PeopleSoft®

PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xvii

PeopleSoft Application Prerequisites xvii

PeopleSoft Application Fundamentals xvii

Documentation Updates and Printed Documentation xviii

Obtaining Documentation Updates xviii

Ordering Printed Documentation xviii

Additional Resources xix

Typographical Conventions and Visual Cues xx

Typographical Conventions xx

Visual Cues xxi

Country, Region, and Industry Identifiers xxii

Currency Codes xxii

Comments and Suggestions xxii

Common Elements Used in PeopleBooks xxiii

Preface

PeopleSoft Enterprise Campus Self Service Preface xxv

PeopleSoft Products xxv

PeopleSoft Enterprise Campus Solutions Application Fundamentals xxv

PeopleBook Structure xxv

Chapter 1

Getting Started with PeopleSoft Enterprise Campus Self Service 1

Campus Self Service Overview 1

Campus Self Service Business Processes 1

Campus Self Service Implementation 4

Chapter 2
Understanding Campus Self Service.....5

Chapter 3
Setting Up Type Control.....7
Setting Up Type Control.....7
Page Used to Set Up Type Control.....7
Setting Type Controls.....7

Chapter 4
Setting Up Self-Service Student Records.....11
Setting Up Self-Service Features for Student Records.....11
Pages Used to Set Up Self-Service Student Records.....12
Defining Student Records Setup.....12
Defining Class Search Setup.....14
Setting Up Weekly Schedule Time Periods.....16
Setting Up Self-Service Student Center.....16
Understanding Defining Student Center Setup Options.....16
Page Used to Define Student Center Setup Options.....16
Defining Student Center Setup Options.....17
Setting Up Self-Service Faculty Center.....20
Understanding Defining Faculty Center Options.....20
Page Used to Define Faculty Center Setup Options.....21
Defining Faculty Center Setup Options.....21

Chapter 5
Setting Up Self-Service Student Financials.....23
Prerequisites.....23
Setting Up SF Merchants.....23
Setting Up Institution Sets.....24
Understanding Institution Sets.....24
Pages Used to Set Up Institution Sets.....24
Defining Basic Institution Set Parameters.....24
Defining Self Service ePayment Use for Institution Sets.....32
Setting Up Self Service Options.....36
Page Used to Set Up Self Service Options.....36
Defining Business Unit Labels.....36

Setting Up Self Service Payment Messages....36

Chapter 6
Setting Up Self Service for Financial Aid....37
Understanding Self Service for Financial Aid....37
Setting Up Self Service Inquiry Options....37
Page Used to Set Up Self Service Options....37
Defining Self Service Options....38
Setting Up Self Service Awarding Options....40
Page Used to Set Up Self Service Awarding....41
Setting Up Self Service Awarding....41
Setting Up Self Service Actions and Access in Packaging....44
Pages Used to Define Self Service Actions and Access in Packaging....45
Defining Self Service Actions in Packaging....45
Defining Self Service Access in Packaging....46
Changing Award and Inquiry Access....47
Modifying Self Service Loan Status Descriptions....47
Page Used to Modify Loan Status Description....48
Modifying Loan Status Descriptions....48
Creating User-Defined Text....49

Chapter 7
Setting Up Recruiting and Admissions Self Service....51
Understanding Self-Service Request Information....51
Prerequisites....51
Setting Up Self-Service Request Information....51
Pages Used to Set Up Self-Service Request Information....52
Enabling Segments and Prospect Career Fields....52
Setting Up Institution and Career Parameters....53

Chapter 8
Using Self-Service Enrollment....57
Understanding Self-Service Enrollment....57
Prerequisites....58
Viewing Enrollment Appointments Through Self-Service....58
Page Used to View Enrollment Appointments....58
Viewing Your Class Schedule....58

Pages Used to View Your Class Schedule.....59
Using the Wish List.....59
Pages Used to Use the Wish List.....59
Adding Classes.....59
Pages Used to Add Classes.....60
Dropping Classes.....60
Pages Used to Drop Classes.....60
Swapping Classes.....60
Pages Used to Swap Classes.....61
Editing Classes.....61
Pages Used to Edit Classes.....61
View Your Exam Schedule.....62
Page Used to View Your Exam Schedule.....62
Using Self-Service Pages and LMS Authentication.....62
Pages Used to Access the LMS Website.....62
Using the LMS Button to Access the LMS Website.....62
Using the Provider Link to Access the LMS Site.....63

Chapter 9
Using Self-Service Student Financials.....65
Understanding How to Use Self Service for Student Financials.....65
Viewing Outstanding Charges, Payments, and Financial Aid.....65
Page Used to View Charges and Payments.....66
Viewing an Account Summary.....67
Viewing Account Activity.....69
Viewing Charges Due Details.....70
Viewing Details by Due Date.....71
Viewing Details by Charge.....72
Viewing Detail by Charge.....73
Viewing Payment History.....74
Viewing the Charges Paid by a Payment.....75
Pending Financial Aid.....76
Creating Payment Profiles.....77
Understanding Payment Profiles.....77
Pages Used to Create Self Service Payment Profiles.....78
Adding and Deleting Payment Profiles.....78
View and Edit Payment Profile Details.....78
Making Self Service Payments.....79
Understanding Self Service Payments.....80

Prerequisites....80
Pages Used to Make Self Service Payments....81
Selecting Payment Methods....81
Specifying Payment Details....82
Specifying Payment Amounts....84
Confirming Payments....87
Viewing Successful Payment Results....88
Viewing Declined Payment Results....88

Chapter 10
Using Self Service Financial Aid....91
Understanding Financial Aid Self Service....91
Accepting, Declining, and Reducing Awards....91
Pages Used to Accept, Decline, and Reduce Awards....92
Selecting an Aid Year....92
Accepting, Declining, and Reducing Awards Using Self Service....93
Viewing Award Detail....99
Using Administrative Requests....100
Understanding Administrative Requests....100
Page Used to Initiate and Update Administrative Requests....100
Defining Administrative Requests....100
Managing Batch Processing....102
Understanding Managing Batch Processing....102
Page Used to Process Batch Self Service....102
Processing Self Service Awards....102
Using Administrative Self Service Inquiry Pages....103
Pages Used to View Administrative Self Service Activity....104
Using Self Service Activity....104
Viewing Self Service Awarding Activity Detail....106
Removing a Student in Needs Review or Rejected Status....106
Viewing Self Service Batch Summary....107
Viewing Self Service Awarding Batch Detail....107
Viewing Rejected or Needs Review Self Service Awarding Activity Detail....108
Viewing Self Service Awarding Batch Error....108
Viewing Self Service Requests....109
Viewing Self Service Activity by Status....110
Viewing Student Self Service Pages by Aid Year....110
Understanding Viewing Self Service Inquiry Pages by Aid Year or Award Period....111
Pages Used to View Student Self Service Pages by Aid Year....111

Selecting an Aid Year to View....112
Viewing a Detailed Summary of Financial Aid by Aid Year....113
Viewing Financial Aid Eligibility by Aid Year....114
Viewing Estimated Financial Aid Budget by Aid Year....115
Viewing Expected Family Contribution by Aid Year....116
Selecting a Career to View by Aid Year....117
Viewing Loan Application Information by Aid Year....118
Viewing Declined Awards by Aid Year....118
Viewing Scheduled Disbursements by Aid Year....119
Viewing Student Self Service Pages by Award Period....120
Pages Used to View Student Self Service Pages by Award Period....121
Selecting an Award Period to View....122
Viewing Financial Aid Summary by Award Period....122
Viewing Financial Aid Eligibility by Award Period....124
Viewing Estimated Financial Aid Budget by Award Period....125
Viewing Expected Family Contribution by Award Period....126
Selecting a Career to View by Award Period....126
Viewing Loan Application Information by Award Period....126
Viewing Financial Aid Loan Status Information by Award Period....127
Viewing Declined Awards by Award Period....127
Viewing Scheduled Disbursements by Award Period....127

Chapter 11
Using Self-Service Campus Personal Information....129
Understanding PeopleSoft Self-Service Campus Personal Information....129
Understanding Self-Service User Preferences....130
Page Used to for Self-Service User Preferences....130
User Preferences Page....131
Understanding Self-Service Addresses, Names, Phones, and Demographic Data....131
Pages Used for Self-Service Addresses, Names, Phones, and Demographic Data....132
Using Self-Service Personal Attributes Data....134
Pages Used for Self-Service Personal Attributes....134
Using Self-Service Identification Data....135
Page Used for Self-Service Identification Data....135
Using Self-Service Participation Data....135
Pages Used for Self-Service Participation Data....135
Using Other Self-Service Biographical Data....137
Pages Used to Enter Other Self-Service Biographical Data....137
Using Self-Service Service Indicators Data....137

Pages Used for Self-Service Service Indicators Data....138
Using Self-Service Checklists Data....138
Pages Used for Self-Service Checklists Data....138

Chapter 12
Using Self-Service Academic Records....139
Viewing Grades....139
Page Used to View Grades....139
Requesting Official Transcripts....139
Prerequisites....139
Pages Used to Request a Self-Service Transcript....140
Viewing Unofficial Transcripts....140
Prerequisites....140
Pages Used to View Unofficial Transcripts....141
Viewing Advisors....141
Page Used to View Advisors....141
Requesting Enrollment Verifications....141
Pages Used to Request Enrollment Verifications....142

Chapter 13
Using Self-Service Degree Progress/Graduation....143
Viewing the Degree Progress Report Through Self-Service Pages....143
Pages Used to View the Degree Progress Report Through Self-Service Pages....143
Applying for Graduation Through Self-Service Pages....143
Understanding the Self-Service Application Process....144
Prerequisites....144
Pages Used to Apply for Graduation Through Self-Service Pages....144

Chapter 14
Using Self-Service Transfer Credit....145
Viewing Transfer Credit Reports Through Self-Service Pages....145
Page Used to View Transfer Credit Reports Through Self-Service Pages....145
Evaluating Transfer Credit Through Self-Service Pages....145
Understanding the Self-Service Modeling Transfer Credit Feature....145
Prerequisites....146
Pages Used to Evaluate Transfer Credit Through Self-Service Pages....146

Chapter 15
Using Self-Service Student Recruiting.....151
Using Self Service Student Recruiting for Recruiting and Admissions.....151
Prerequisites.....151
Pages Used to Manage Student Recruiting for Recruiting and Admissions.....151

Chapter 16
Using Self-Service Advisement.....153
Viewing Advisee Information Through Self-Service Pages.....153
Pages Used to View Advisee Information Through Self-Service.....153
Processing Self-Service Advisement Reports.....155
Prerequisites.....155
Pages Used to Perform Self-Service Advising.....156

Chapter 17
Using Self-Service Outreach.....157
Understanding PeopleSoft Outreach for Fundraising.....157
Prerequisites.....157
PeopleSoft Outreach Business Processes.....158
Creating and Maintaining the My Prospects Workset.....158
Page Used to Create and Maintain the My Prospects Workset.....158
Running the My Prospects Process.....158
Assigning Resources to the My Prospects Workset.....159
Managing An Action Plan.....160
Pages Used to Manage an Action Plan.....161
Reviewing Reminders.....161
Viewing Assigned Actions.....161
Managing Prospect Strategies.....162
Pages Used to Manage Prospect Strategies.....162
Selecting a Prospect Name.....162
Editing or Adding a Prospect Strategy.....164
Editing or Adding Prospect Strategy Details.....164
Linking a Prospect Strategy with Initiatives.....165
Linking a Prospect Strategy with Actions.....165
Viewing a Prospect Strategy Summary.....166
Managing Prospect Actions.....166
Pages Used to Manage Prospect Actions.....166
Selecting a Prospect Name Prior to Managing Prospect Actions.....168

Editing or Adding a Prospect Action....168
Editing or Adding Prospect Action Details....168
Editing or Adding Ask Information....169
Editing or Adding Prospect Action Descriptions....169
Assigning Resources to Prospect Actions....169
Linking Prospect Actions to Initiatives....170
Viewing a Prospect Action Summary....170
Selecting a Prospect Name Prior to Completing an Action....170
Selecting an Action to Complete....170
Completing a Prospect Action....170
Selecting a Prospect Name Prior to Completing a Contact Report....171
Entering Contact Report Details....171
Viewing a Contact Report Summary....172
Sending a Contact Report....172
Sending Updated Biographic Information....173
Analyzing Prospect Information....173

Chapter 18
Using Student Center....179
Understanding Self-Service Student Center....179
Using Self-Service Student Center....180
Page Used to Use Self-Service Student Center....180

Chapter 19
Using Faculty Center....181
Understanding the Self-Service Faculty Center....181
Using the Self-Service Faculty Center....181
Pages Used to Use the Self-Service Faculty Center....182
Entering Grades through Self-Service....183
Prerequisites....183
Pages Used to Enter Grades through Self-Service....183
Entering Mid-Term and Final Grades....183
Viewing Self-Service Class Rosters....184
Pages Used to View Self-Service Class Rosters....184
Using Instructor Self-Service Pages and LMS Authentication....184
Pages Used to Access the LMS Website....185
Using the LMS Button to Access the LMS Website....185
Using the Provider Link to Access the LMS Site....185

Chapter 20
Using Self-Service Student Admissions.....187
Using Self-Service Request Information.....187
Understanding Self-Service Request Information.....187
Pages Used to Use Self-Service Request Information.....188
Using Self-Service Accept or Decline Admission.....189
Pages Used to Use Self-Service Accept Admission.....190
Using Self-Service View Application Status.....191
Pages Used to Use Self-Service View Application Status.....191
Viewing Application Status.....191

Chapter 21
Using Self-Service Course Catalog and Schedule.....193
Common Elements.....193
Searching for Classes Using Self-Service Pages.....193
Prerequisites.....193
Pages Used to Search for Classes Using Self-Service Pages.....194
Selecting Institution and Term for Class Search.....194
Selecting Search Criteria and Searching for Classes.....195
Reviewing Class Search Results.....197
Viewing Class Search Details.....198
Browsing the Course Catalog.....199
Reviewing Course Catalog Details.....200

Chapter 22
Using Community Directory Search.....201
Understanding Self-Service Community Directory Search.....201
Generating Community Directories.....201
Page Used to Generate Community Directories.....201
Generating Online Directories.....202
Searching Community Directories.....203
Pages Used to Search the Directories.....203
Specifying the Directory to Search.....203
Searching a Community Directory.....204

Glossary of PeopleSoft Terms.....209

Index 231

About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

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

PeopleSoft Enterprise Campus Self Service Preface

This preface discusses:

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

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

PeopleSoft Products

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

PeopleSoft Enterprise Campus Solutions Application Fundamentals

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

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

PeopleBook Structure

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

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

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

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

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

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

CHAPTER 1

Getting Started with PeopleSoft Enterprise Campus Self Service

This chapter discusses:

- Campus Self Service overview.
- Campus Self Service business processes.
- Campus Self Service integrations.
- Campus Self Service implementation

Campus Self Service Overview

PeopleSoft Enterprise Campus Self Service offers role-based and function-based self-service functionality that enable you to provide users with self-service access to information and transactions over the internet. You can present the self-service functionality as delivered or modify it to present specific features that your institution wants to make available, offering access to the online transactions that your institution's users need and perform most.

Allowing users to complete transactions by self-service significantly reduces the time that your staff must spend entering and maintaining administrative data.

Note. Campus Self Service integrates with PeopleSoft Enterprise Campus Solutions, and it is licensed separately.

Campus Self Service Business Processes

Campus Self Service business processes are extensions of information and functionality of PeopleSoft Enterprise Campus Solutions applications.

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

Campus Self Service enables you to provide self-service functionality from the following familiar PeopleSoft Enterprise Campus Solutions applications:

- *Campus Community*

Campus Community offers self-service Campus Personal Information and Community Directory Search.

The Community Directory Search self-service functionality enables you to provide searchable directories of members of your campus community online over the internet.

Campus Personal Information self-service provides configurable internet access to the following:

- Names, Addresses, Phone Numbers
- Emergency Contacts
- Extracurricular Activities
- FERPA Privacy Control
- Languages
- Work Experience
- Licenses and Certificate
- Publications
- Memberships
- Honors and Awards
- Service Indicators as Holds Lists
- Checklists as To Do Lists

• *Recruiting and Admissions:*

Recruiting and Admissions provides your users the ability to perform several transactions directly over the internet.

Recruiting and Admissions self-service provides configurable internet access to the following:

- Visitors can request information from your institution and a particular academic career and program. When visitors request information over the internet, they enter information about themselves that the system converts to prospect data.
- Applicants can accept or decline admission.
- Applicants can view their application status.
- Administrators can view prospect and applicant information by category, region, and organization.

• *Student Records:*

Student Records provides students and faculty the ability to perform several transactions directly over the internet.

Student Records self-service provides students or faculty access to the following:

- Student Center

  A self-service page that provides students a single entry point from which to begin navigation to student related transactions. The Student Center also presents to students, in one location, the information that is important to them, such as their class schedule, important dates, to do list, and account information.

- Wish List

  A shopping-cart-like feature that provides a staging area where students can plan and build their schedules for an upcoming term.

- Enrollment

  Students can add, drop, swap, and edit classes with the help of a step by step wizard feature exists that guides students through the processes. Students can also view assignments, class and exam schedules, and enrollment dates, and search for classes and browse the course catalog.

- Academic Records

  Students can view grades, request official transcripts, view unofficial transcripts, view advisor information, and request enrollment verification.

- Degree Progress/Graduation

  Student can view their degree progress report and apply for graduation.

- Transfer Credit

  Students can model transfer credit and run a transfer credit report.

