NO,* or cleared, this column displays the specific bar name, as entered on the Security page.

SECURITY LEVEL Displays the value entered in the Security field on the Security Views page. Options include: *None, Institution, Career, Program,* and *Plan.*

SEARCH RECORD Displays the search record for the component. This value is not specified on the Security Views page. The search record is specified in PeopleSoft Application Designer on the Properties page for the component.

ADD SRCH REC (add search record) Displays the Add searchrecord (if any) for the component. This value is not specified on the Security Views page. The Add searchrecord is specified in Application Designer on the Properties page for the component. A value of *N/A* indicates that the component has no add search record.

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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