- Faculty Center

  On the Faculty Center self-service page, instructors can view their class schedule, view advisee information, search for faculty or classes, access learning management system websites, and record new or drop-in advisee information.

• *Financial Aid:*

Financial Aid provides students the ability to perform several transactions directly over the internet.

Financial Aid provides students access to the following:

- Accept/Decline Awards

  Students can accept, decline, or reduce award amounts. They can request a change to their financial aid, cancel their aid, or request a meeting with a financial aid administrator.

- View Financial Aid

  Students can view their cost of attendance, expected family contribution, total aid, type of award, loan application status, loan amount, loan fee, and scheduled disbursement data.

• *Student Financials:*

Student Financials provides students and faculty the ability to perform several transactions directly over the internet.

Student Financials self-service provides students or faculty access to the following:

- Account Inquiry

  Students can view details about their financial account.

- Payment Profile

  Students can create and maintain payment profiles for credit card or eCheck account details.

- Make a Payment

  Students can use the payment wizard to make credit card or eCheck payments to their account.

• *Contributor Relations:*

Contributor Relations provides fundraisers with bundled prospect information in Outreach. For development officers who have responsibility for cultivating prospects and raising funds, Outreach enables them to access prospect information and giving strategy through a single location.

Outreach self-service functionality provides access to the following:

- Strategy information—to add, update, and view prospect strategies and link actions to those strategies. Then users can view strategy summaries and associated actions.
- Action Plans and Results—to add and update actions, and report results. Users can also view action and contact report summaries and clearances.
- To Do Lists—to create individual staff to do lists displaying information about prospects. Then users can view, sort, and update the lists.
- Analysis—access to a wide variety of online reports.

Campus Self Service Implementation

If you have licensed and implemented all of PeopleSoft Enterprise Campus Solutions, then most of the setup required to implement Campus Self Service is already completed. The additional setup specific to self service is discussed in this PeopleBook.

Campus Self Service has no PeopleSoft Setup Manager component interfaces.

CHAPTER 2

Understanding Campus Self Service

Campus Self Service offers role-based and function-based self-service functionality that enable you to provide users with self-service access to information and transactions over the internet. You can present the self-service functionality as delivered or modify it to present specific features that your institution wants to make available, offering access to the online transactions that your institution's users need and perform most.

Allowing users to complete transactions by self-service significantly reduces the time that your administrative staff must spend performing many administrative tasks:

Note. PeopleSoft Enterprise Campus Self Service integrates with PeopleSoft Enterprise Campus Solutions, but it is licensed separately.

CHAPTER 3

Setting Up Type Control

You can assign levels of control for the types of personal data that you want to provide to self-services users.

Setting Up Type Control

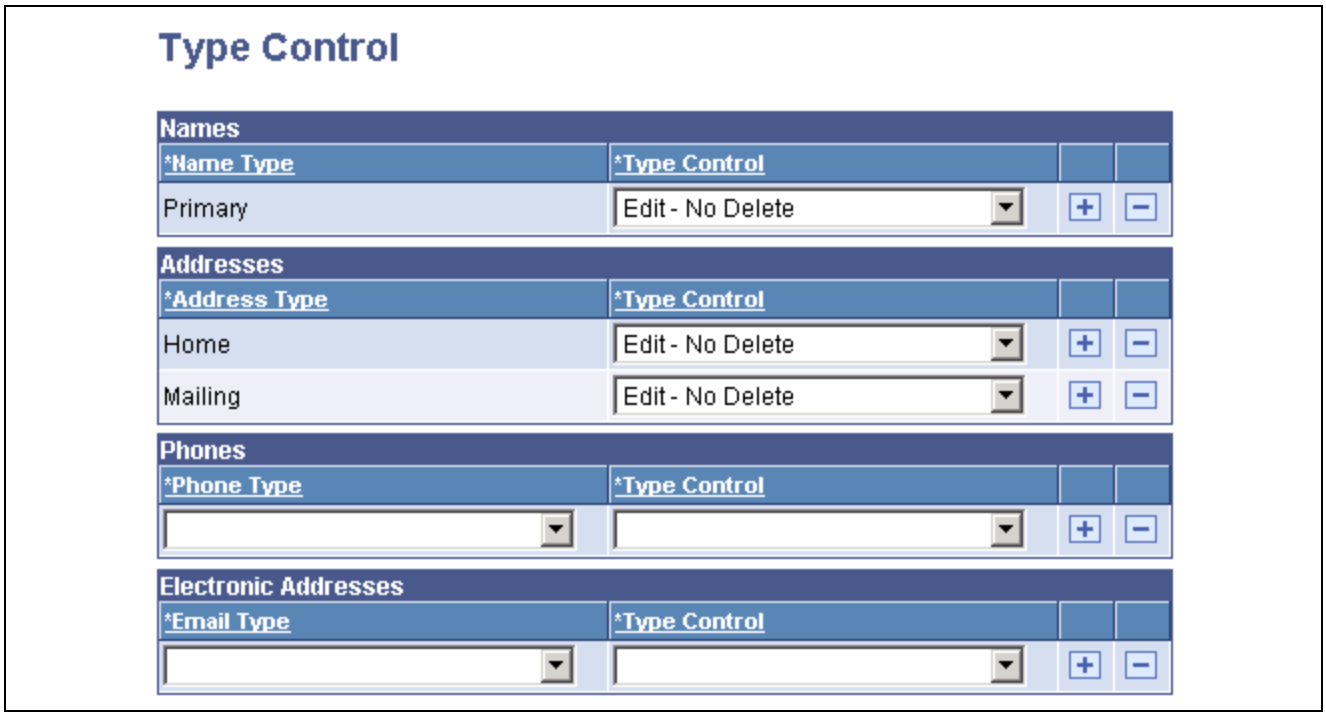
This section discusses how to set type controls.

Page Used to Set Up Type Control

Page Name	Object Name	Navigation	Usage
Type Control	TYPE_CNTL_SETUP	Set Up SACR, Common Definitions, Self Service, Type Control	Set type controls to identify the types of names, addresses, phones, and email addresses for self-service users to view, edit, or delete.

Setting Type Controls

Access the Type Control page.



Type Control page

Type Control

Select the level of control that you want to apply to the data type when you provide it to self service users. For example, if you want to make phone numbers available to self-service users and permit them to edit or delete the phone numbers, but you do not want them to be able to delete the *Home* phone type, select the control type of *Edit - No Delete* for that phone type.

Warning! If no type control is selected, the system uses *Full Edit.*

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

Display Only: Exposes this information to self-service users. Does not permit them to enter or edit the specified type or its associated data.

Do Not Display: Does not expose this information (neither the type nor its associated data) to self-service users.

Edit - No Delete: Exposes this information to self-service users. Permits them to edit the data, but does not permit them to delete the type.

Full Edit: Exposes this information to self-service users. Permits them to edit and delete the specified type and its associated data. (This is the least restrictive and the default value.)

Important! You cannot change the Name Type *(Primary)* or the Address Types *(Home* and *Mailing)* values. These are set on the Campus Community Installation Names/Addresses page.

PeopleSoft delivers these with *Edit - No Delete* type control level. You cannot apply the lesser restrictive control of *Full Edit* to them, however you can apply the more restrictive controls of *Display Only* or *Do Not Display.*

Self-services users can change data for these address types, but they cannot delete the types. Therefore the Delete (Home) address(es) and Delete (Mailing) address(es) links are never available on the Current Addresses page. If you modify these mapping types on the Installation Table, you must also modify the type control settings on the Type Control page.

CHAPTER 4

Setting Up Self-Service Student Records

This chapter discusses how to:

- Set up self-service features for Student Records.
- Set up self-service Student Center.
- Set up self-service Faculty Center.

Setting Up Self-Service Features for Student Records

To set up self-service Student Records, use the Student Records component (SSR_SS_ENRL_OPT) and the Weekly Schedule Time Period component (SETUP_TIME_PERIODS).

This section discusses how to:

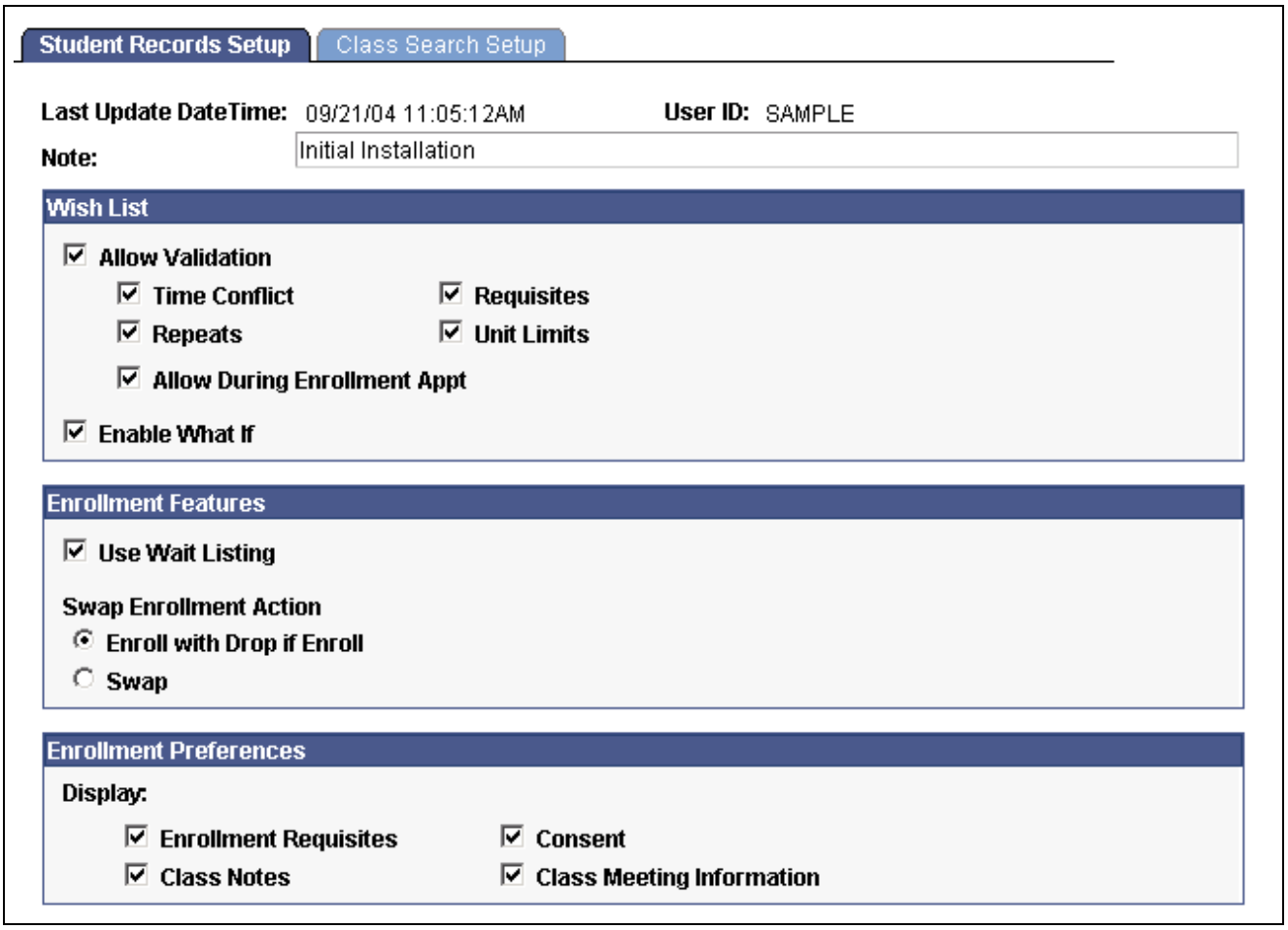
- Define Student Records setup.
- Define class search setup.
- Set up weekly schedule time periods.

Pages Used to Set Up Self-Service Student Records

Page Name	Object Name	Navigation	Usage
Student Records Setup	SSR_SS_ENRL_OPT	Set Up SACR, Common Definitions, Self Service, Student Records	Enable self-service features and define behavior for self-service Student Records functionality.
Class Search Setup	SSR_SS_CLSRCH_OPT	Set Up SACR, Common Definitions, Self Service, Student Records	Define optional setup parameters for self-service class search.
Weekly Schedule Time Periods	SETUP_TIME_PERIODS	Set Up SACR, Products Related, Student Records, Enrollment	Define the times that define ranges of time the system displays on the Weekly Schedule page (for both instructors and students). PeopleSoft delivers a set of time periods for every hour in a 24–hour period. You can modify or add to these values to meet your business requirements (for example, you can add half-hour intervals).

Defining Student Records Setup

Access the Student Records Setup page.



Student Records Setup page

Additional Fields

Note Enter a note. This field is for informational purposes only.

Wish List

Allow Validation Select this check box to enable the Validation feature. The Validation feature enables self-service users to validate their Wish List entries against a subset of edits from the Enrollment Engine. You can select which edits the Enrollment Engine runs. The options are time conflicts, repeats, requisites, and unit limits. If you select this check box, you must select at least one of these options. Clearing this option hides all references to validation in the system.

Time Conflicts Select this check box if you want the Enrollment Engine to check time conflicts while validating Wish List entries.

Repeats Select this check box if you want the Enrollment Engine to check repeats while validating Wish List entries.

Requisites Select this check box if you want the Enrollment Engine to check requisites while validating Wish List entries.

Unit Limits Select this check box if you want the Enrollment Engine to check unit limits while validating Wish List entries.

Allow During Enrollment Appt (allow during enrollment appointment) Select this check box to enable users to validate their Wish List entries during their enrollment appointment. If you select this check box, the Validate Selected button appears in the Wish List during the student's enrollment appointment. If you clear this check box the Validate Selected button is not available in the Wish List during the student's enrollment appointment. This prevents you from having to set up validation appointments that parallel your enrollment appointments.

Enable What If Select this check box to enable students to view a degree progress report to see what degree requirements the selected classes fulfill. If you select this check box, the following text appears on the Wish List: "What degree requirements will the selected classes fill?" Also, the Click here to find out link appears.

Enrollment Features

Use Wait Listing Select this check box to enable wait listing. If you clear this check box, the system hides all references to wait listings in self-service. Also, if you clear this check box, the system selects the Swap option by default and makes the Enroll with Drop if Enroll and Swap fields unavailable for edit.

Enroll with Drop if Enroll Select this check box to enable Drop if Enroll processing for self-service swaps. If you select this check box, when a student swaps a class on the self-service Swap page the Enrollment Engine only drops him from the class he wants to swap when he is enrolled into his preferred class. The Enrollment Engine will not drop him if he is only put on the wait list. Also, the Enrollment Engine processes the Swap To class with an enrollment action of Enroll.

Swap Select this check box if you want normal swap enrollment action processing on your self-service Swap page. The Enrollment Engine drops students from the unwanted class when the student is successfully enrolled or put on the wait list in the preferred class.

Enrollment Preferences

Enrollment Requisites Select this check box to display enrollment requisite information on the self-service Enrollment Preferences page during the enrollment process.

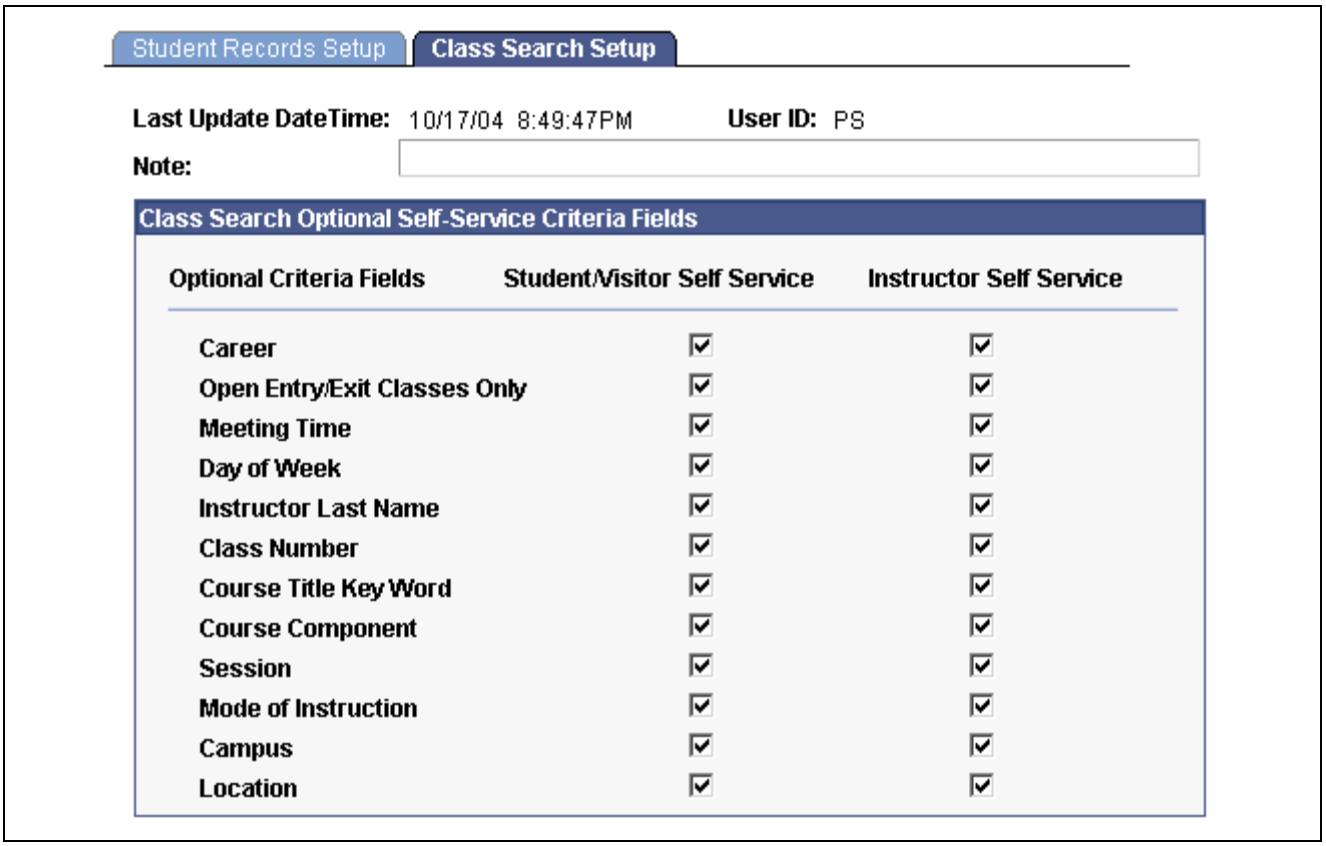
Class Notes Select this check box to display class notes information on the self-service Enrollment Preferences page during the enrollment process.

Consent Select this check box to display consent information on the self-service Enrollment Preferences page during the enrollment process.

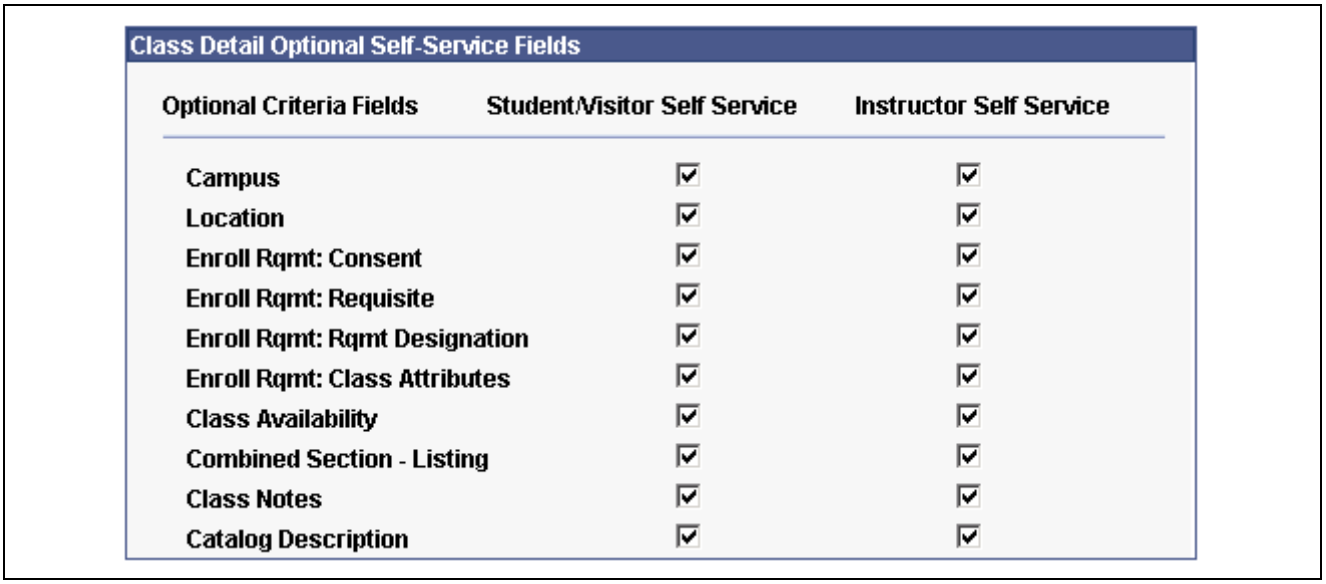
Class Meeting Information Select this check box to display class meeting information on the self-service Enrollment Preferences page during the enrollment process.

Defining Class Search Setup

Access the Class Search Setup page.



Class Search Setup page (1 of 2)



Class Search Setup page (2 of 2)

Class Search Optional Self-Service Criteria Fields

Select the search criteria fields that you want available in self-service class search for students/visitors and for instructors. For example, if you select Session for Instructor Self Service, then when instructors are using class search in self-service they will be able to use session as a search criteria.

Class Detail Optional Self-Service Fields

Select the fields that you want to appear on the self-service Class Detail page for students/visitors and for instructors. For example, if you select Enroll Rqmt: Requisite (enrollment requirement: requisite) for students/visitors, then when a student or visitor clicks on a class to view the Class Detail page, the system will show the enrollment requirement requisite information for that class. Clear these check boxes if you do want to provide this information on the self-service Class Detail page.

Setting Up Weekly Schedule Time Periods

Access the Weekly Schedule Time Period page.

Time Enter a range of time values to define the periods of time you want to display on the self-service weekly schedule. PeopleSoft delivers a set of time periods for every hour in a 24–hour period. You can modify these values.

Setting Up Self-Service Student Center

To set up the student center, use the Student Center component (SSS_STDNCTR_OPT).

This section provides an overview and discusses how to define self-service Student Center options.

Understanding Defining Student Center Setup Options

The Student Center is a self-service page that provides students a single entry point from which to begin navigation to student related transactions. It also presents to students, in one location, the information that is important to them, such as their class schedule, enrollment dates, and account information.

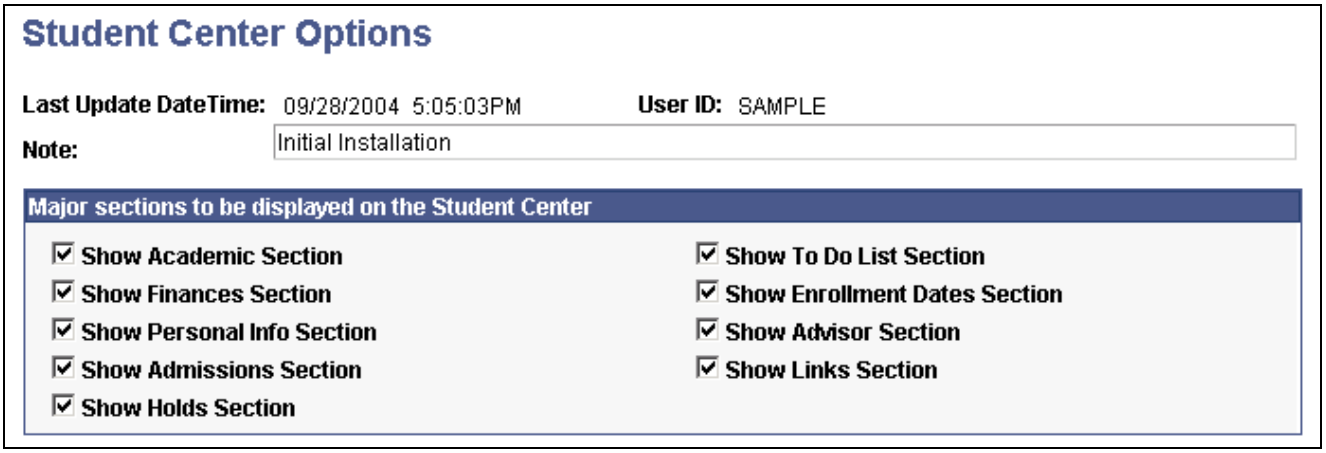
Using the Student Center Options page in conjunction with security setup, you can configure the Student Center to control the user experience for your students. On the Student Center Options page, you can decide which major sections appear on the Student Center. You can also use the student Center Options page to configure some of the individual items that are displayed on the Student Center. Using security setup you can limit your students' access to self-service transactions. You must use the Student Center Options page in conjunction with security setup to mold the experience you want your students to have. For example, if your institution uses the enrollment functionality in PeopleSoft Student Records, but does not use swap functionality, you can show the Academics section by selecting the Show Academic Section on the Student Center Options page, but not grant your students access to the Swaps page using security. In this case, the Academic section would appear on the Student Center but the swaps functionality would not appear. Also, if you do not display a feature on the Student Center, this does not remove it from the left side navigation. To remove a feature from the left side navigation you must do so through security.

Page Used to Define Student Center Setup Options

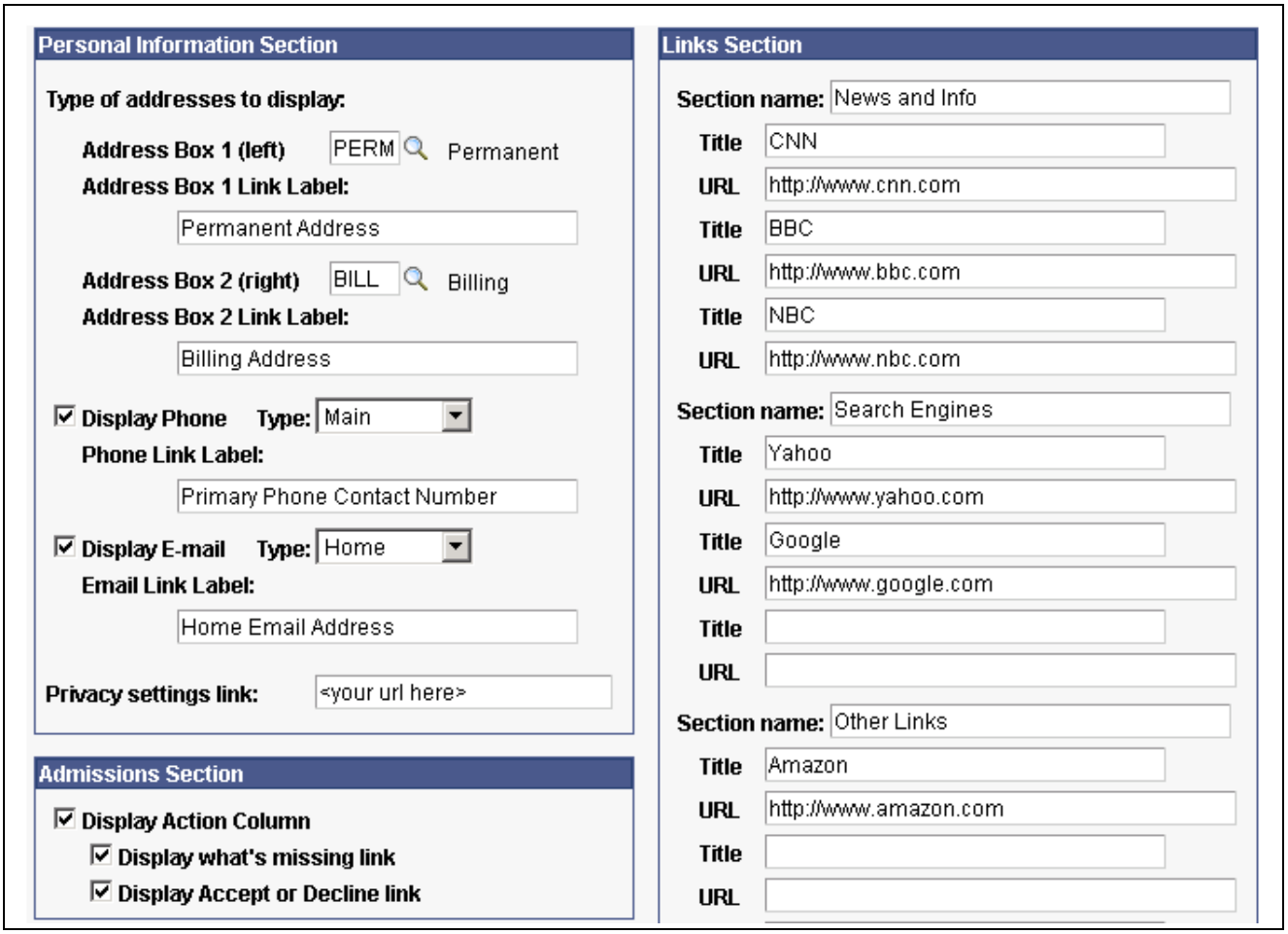
Page Name	Object Name	Navigation	Usage
Student Center Options	SSS_STDNCTR_OPT	Set Up SACR, Common Definitions, Self Service, Student Center	Define, by installation, the sections that you want to appear in the self-service Student Center for your students.

Defining Student Center Setup Options

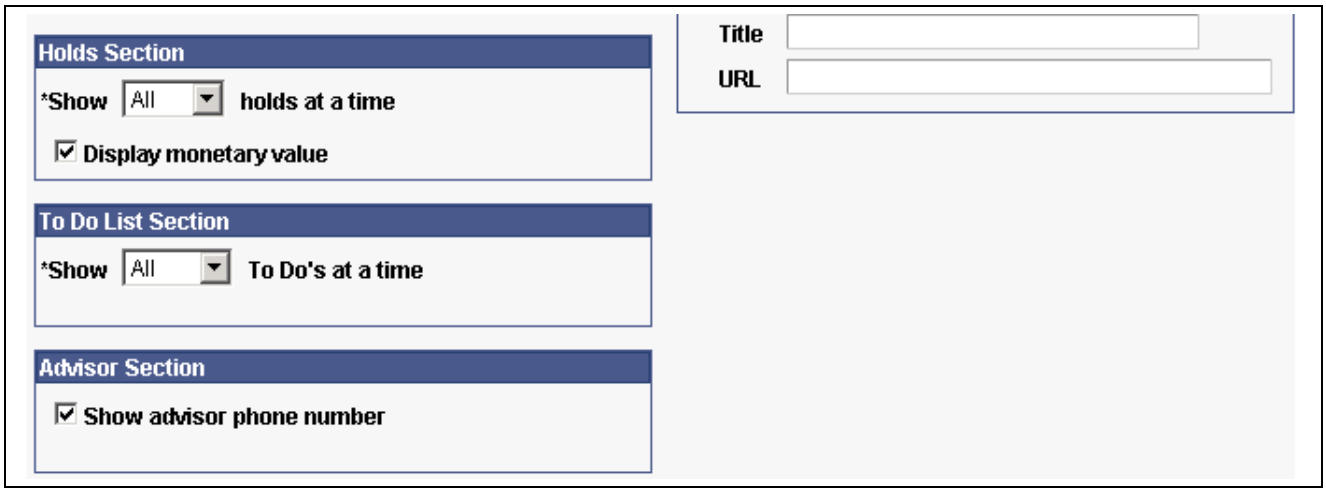
Access the Student Center Options page



Student Center Options page (1 of 3)



Student Center Options page (2 of 3)



Student Center Options page (3 of 3)

Note Enter a note. This field is for informational purposes only.

Major sections to be displayed on the Student Center

Show Academic Section Select this check box to show the Academic Section on the self-service Student Center page. This section contains links to My Class Schedule, Wish List, enrollment, and other Student Records functionality.

Show Finances Section Select this check box to show the Finances Section on the self-service Student Center page. This section contains links to PeopleSoft Student Financials and PeopleSoft Financial Aid functionality, such as Account Summary and View My Financial Aid.

Show Personal Info Section Select this check box to show the Personal Info Section on the self-service Student Center page. This section contains links to biographical information features, such as addresses, phone numbers, email address, emergency contacts, and user preferences. If you select this check box the fields in the Personal Information Section group box become available for edit.

Show Admissions Section Select this check box to show the Admissions Section on the self-service Student Center page. This section contains links to PeopleSoft Recruiting and Admissions functionality, such as applying to another academic program, requesting admissions information from your institution, or checking on the status of an application. If you select this check box, the fields in the Admissions Section group box become available for edit.

Show Holds Section Select this check box to show the Holds Section on the self-service Student Center page. If you select this check box, the fields in the Holds Section group box become available for edit.

Show To Do List Section Select this check box to show the To Do List Section on the self-service Student Center page. If you select this check box, the field in the To Do List Section group box becomes available for edit.

Show Enrollment Dates Section (show enrollment appointment section) Select this check box to show the Enrollment Dates Section on the self-service Student Center page. This section contains enrollment appointments, validation appointments, and open enrollment dates.

Show Advisor Section Select this check box to show the Advisor section on the self-service Student Center page. This section displays academic advisors and committees assigned to the student. Within the Advisor section, students click on the Details link to go to the View My Advisors page.

Show Links Section Select this check box to show the Links Section on the self-service Student Center page. If you select this check box, the fields in the Links Section group box become available for edit.

Personal Information Section

Address Box 1 (left) and **Address Box 2 (right)** Enter address types to display in the Personal Section on the Student Center page. Only address types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.

Address Box 1 Link Label and **Address Box 2 Link Label** Enter the label to be displayed for the address links on the Student Center page.

Display Phone Select this check box to display the students phone number on the Student Center page.

Type Enter a phone type to display. Only phone types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.

Phone Link Label Enter the label to be displayed for the phone link on the Student Center page.

Display E-mail Select this check box to display the students email address on the Student Center page.

Type Enter email types to display. Only email types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.

Email Link Label Enter the label to be displayed for the email link on the Student Center page.

Privacy settings link If you do not use FERPA, enter a URL to your institution's privacy site. When you enter a URL in this field (starting with http://) a Privacy Settings hyperlink displays on the self-service Student Center page and will direct your users to the website you defined.

If your institution uses FERPA, leave this field blank and just give your self-service users access to the FERPA self-service page. In this case the users access FERPA from the Personal Information prompt by selecting the Privacy Settings option.

Admissions Section

Display Action Column Select this check box to display the Action column in the Admissions section on the Student Center page. The Action column can display the What's missing link and the Accept/Decline link.

Display what's missing link Select this check box to display the What's missing link, which takes users to the to do list.

Display Accept or Decline link Select this check box to display the Accept/Decline link, which takes users to the Accept Admissions page.

Holds Section

Show <> holds at a time Select the number of holds that you want to display at one time. You can display all or from 1 to 10 holds. The system sorts holds by date on the Student Center page, most current to oldest.

Display monetary value Select this check box to display the monetary value of the holds on the Student Center page.

To Do List Section

Show <> To Do's at a time Select the number of to do items that you want to display at one time. You can display all or from 1 to 10 to do items. The system sorts to do items by earliest due date on the Student Center page.

Advisor Section

Show advisor phone number Select this check box to display the phone number of the student's advisor on the Student Center.

Links Section

Use this group box to define hyperlink sections on the Student Center page. By defining sections and URLs, you can provide links to institution websites such as University Library, Campus Directory, University Home Page, FAFSA, and others. You can define three sections with a maximum of three URLs per section.

Setting Up Self-Service Faculty Center

To set up the faculty center, use the Faculty Center component (SSS_FACCNTR_OPT).

This section provides an overview and discusses how to define self-service Faculty Center options.

Understanding Defining Faculty Center Options

The Faculty Center is a self-service page that provides faculty a single entry point from which to begin navigation to faculty related transactions. Faculty can also view their class schedule from the Faculty Center.

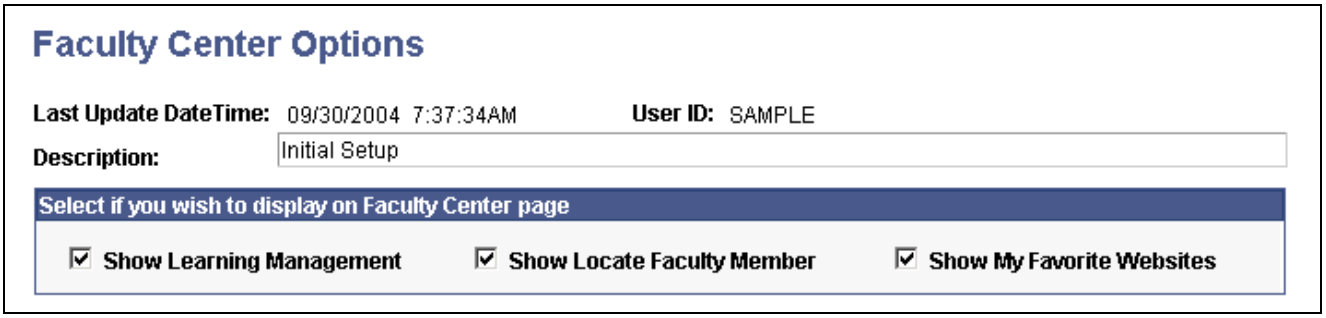
You can configure the Faculty Center to show the Learning Management Systems tab, allow faculty to search for a faculty member from the Faculty Center and enter up to six websites that can then easily be accessed from the Faculty Center page. However, the Faculty Center Options page only configures items displayed on the Faculty Center. Other self-service setup pages could impact your view of the Faculty Center. To maximize the value of Campus Self Service, you should carefully evaluate your self-service needs in relation to all of the self-service setup pages.

Page Used to Define Faculty Center Setup Options

Page Name	Object Name	Navigation	Usage
Faculty Center Options	SSS_FACCTR_OPT	Set Up SACR, Common Definitions, Self Service, Faculty Center	Define whether you want to show the Learning Management Systems tab in the Faculty Center, allow users to search for a faculty member from the Faculty Center and allow faculty members to enter up to six of their favorite websites.

Defining Faculty Center Setup Options

Access the Faculty Center Options page.



Faculty Center Options page

Show Learning Management Select this check box if you want the Learning Management Systems tab to appear in the Faculty Center.

Show Locate Faculty Member Select this check box if you want the Locate Faculty Member button to appear on the Faculty Center page. Instructors will be able to search for another instructor's class schedule.

Show My Favorite Websites Select this check box if you want the My Favorite Websites group box to appear on the Faculty Center page. Instructors can add up to six websites that can then be accessed from the Faculty Center page.

CHAPTER 5

Setting Up Self-Service Student Financials

This chapter discusses how to:

- Set up SF merchants.
- Set up institution sets.
- Set up self service options.
- Set up self service payment messages.

Prerequisites

There are a number of components that need to be set up in order for students make payments through Student Financials self service:

- An SF Institution Set must be assigned to students.
- On all appropriate SF Institution Set parameters, the Accept Self-Service Payments check box must be selected.
- At least one SF Merchant ID must be established per payment type (credit card and/or eCheck) that is to be supported by your institution.
- For each SF Institution Set established, you must create a corresponding SetID and define the corresponding TableSet Control value, particularly for SF11_WEB (Internet Pymnts — INSTITUTION SET)
- SF Business Units must be set up.
- Charge priorities must be established.
- Payment Overall Priorities must be established.
- An SF Term Default must be established.

Setting Up SF Merchants

Setting up SF merchants enables you to set up unique credit card and eCheck processing rules for different departments in your institution.

Setting Up Institution Sets

This section provides an overview of institution sets and discusses how to:

- Define basic institution set parameters.
- Define self service ePayment rules for institution sets.

Understanding Institution Sets

An institution set enables you to define parameters for the PeopleSoft Student Financials self service pages, and for self service ePayment usage for one or more business units in an institution.

Institution sets hide the complexity of multiple business units from the student, and enable students to access information and pay charges toward multiple business units. Institutions with only one business unit can preserve their single-unit character by attaching only one business unit to their institution set.

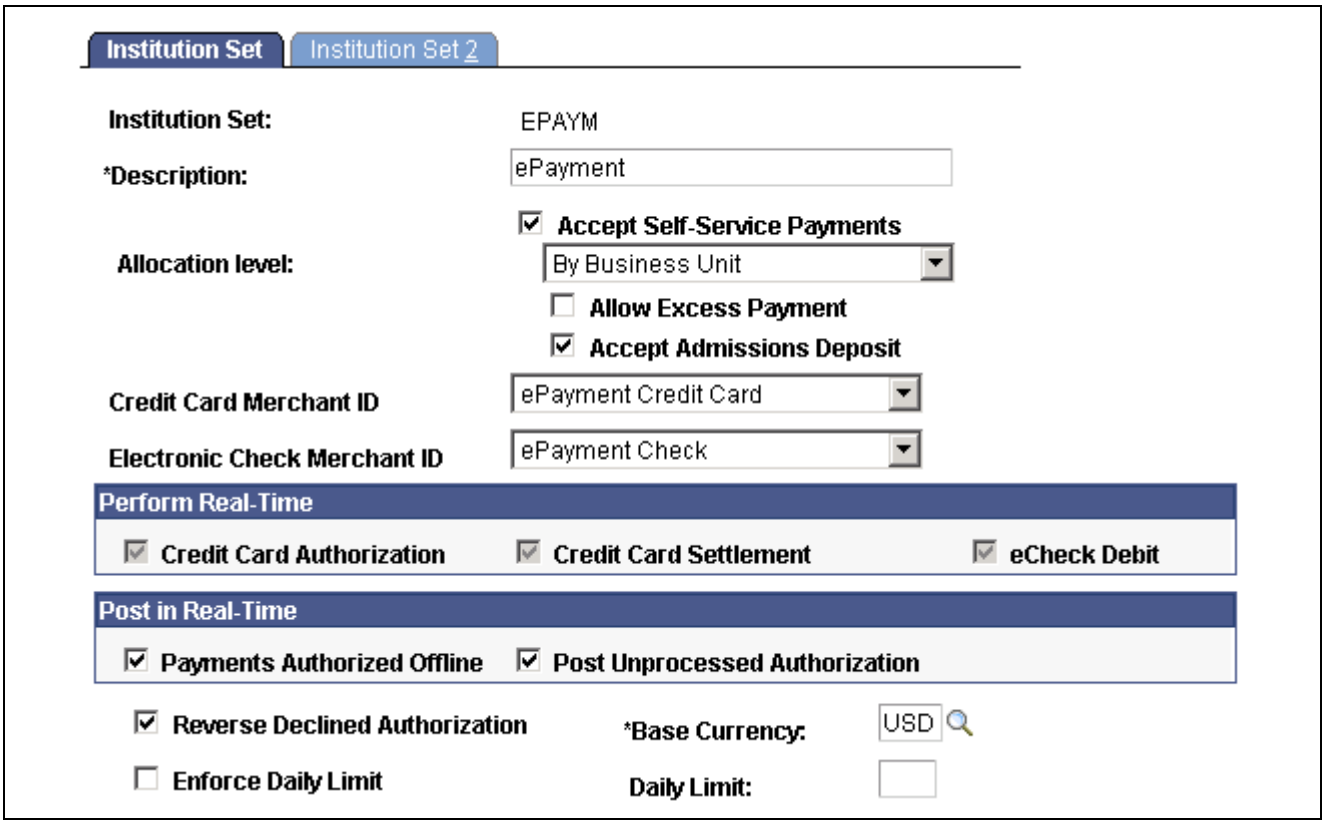
You must set up an institution set and attach it to each student for any self service features to function. You attach the institution set to students through the User Profile process managed by staff using the PeopleSoft Campus Community application.

Pages Used to Set Up Institution Sets

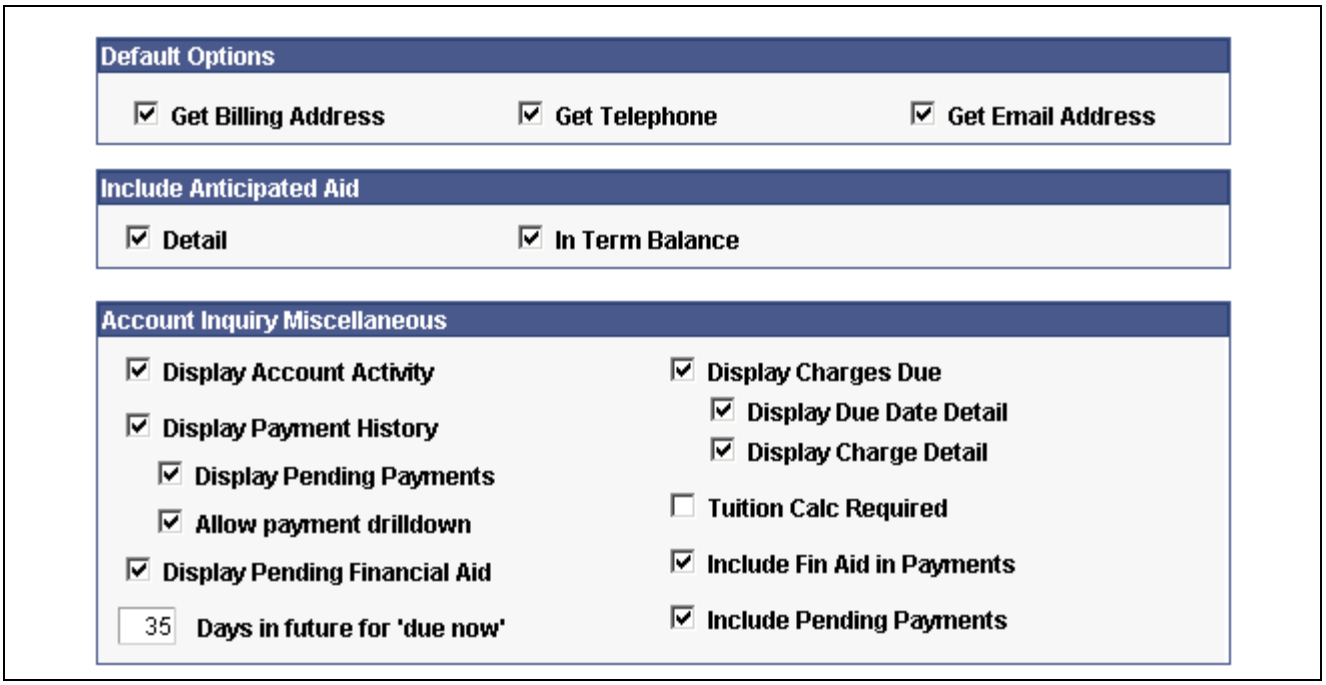
Page Name	Object Name	Navigation	Usage
Institution Set	INSTITUTION_SET_01	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set	Define basic institution set parameters.
Institution Set 2	INSTITUTION_SET_02	Set Up SACR, Common Definitions, Self Service, Student Financials, Institution Set 2	Define business-unit-specific attributes for self service ePayment use for institution sets.

Defining Basic Institution Set Parameters

Access the Institution Set page.



Institution Set page (1 of 2)



Institution Set page (2 of 2)

Description Enter a description of the institution set.

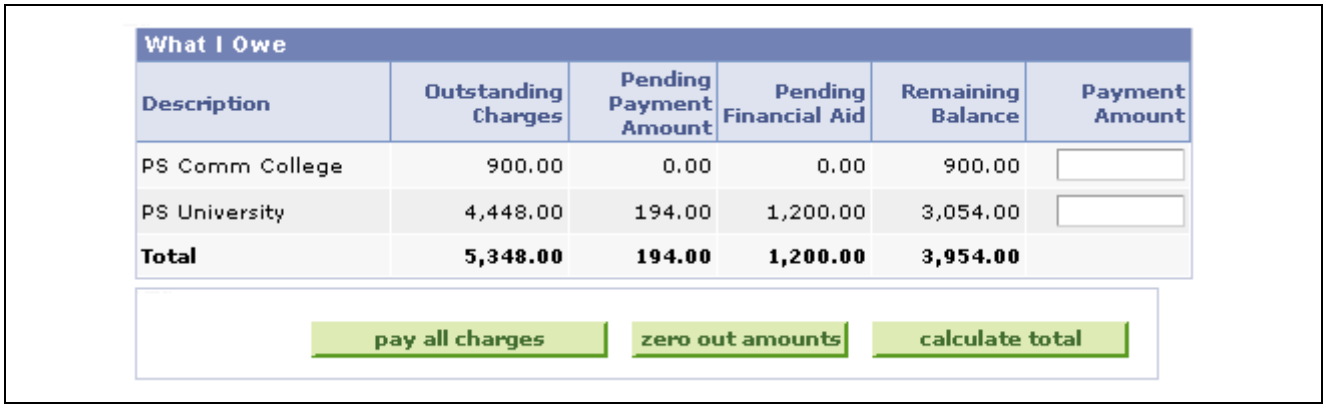
Accept Self Service Payments Select to accept self service payments over the internet. This selection is specific to this institution set, not to the SF business units that are attached on

the Institution Set 2 page. Selecting this option requires that you attach at least one SF business unit that is defined to accept self service payments.

Allocation Level Use the allocation level to define how charges and payments are displayed on a self service page.

Allocation Level By Business Unit

This displays all charges that the student incurred by business unit on the Self Service Make a Payment component. Displaying charges in this manner forces the student to pay all or a portion of her charges by business unit. The Student Financials posting process invokes the appropriate charge priority and payment overall priority rules to the self service payments.

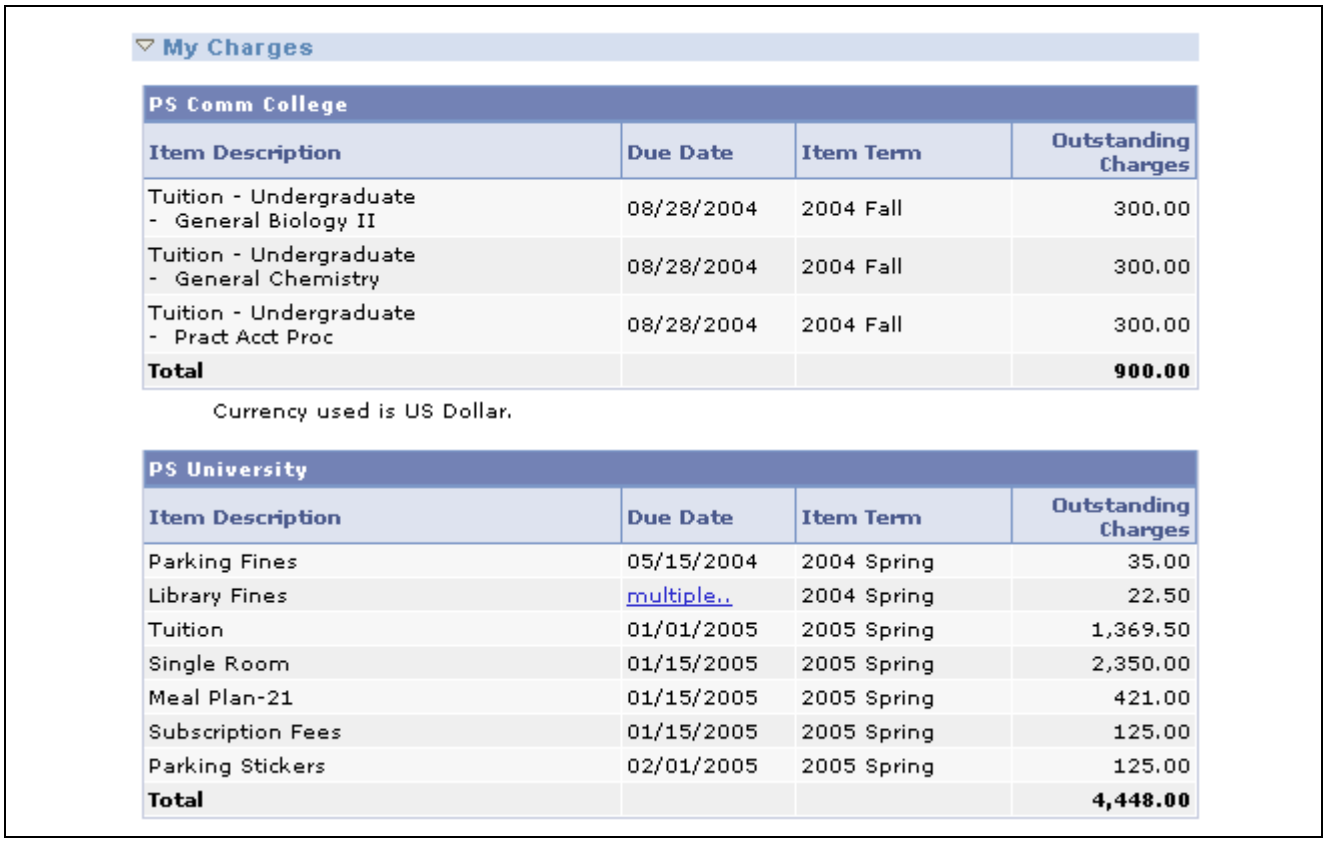


What I Owe

Description	Outstanding Charges	Pending Payment Amount	Pending Financial Aid	Remaining Balance	Payment Amount
PS Comm College	900.00	0.00	0.00	900.00	
PS University	4,448.00	194.00	1,200.00	3,054.00	
Total	**5,348.00**	**194.00**	**1,200.00**	**3,954.00**	

pay all charges | zero out amounts | calculate total

Allocation Level By Business Unit (1 of 2)



My Charges

PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00
Total			**900.00**

Currency used is US Dollar.

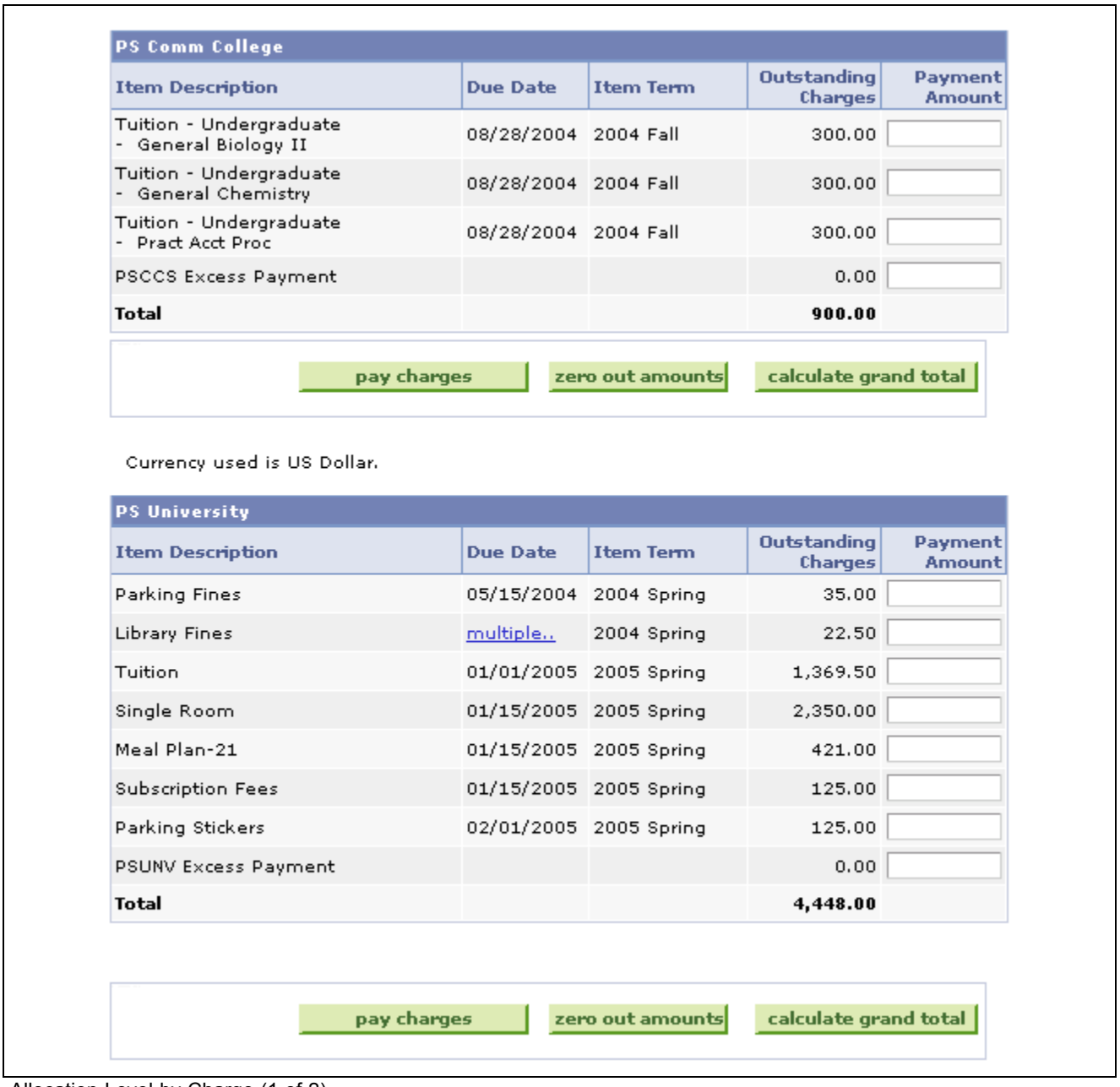
PS University

Item Description	Due Date	Item Term	Outstanding Charges
Parking Fines	05/15/2004	2004 Spring	35.00
Library Fines	multiple..	2004 Spring	22.50
Tuition	01/01/2005	2005 Spring	1,369.50
Single Room	01/15/2005	2005 Spring	2,350.00
Meal Plan-21	01/15/2005	2005 Spring	421.00
Subscription Fees	01/15/2005	2005 Spring	125.00
Parking Stickers	02/01/2005	2005 Spring	125.00
Total			**4,448.00**

Allocation Level By Business Unit (2 of 2)

Allocation Level by Charge

This displays each charge that the student incurred individually by business unit on the Self Service Make a Payment component. Displaying charges in this manner permits the student to pay all or a portion of each charge. The Student Financials posting process bypasses the established charge priority and payment overall priority rules and uses the amounts that the student indicates during the self service transaction. The resulting effect is that the student can pick and choose which charges to pay, thus creating a scenario where older, more pressing charges may be ignored while newer charges can be reduced.



PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges	Payment Amount
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00	
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00	
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00	
PSCCS Excess Payment			0.00	
Total			**900.00**	

pay charges zero out amounts calculate grand total

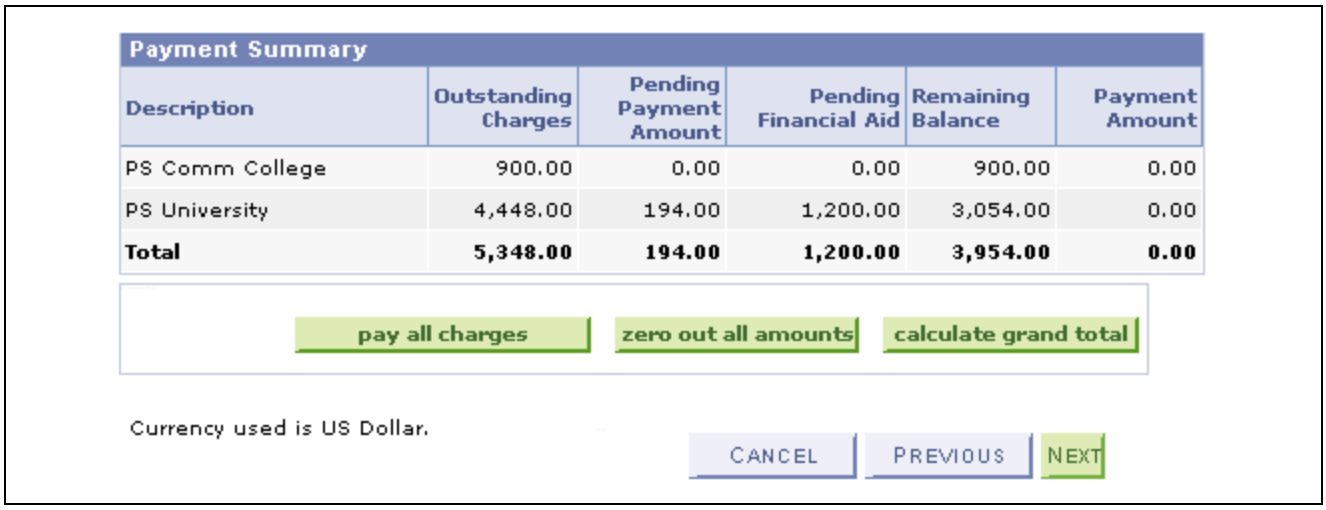
Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges	Payment Amount
Parking Fines	05/15/2004	2004 Spring	35.00	
Library Fines	multiple..	2004 Spring	22.50	
Tuition	01/01/2005	2005 Spring	1,369.50	
Single Room	01/15/2005	2005 Spring	2,350.00	
Meal Plan-21	01/15/2005	2005 Spring	421.00	
Subscription Fees	01/15/2005	2005 Spring	125.00	
Parking Stickers	02/01/2005	2005 Spring	125.00	
PSUNV Excess Payment			0.00	
Total			**4,448.00**	

pay charges zero out amounts calculate grand total

Allocation Level by Charge (1 of 2)

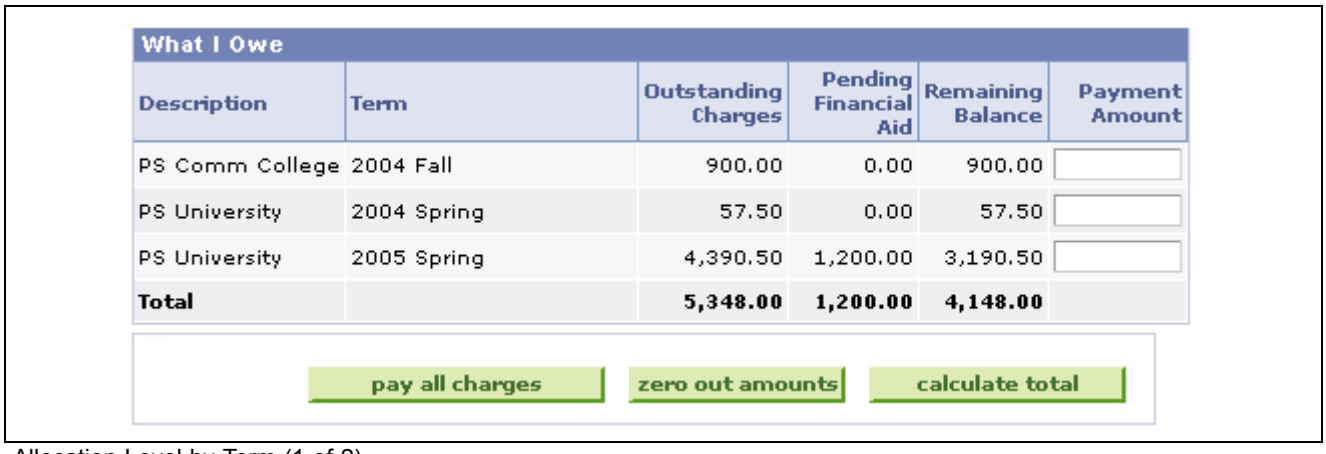


Allocation Level by Charge (2 of 2)

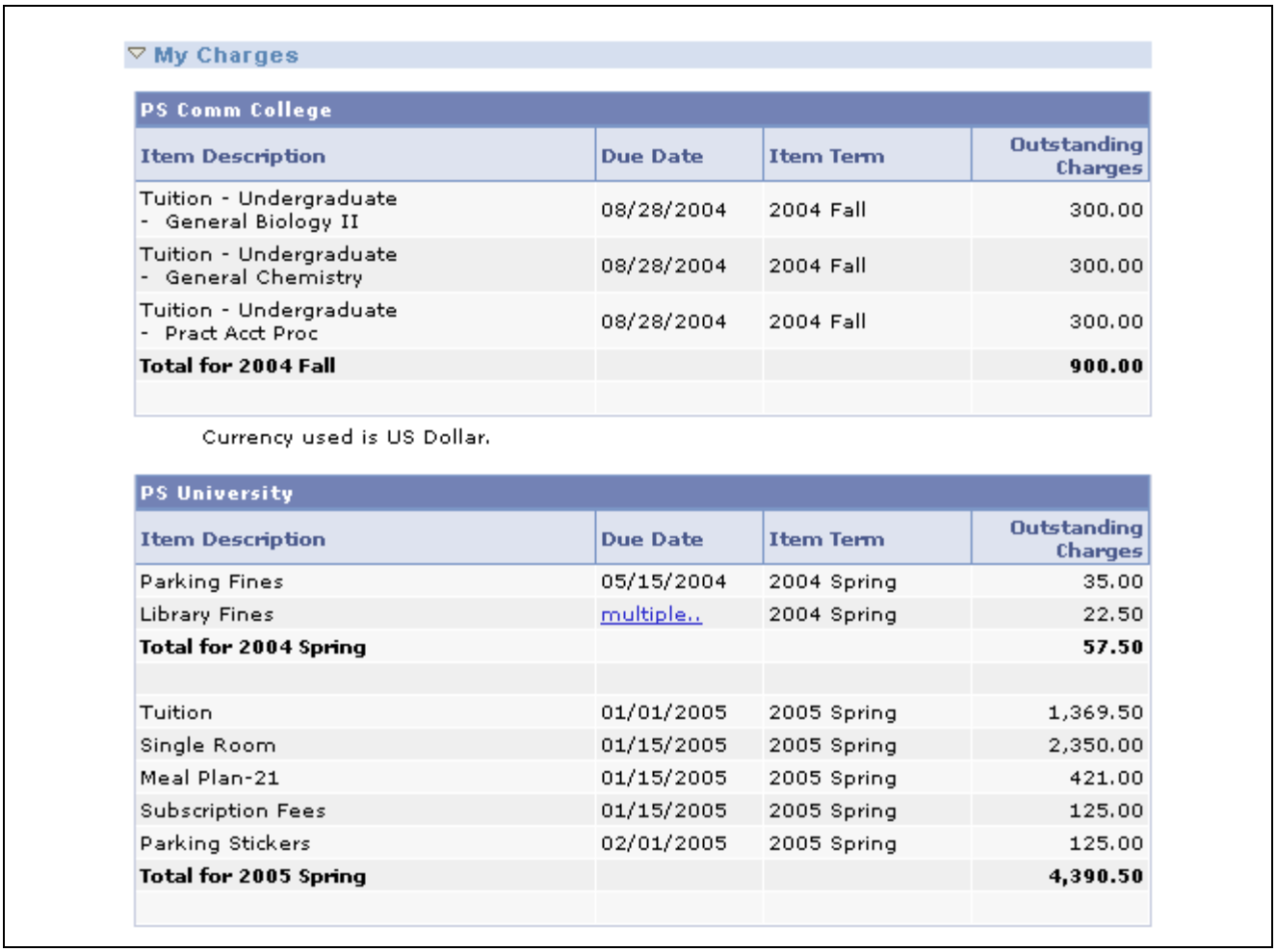
Allocation Level by Term

This displays all charges that the student incurred by term within each business unit on the Self Service Make a Payment component. Displaying charges in this manner permits the student to pay all or a portion of a term's charges—these charges are aggregated by business unit whereby the student cannot pay each individual charge. The Student Financials posting process invokes the appropriate charge priority and payment overall priority rules to the self service payments.

Note. In order for the Allocation Level by Term feature to work, you will need set 'Term, Payment Term First' for Sort 1 of the Charge Sort for Payment Overall Priority attribute for applicable ePayment Item Types.



Allocation Level by Term (1 of 2)



My Charges

PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00
Total for 2004 Fall			**900.00**

Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges
Parking Fines	05/15/2004	2004 Spring	35.00
Library Fines	multiple..	2004 Spring	22.50
Total for 2004 Spring			**57.50**
Tuition	01/01/2005	2005 Spring	1,369.50
Single Room	01/15/2005	2005 Spring	2,350.00
Meal Plan-21	01/15/2005	2005 Spring	421.00
Subscription Fees	01/15/2005	2005 Spring	125.00
Parking Stickers	02/01/2005	2005 Spring	125.00
Total for 2005 Spring			**4,390.50**

Allocation Level by Term (2 of 2)

Allow Excess Payment Select to allow students to make ePayments in excess of their balance due.

Accept Admissions Deposit Select to accept payment for admissions deposits by credit card over the internet. The application center does not accept payment by eCheck.

Credit Card Merchant ID and **Electronic Check Merchant ID** Select a credit card SF merchant ID, an eCheck SF merchant ID, or both for an institution set. This determines which payment type is supported for this institution set: credit card only, eCheck only, or both.

If you select a value in both theCredit Card Merchant ID and an Electronic Check Merchant ID fields, the Select Payment Method page prompts students to select one of two payment types from the drop down list: *Pay by Credit Card* or *Pay by Electronic Check*, before they are permitted to enter self service payment information. If you select a value in only one of these two fields, then the system takes students directly to the Make a Payment — Specify Payment Details page because there is only one valid tender option for self service payment.

Note. Depending on the charge priority rules assigned to the ePayment item type, the student may not be presented with all charges to pay – she will only be presented those charges that are a part of the charge priority list that is associated with the ePayment credit card or eCheck item type.

Perform Real-Time

This group box displays setup options from the SF merchant IDs you select in the Credit Card Merchant ID and Electronic Check Merchant ID fields. These options are for your information only and cannot be changed on this page. Make sure to confirm the accuracy of the information in this group box before proceeding to set up your institution set.

Post in Real-Time

Set the parameters for the real-time posting of credit card transactions.

Payments Authorized Offline — Select to post transactions in real time, even though you authorize the transactions through a batch process. This field is available only if you do not select the Credit Card Authorization option on the SF Merchants page.

Post Unprocessed Authorization — Select to post credit card transactions that fail while performing real-time authorization due to a connection problem. If you clear this check box, the system only posts transactions with fully processed authorizations.

Note. Consider the implications if transactions posted in real-time fail authorization when processed at a later point in time (such as payment reversals and discharge of service indicators).

Reverse Declined Authorization — Select to automatically reverse a posted transaction when a credit card transaction is declined. This option should always be selected if you choose to post transactions with payments authorized offline (see above).

Base Currency — Select the type of currency that you want to use for your credit card transactions. The default value for this field is determined by your selection of a base currency from SF Installation setup.

Enforce Daily Limit and **Daily Limit** — Select the Enforce Daily Limit check box to limit the number of self service payments a student can make per day to the value you enter in the Daily Limit field. For example, if you set up and institution set with both a Credit Card Merchant ID and an Electronic Check Merchant ID, and enter a daily limit of *4*, this mean that a student can make any combination of eCheck and credit card transactions up to a maximum of 4 total transactions per day.

If a student exceeds the limit, the system prevents them from making additional self service payments until the following day.

Default Options

Get Billing Address — Select to make the address fields on the Make a Payment — Specify Payment Details page available for input.

Get Telephone — Select to make the telephone field on the Make a Payment — Specify Payment Details page available for input.

Get Email Address — Select to make the email field on the Make a Payment — Specify Payment Details page available for input.

Include Anticipated Aid

Detail — Select to display anticipated aid as a line item on the Account Summary — What I Owe table and Make a Payment — Specify Payment Amount pages.

Note. With this check box selected, anticipated aid appears on the pages as a line item only and does not reduce the remaining balance amount. Students are informed of any anticipated aid, but their total charges are not reduced by the anticipated aid.

In Term Balance Select to use anticipated aid to reduce the Remaining Balance amounts on Account Summary — What I Owe table and Make a Payment — Specify Payment Amount pages. This check box must be used in conjunction with the Detail check box in order for the Remaining Balance amount to be reduced by anticipated aid. With this check box selected, students' total charges are reduced and they are informed of any anticipated aid.

Account Inquiry Miscellaneous

Your selections here determine what students see in the account inquiry self service component. For instance, if you clear the Display Account Activity check box, students will not see the activity page. Check boxes that are indented below a check box refer to more specific options related to the display feature on that page.

Display Account Activity Select to display the account activity page, including charges, payments, financial aid, and refunds for the student. The activity is controlled by filter options on the activity page – the default number of months being displayed is 6 months of activity.

Display Charges Due Select to display the charges due page. There are three tables displayed on this page, two of which are optional, namely the Display Due Date Detail table and the Display Charge Detail table.

The first table rolls up all charges by unique due date to be presented as a summary to the student.

The Display Due Date Detail table displays the details of all charges rolled up by unique due date.

The Display Charge Detail table displays the details of each charge. On this table, the student has the opportunity to drill down on charges containing multiple due dates.

Display Payment History Select to display the payments page. You can also decide to Display Pending Payments or Allow Payment Drilldown.

If a self service transaction has not be posted to the student's account, the student can see those Pending Payments on the Account Inquiry — Payment History and the Make a Payment — Specify Payment Amount pages if the Display Pending Payments check box is selected.

For any successfully posted payments, the student can see which charges were reduced by those payments if the Allow Payment Drilldown check box is selected.

Display Pending Financial Aid Select to display pending financial aid page. If the student has any anticipated aid that has not been posted to her account yet, it will be displayed on this page.

Days in future for 'due now' Based on the number of days you enter here, it will control the Due Now and Future Due dollar amounts displayed on the Student Center as well as on the Account Inquiry – Account Summary page. The formula used to calculate the 'Due Now' amount is any charges incurred through today *plus* the number of

days specified here. The formula used to calculate the 'Future Due' amount is any charges incurred after today's date *plus* the number of days specified here. Any charges incurred through the current date plus the number of future days entered here controls both the amount due now and the future due amount. Enter the number of future days.

Note. See the example below for more information.

Tuition Calc Required (tuition calculation required)

Select to calculate tuition when a student inquires on their account using the Account Summary or Due Charges self service pages. The system calculates tuition only if required (Calc Required flag set to *Y* on the STDNT_CAR_TERM table).

If this option is not selected and the Calc Required flag is set to *Y*, a message is displayed on the Total Due Charges page indicating that total due charges may not reflect recent changes to your tuition and fees for a given term.

Consider this option carefully. Requiring tuition calculation uses a great deal of your system's processing resources, but account balances might not otherwise reflect recent changes.

Include Fin Aid in Payments (include financial aid in payments)

Select to include financial aid disbursements with all other payments. If this option is clear, financial aid disbursements appear in a separate Financial Aid activity line on the Payment History page. If your institution does not disburse financial aid, select this option to eliminate financial aid activity lines.

Include Pending Payments

Select to reflect that self service electronic payments that have not been posted (pending) reduces the Remaining Balance Amount on the Account Summary — What I Owe table and Make a Payment — Specify Payment Amount pages.

Example of How the Days in Future Field is Calculated

The following table is an example of how charges and payments are displayed, based on what you define in the Days in future for 'due now' field:

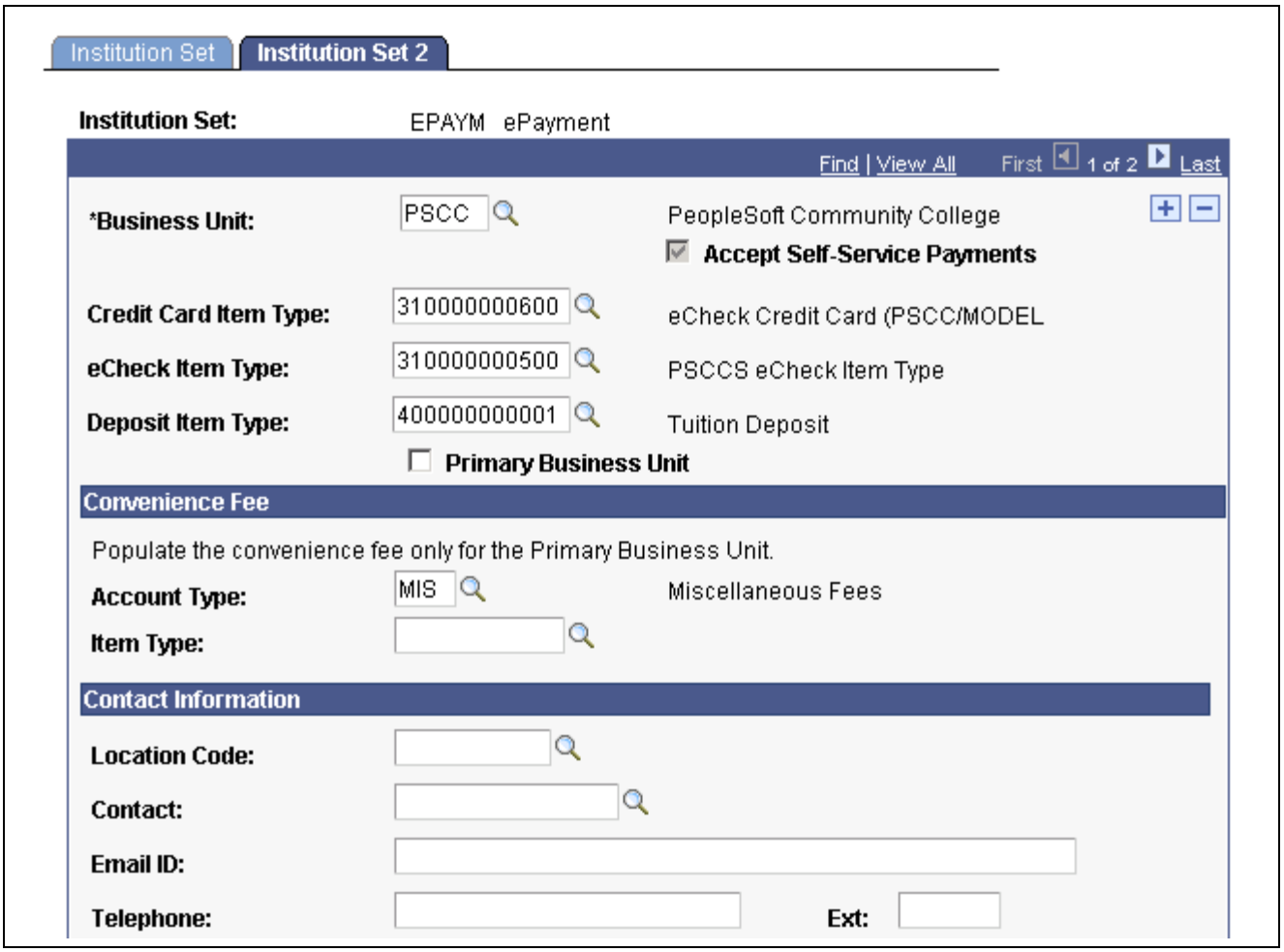
Charge	Date Incurred	Amount
Tuition	July 1, 2004	1000.00 USD
Fee	September 5, 2004	50.00 USD
Room	November 1, 2004	500.00 USD

If the current date is September 1, 2004, and you enter 35 in the Days in future for 'due now' field, then the due now charges will equal 1050.00 USD and the future due will equal 500.00 USD.

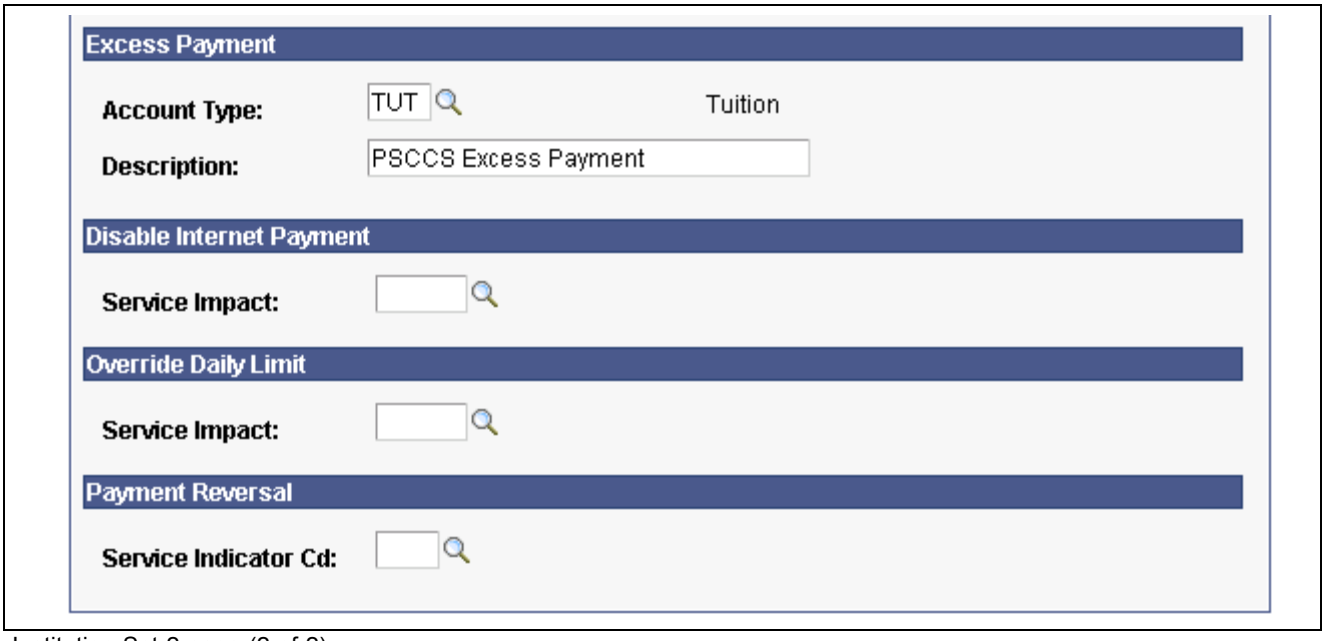
If the current date is October 1, 2004, and you enter 35 in the Days in future for 'due now'field, then the charges due now will equal 1550.00 USD, and the future charges will equal zero.

Defining Self Service ePayment Use for Institution Sets

Access the Institution Set 2 page.



Institution Set 2 page (1 of 2)



Institution Set 2 page (2 of 2)

Note. Most of the fields on the Institution Set 2 page are specific to each business unit in the institution set, not to the institution set as a whole. If you have multiple business units associated with the institution set, be sure to insert a row and enter the information on the Institution Set 2 page for each business unit. Also, if you have more than one business unit associated with your institution set, you must enter a priority ranking for each (see below). The exceptions to this are the service impact and service indicator codes, which are institution-set-specific, not business-unit-specific.

To control what charges the student can pay towards in self service, you must ensure that the item type contains the correct charge priority list. The charge priority list that you assign to the eCheck item type can differ from the credit card item type. In this way, you can control whether or not particular charges can be paid by one payment method versus another. Be sure to specify the correct tender category (eCheck or credit card) on the item type so that it is available to select here.

Business Unit Enter the business unit that you want to be included in this institution set.

Accept Self Service Payments This is a display-only field that shows if Accept Self Service Payments has been selected in the SF Business Unit setup. This means that web credit card payments are authorized for this business unit.

Credit Card Item Type Enter the item type that the system uses for self service credit card transactions entered for this institution set.

Note. The payment item type you select must specify credit card as a tender type.

eCheck Item Type Enter the item type that the system uses for self service eCheck transactions entered for this institution set.

Note. The payment item type you select must specify electronic check as a tender type.

Deposit Item Type If you are accepting web credit card payments for admission deposits, select the item type defined for admission deposits.

Primary Business Unit Select to designate the business unit as the one to which the system assigns ePayment transaction surcharges.

Note. You can designate only one business unit per institution set as the primary business unit.

Convenience Fee

Account Type If you are charging a convenience fee on credit card transactions, select the account to which the system posts charges resulting from a credit card transaction convenience fee.

Note. If you are charging a convenience fee, the payment item type used for credit card transactions must include the account type of your convenience fee item type on the account type page.

Item Type If you are charging a convenience fee on credit card transactions, select the item type that the system uses when posting charges resulting from a credit card transaction convenience fee.

Note. If you are charging a convenience fee, the item type specified here must be included in one of the Allowable Charges tree nodes in the charge priority list used by the credit card payment item type. This charge priority list is specified on the item type miscellaneous page.

Contact Information

Location Code Select a location code to display a remittance address on the Account Summary and Total Due Charges pages.

Contact Select the ID of the individual assigned to be the contact person in the event of web credit card transaction problems.

Email ID Enter the email address of the contact person.

Telephone Enter the telephone number of the contact person.

Ext (extension) Enter the telephone extension of the contact person (if applicable).

Excess Payment

If you select the Allow Excess Payments check box on the Institution Set page, all fields this group box are required.

Account Type Select the account to which the system posts credit card payments in excess of customer balances. If it is different, this selection overrides the Payment Excess Account that you select in the Posting Setup 1 page of the SF Business Unit component.

Description Enter the label you want to display for excess payments. This description overrides the description of the credit card payment item type and appears on the Allocate Payment page in the Future Charges section.

Disable Internet Payment Group Box

Service Impact Select the negative service impact code that the system uses to disable a customer's ability to pay on the internet using a credit card. If the student has this impact on their account, they will be unable to access the Make a Payment page.

Override Daily Limit Group Box

Service Impact Select the positive service impact code that the system uses to enable customers to bypass the daily limit for credit card payments. If a student has this impact on their account, they will be able to make credit card payments in excess of the daily limit.

Payment Reversal Group Box

Service Indicator Select the negative service indicator code that the system attaches to student records when transaction authorizations fail and payments are reversed.

Setting Up Self Service Options

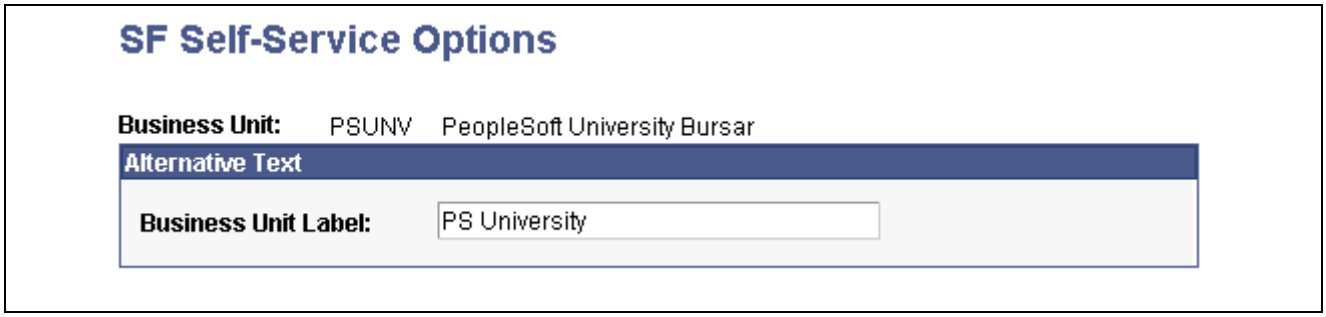
This section discusses how to define self service options.

Page Used to Set Up Self Service Options

Page Name	Object Name	Navigation	Usage
SF Self Service Options	SS_SF_OPTIONS	Set Up SACR, Common Definitions, Self Service, Student Financials, SF Self Service Options	Define business unit labels for self service payment pages. The values you enter here are used in the View By drop downs and in grids on self service pages.

Defining Business Unit Labels

Access the SF Self Service Options page.



SF Self Service Options page

Business Unit Label Enter the label that appears on all self service pages that reference the business unit: table headings, filters, column headings, etc.

Setting Up Self Service Payment Messages

Self-service payment messages display to the student when an error is encountered when processing an ePayment transaction.

CHAPTER 6

Setting Up Self Service for Financial Aid

This chapter provides an overview of the self service application process and discusses how to:

- Set up self service inquiry options.
- Set up self service awarding options.
- Set up self service actions and access in packaging.
- Modify self service loan status descriptions.
- Create user-defined text.

Understanding Self Service for Financial Aid

Financial Aid self service enables students to view financial aid information and take necessary action as may be required or appropriate. Students can accept, decline, and reduce award amounts. They can also request a change to their financial aid, cancel their aid, or request a meeting through the Request Counselor Action feature.

Students can view a summary and detailed information of their financial aid for a specific aid year. They can view their estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need. In addition, students can view the type of award and the offered and accepted amount for each term within the aid year. They can also view their loan application status, loan amount, loan fee, net amount, and scheduled disbursement data.

Setting Up Self Service Inquiry Options

To set up self service options, use the Self Service Options component (SS_FA_INSTALL).

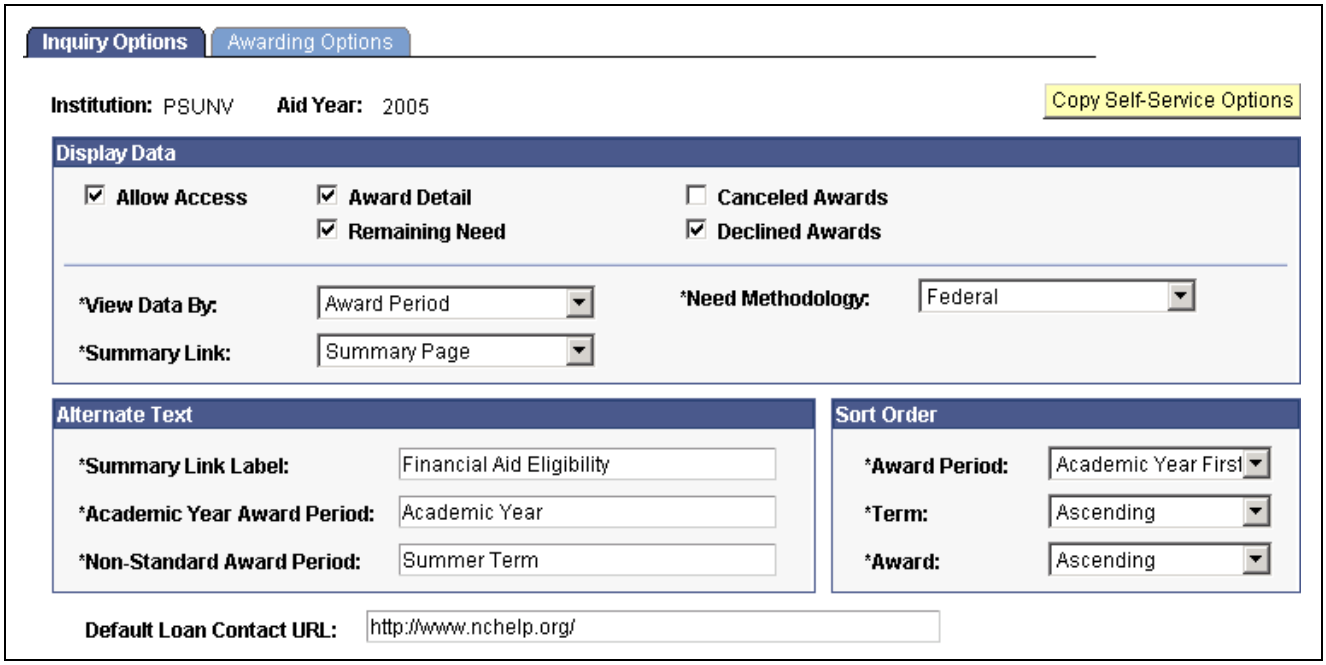
This section discusses how to define self service options.

Page Used to Set Up Self Service Options

Page Name	Object Name	Navigation	Usage
Inquiry Options	SS_FA_INSTALL	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options	Define self service options. Set up information that you want available for students to view.

Defining Self Service Options

Access the Inquiry Options page.



Inquiry Options page

Use this page to define financial aid elements that students can view online.

Display Data

Allow Access

Select this check box to allow students to view and make decisions on their awards for your institution and aid year in self service. If you clear the check box, students cannot access the self service inquiry and award package pages for the corresponding year. For example, if the awards are in transition or not ready for viewing, you can clear the check box to prevent all students from viewing their awards.

Note. Use the Inquiry Access check box and Award Access options field on the Financial Aid Status page to set access at the individual student level. If you clear the Inquiry Access check box, the student does not have access to the inquiry pages. However, if you select the Inquiry Access check box, and as long as you select the Allow Access check box on the Self Service Options page, the student has access to the inquiry pages. Similarly, if you set the Award Access field to Allowed as well as select the Allow Access check box on the Inquiry Options page, the student has access to the self service award pages. The administrative user can set these fields in batch.

Award Detail

If you select this check box, the system displays the Financial Aid Award Summary page. If you clear the check box, the student sees the Financial Aid - Self Service Links page.

Remaining Need

If you select this check box, the system displays the student's remaining need on the Financial Aid - Financial Aid Eligibility page.

Canceled Awards If you select this check box and the student has a canceled award, the system activates the View Canceled Awards link on the Financial Aid - Award Summary page.

Declined Awards If you select this check box and the student has a declined award, the system activates the View Declined Awards link on the Financial Aid - Award Summary page

View Data By Select from:

Aid Year: Displays the entire aid year across award periods.

Award Period: Displays aid year information by the award period for academic and non-standard periods.

Summary Link Provides access to view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, or user-defined text.

Select from:

COA Detail Only: Displays estimated financial aid budget detail.

Do Not Show Link: Does not display link.

Summary Page: Displays the Financial Aid – Financial Aid Eligibility page. Students can view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, and user-defined text.

User-defined Page: Displays user-defined text.

Need Methodology Select from:

Federal: Displays estimated financial aid budget and expected family contribution (EFC) values based on federal methodology.

Institutional: Displays estimated financial aid budget and EFC values based on institutional methodology.

Alternate Text

Summary Link Label Enter a name for this link. The text you enter here is the name of the link that appears on the Financial Aid - Award Summary page and the title of the Financial Aid - Aid Year Summary page.

Academic Year Award Period Enter text such as Academic Year 2005. The system displays this text when referring to this specific award period on self service pages such as on the Financial Aid — Award Summary and Financial Aid - Expected Family Contribution pages.

Non-Standard Award Period Enter text such as Summer. The system displays this text when referring to this specific award period on self service pages such as on the Financial Aid - Expected Family Contribution page.

Sort Order

Award Period

Note. The system only displays this field if you set the View Data By field to Award Period.

Select from:

Academic Year First: Displays academic year data first and then non-standard period data.

Earliest Period First: Displays the award period into which the student's earliest term falls. For example, if a student has awards for both Summer 2004 (non-standard) and Fall 2004 (academic year), and these terms are part of the same aid year, then the non-standard period is displayed first.

Latest Period First: Displays the award period into which the student's most recent term falls. For example, if a student has awards for both Summer 2004 (non-standard period) and Fall 2004 (academic year), and these terms are part of the same aid year, then the academic year period is displayed first.

Non-standard Period First: Displays the non-standard period first.

Note. If the student has awards in only one award period, the system displays whichever award period contains awards. If the student has awards in both periods, the system uses the Award Period sorting option to determine which period to display first.

Term

Select from:

Ascending: Sorts from lowest Term ID to highest and therefore, displays the most recent term last.

Descending: Sorts from highest Term ID to lowest and therefore, displays the most recent term first.

Award

The system sorts awards by item type. Select from the following financial aid item type sequence:

Ascending: 9..100 first, 9..322 last.

Descending: 9..322 first, 9..100 last.

Default Loan Contact URL:

Enter a URL to enable students to access more detail about their specific loan information. Currently only one URL for an institution is available in the system. You may want to provide a URL that links students to an external loan servicer for which you have established a relationship or to an already existing intranet loan page. This link is available only if the loan has been originated in the system. The URL appears on the Financial Aid - Loan Application Information page.

Copy Self Service Options

Click to copy financial aid self service options from this institution and aid year to another.

Setting Up Self Service Awarding Options

To set up self service awarding options, use the Self Service Options component (SS_FA_INSTALL).

This section discusses how to set up self service awarding.

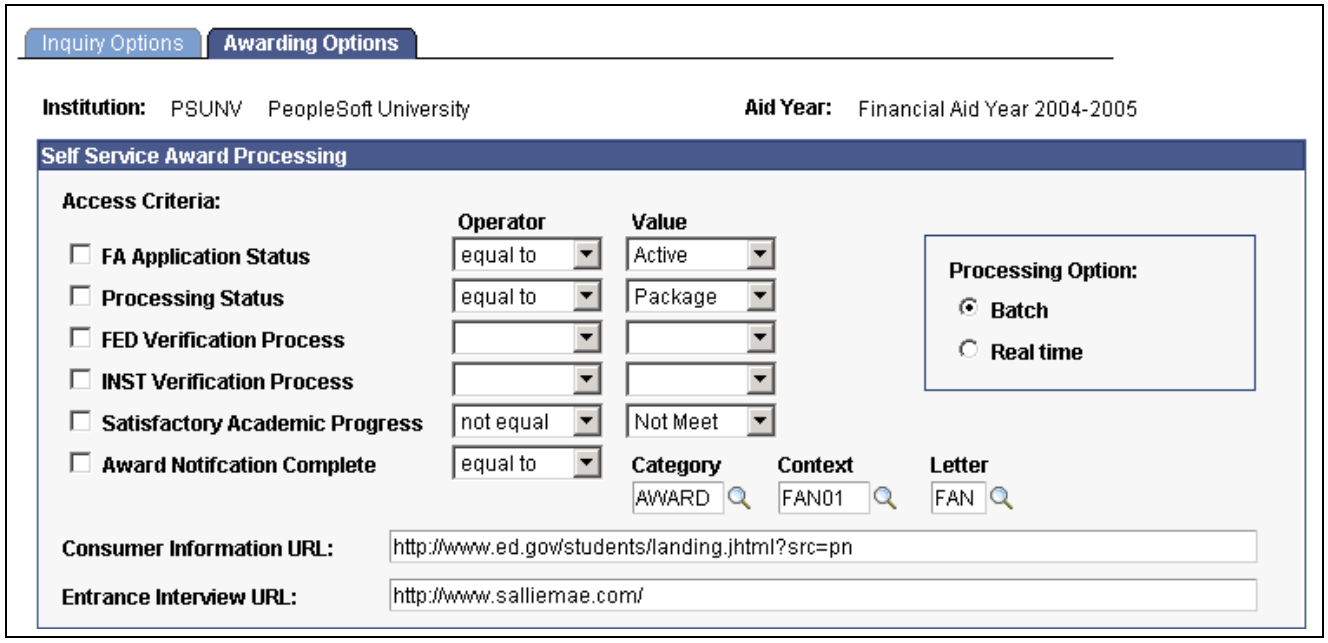
Page Used to Set Up Self Service Awarding

Page Name	Object Name	Navigation	Usage
Awarding Options	SS_FA_INSTALL2	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options	Define filter options for self service awarding access criteria, set up processing options, and set up Consumer and Entrance Interview URLs.

Setting Up Self Service Awarding

This section discusses how to define access criteria, the different processing options, and the site-definable URLs for self service awarding.

Access the Awarding Options page.



Awarding Options page

Self Service Award Processing

The system provides a number of ways for the institution to control when a student gains access to the self service awarding page. One option to control access is through the use of filtering. If you do not select the check box, then the system does not consider it as part of the access criteria.

Access Criteria

FA Application Status Select to allow self service awarding access based on the student having an active financial aid application.

Operator Select from the following for FA Application Status:

equal to

not equal

Value Values for FA Application Status:

	Active *Canceled* *Restricted*
Processing Status	Select to allow self service awarding access based on the student's processing status.
Operator	Select one of the following for Processing Status: *equal to* *not equal*
Value	Values for Processing Status are: *Applied* *Completed* *No App Rcd* *Package* *Review*
FED Verification Process	Select to allow self service awarding access based on the student's federal verification status.
Operator	Select one of the following for FED Verification Process: *equal to* *not equal*
Value	Values for FED Verification Process are: *Complete* *Not Reqd* *Pending* *Required*
INST Verification Process	Select to allow self service awarding access based on the student's institutional verification status.
Operator	Select from the following for INST Verification Process: *equal to* *not equal*
Value	Values for INST Verification Process are: *Complete* *Incomplete*
Satisfactory Academic	Select to allow self service awarding access based on the student having met your institution's criteria for satisfactory academic progress.
Operator	Select one of the following for Satisfactory Academic Progress: *equal to*

not equal

Value Values for Satisfactory Academic Progress are:

Meets SAP

Not Meet

Probation

Undetrmine

Award Notification Complete Select this check box to allow self service awarding access based on whether a financial aid award notification letter has been generated for the student.

Category Select an option:

Appeal (FA Appeals)

Award (Financial Aid Award Notification

SAT (Satisfactory Academic Progress Letters

SCHLRS (Scholarship Communications)

VERF (Verification Processing)

Context Select a type of communication. The system uses the same criteria when generating the FAN letter.

Letter Select a type of communication. They system uses the same criteria when generating the FAN letter.

Note. You use these criteria options in conjunction with the *Use Filter* award access option on the Packaging Status Summary page.

Processing Option This option controls whether students' decisions regarding their awards will be processed in real time or in batch. If you select the default value of *Batch*, the system loads the current award package from the real tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system sets the student's transaction to Pending Update and records the current date and time. When you run the batch process, the system selects all transactions with a Pending Update status for processing. For each student selected, as long as the financial aid package has not been revised since the student submitted the award acknowledgment, the system checks each award in the student's package for any changes. It evaluates changed awards to ensure that award amounts and disbursement balances are correct and reductions do not fall below minimum amounts. The system processes all other awards in passive mode. After the batch validation process has completed, and if no errors were found, the system posts the data to the student's real award tables in the database.

If you select *Real time,* the system loads the current award package from the real award tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system evaluates the award activity and the resulting changes as it does in batch mode. The process verifies the Accept or Decline amount, and for award reductions, recalculates the scheduled disbursements. When all of the awards in the student's package are processed, and if no errors were found, the system posts the data to the student's real award tables in the database.

Note. Unlike administrative packaging where the packaging routine performs extensive edits to ensure the validity of an award, in self service the system processes awards in passive mode and does not perform any federal edits or evaluate the student for eligibility or need criteria. The system performs a subset of edits on any award that is being reduced. Also, the system adjusts an award that has been reduced below minimum amounts established for the system.

Consumer Information URL If you populate this field, the system displays a link in self service awarding. If you leave this field blank, the system does not display a link. Enter your institution's student information site. This site may reflect awarding rights and responsibilities such as statement of educational purpose, truth-in-lending content, or other financial aid information.

Entrance Interview URL If you populate this field, the system displays a link in self service awarding. If you leave this blank, the system does not display a link. Enter your institution's entrance and exit interview site.

Setting Up Self Service Actions and Access in Packaging

To set up self service actions and access in packaging, use the Financial Aid Item Types component (FINANCIAL_AID_ITEM). Use the component interface (FINANCIAL_AID_ITEM_CI) to load the data into the tables for these component interfaces.

This section discusses how to:

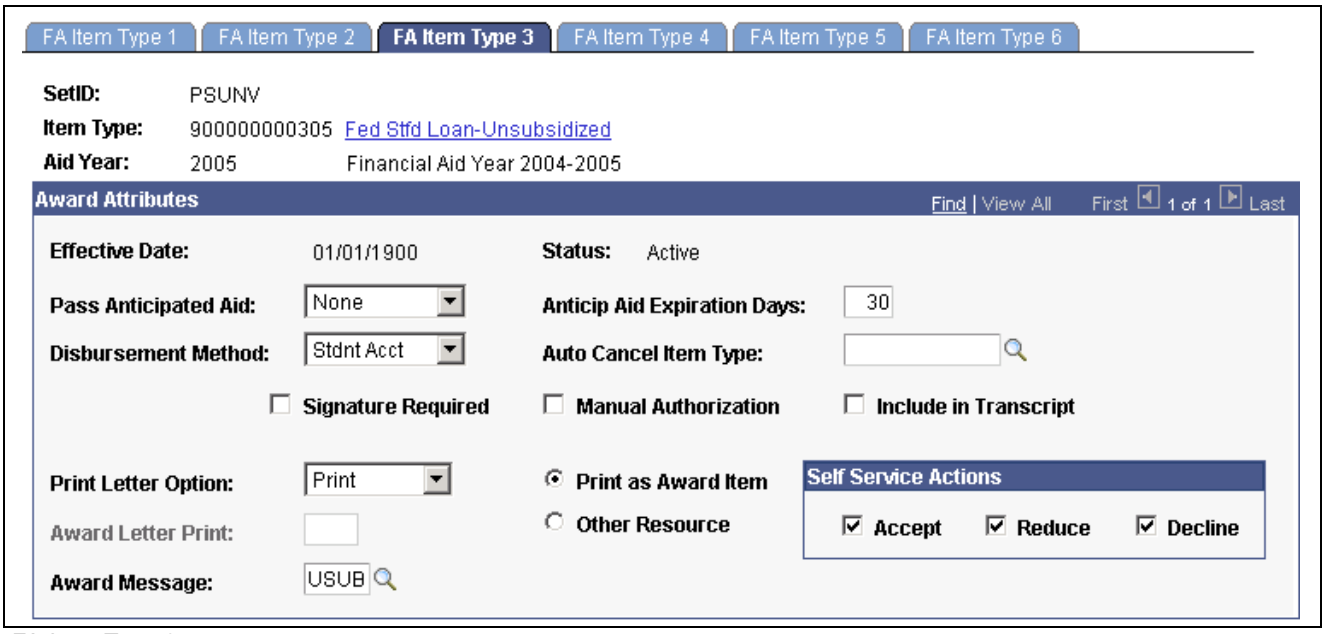
- Define self service actions in packaging.
- Define self service access in packaging.
- Change award and inquiry access.

Pages Used to Define Self Service Actions and Access in Packaging

Page Name	Object Name	Navigation	Usage
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3	Set up disbursement information and self service actions options.
Financial Aid Status	STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Financial Aid Status	Review the student's need, budget, and award or change the student's packaging status. Set the student's self service inquiry and award access.
Self Service Security	SFA_RUNCTL_SS_SEC	Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self Service Security	Set the award and inquiry access value.

Defining Self Service Actions in Packaging

Access the FA Item Type 3 page.



FA Item Type 3 page

The system provides flexibility when controlling whether a student can accept and reduce or decline an award.

The *Accept, Decline,* and *Reduce,* fields are available only if the Print Letter Option is set to *Print.*

Self Service Actions

Accept Select to enable the student to accept a particular award. When you select *Accept*, the *Reduce* and *Decline* options become available.

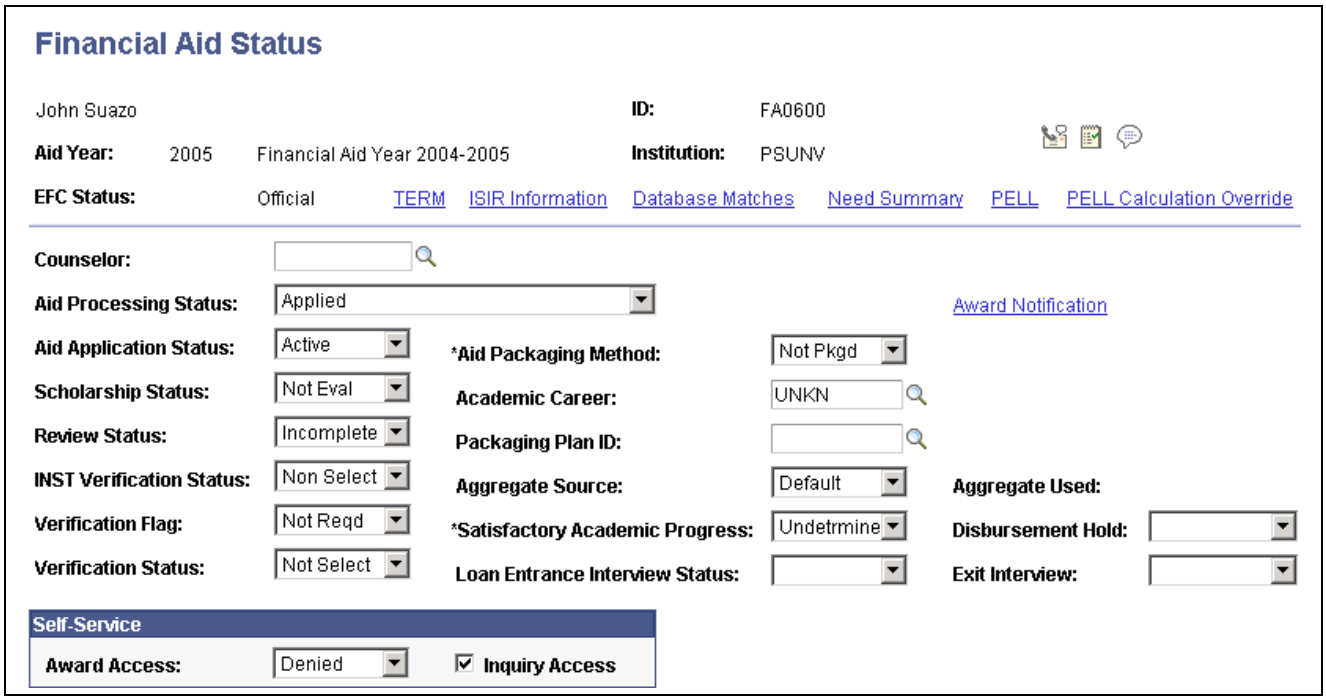
Reduce You must select the *Accept* check box and then the *Reduce* check box to enable the student to reduce a particular award. Clear this check box to prevent students from reducing their awards.

Decline Select this check box to enable the student to decline a particular award. Once a student declines an award, the system sets the Offered and Accept amount fields to 0.00, and the student cannot update the amounts.

Note. If you set the *Print Letter Option* to *Never* or blank, the system displays the award on the Financial Aid – Award Summary page (View My Financial Aid), but not on the Award Package page (Accept/Decline Financial Aid).

Defining Self Service Access in Packaging

Access the Financial Aid Status page.



Financial Aid Status page

Self-Service

These values can be set in batch by generating the Assign Self Service Access process.

Award Access Select one of the following options:

Allowed: If you select this option, the student is permitted access to award acknowledgement for the given year regardless of filtering option criteria established in self service awarding options setup.

Denied: If you select this option, the student does not have access to award acknowledgment for the given year regardless of filtering option criteria established in self service awarding options setup

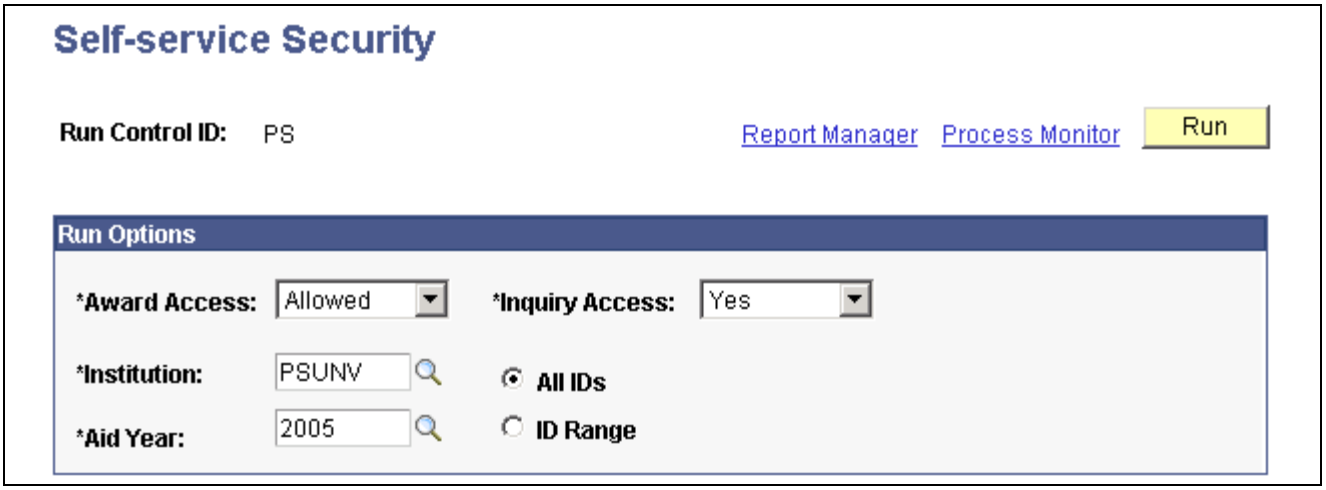
Use Filter: If you select this option, the student must meet the self service awarding options access criteria to gain access to an award acknowledgment in self service awarding.

Inquiry Access Select to allow a student to view assigned financial aid awards.

Note. You must also select the Allow Access check box on the Inquiry Options page in setup to enable self service access.

Changing Award and Inquiry Access

Access the Self-service Security page.



Self-service Security page

Use this page to change the value of the Award Access and Inquiry Access fields on the Financial Aid Status page. This then controls whether or not a student can gain access to either area of self service.

Award Access Select one of the following options:

Allowed

Denied

Use Filter

Inquiry Access Select one of the following options:

Yes

No

Institution Select your institution.

Aid Year Select the aid year for which to run this process.

All IDs Select this option to update or change all IDs.

ID Range Select this option to update or change a range of IDs.

Modifying Self Service Loan Status Descriptions

To set up self service loan status descriptions, use the Self Service Loan Status component (SS_FA_LOAN_STAT).

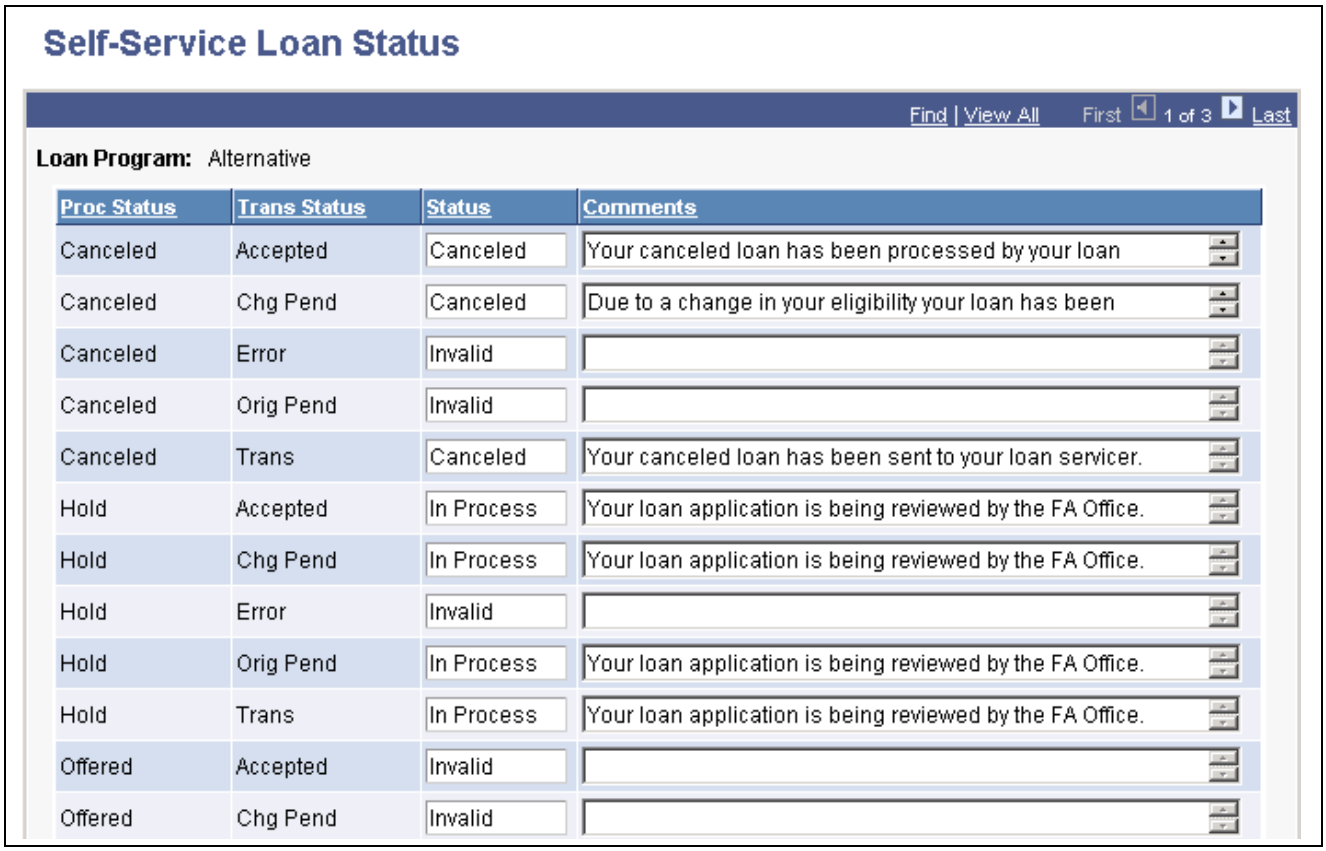
This section discusses how to modify loan status descriptions.

Page Used to Modify Loan Status Description

Page Name	Object Name	Navigation	Usage
Self Service Loan Status	SS_FA_LOAN_STAT	Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Loan Status	Modify loan status descriptions and comments text that you want a student to see online. This page provides students with their loan application status. These values are delivered by PeopleSoft.

Modifying Loan Status Descriptions

Access the Self Service Loan Status page.



Self Service Loan Status page

You can view or modify the status and comments text that you want a student to view online.

Proc Status (processing status) Indicates where the loan application is in the origination process between your institution and the loan servicer.

Trans Status (transaction status) Indicates the current status of the loan application.

Creating User-Defined Text

PeopleSoft Financial Aid provides an area on each of the self service pages for you to add explanatory text. The text resides in the message catalog. The system displays the message number to help you determine the text you want on a page. If you do not want a message on a particular page, you can go to the message catalog and delete the text. You can also delete the message entirely, but we suggest that you only delete the text and not the reference number in case you decide to add text later.

The following are examples of why you would add user-defined text for self service awarding:

- Why disbursed awards cannot be updated.
- Why custom split awards cannot be updated.
- Why subsidized and unsubsidized loans have automatic treatment.
- Why loans in transit cannot be updated.
- General rules of navigation.
- Specifying required instructions such as instructing students not to increase awards.

Message numbers 500 and greater for Message Set “14409” are designated as user-definable. We deliver some message numbers with the message text and explanation already defined. This is done as an example for the type and usage of the message.

CHAPTER 7

Setting Up Recruiting and Admissions Self Service

This chapter provides an overview and discusses how to set up request information for Recruiting and Admissions Self Service.

Understanding Self-Service Request Information

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

Prerequisites

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

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

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

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

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

See Also

Chapter 20, "Using Self-Service Student Admissions," Using Self-Service Request Information, page 187

Setting Up Self-Service Request Information

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

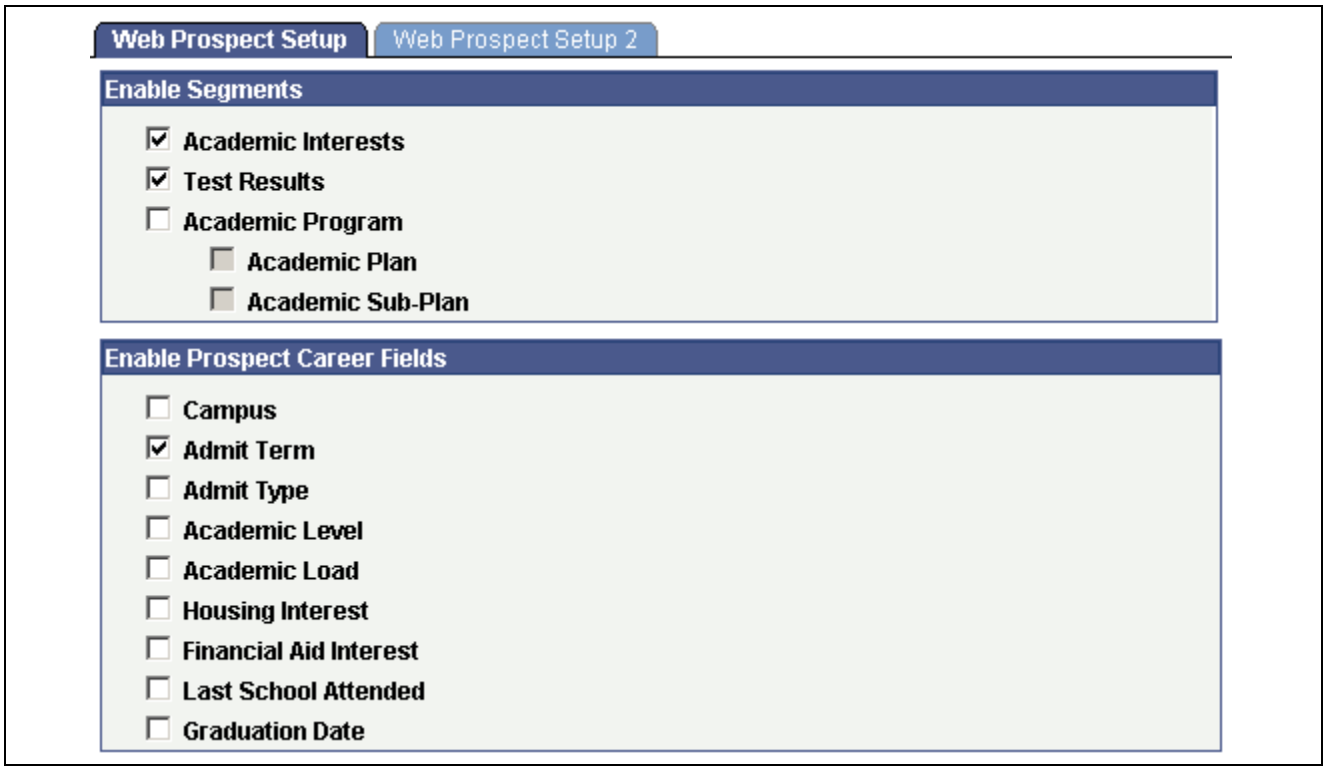
Use the Web Prospect Create Table component to determine which information segments you want to enable in the Request Information self-service transaction and to set up academic institution and career parameters (such as which careers you want available to the visitor, and which recruiting center you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

Pages Used to Set Up Self-Service Request Information

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

Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page.



Web Prospect Setup page

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

Enable Segments

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

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

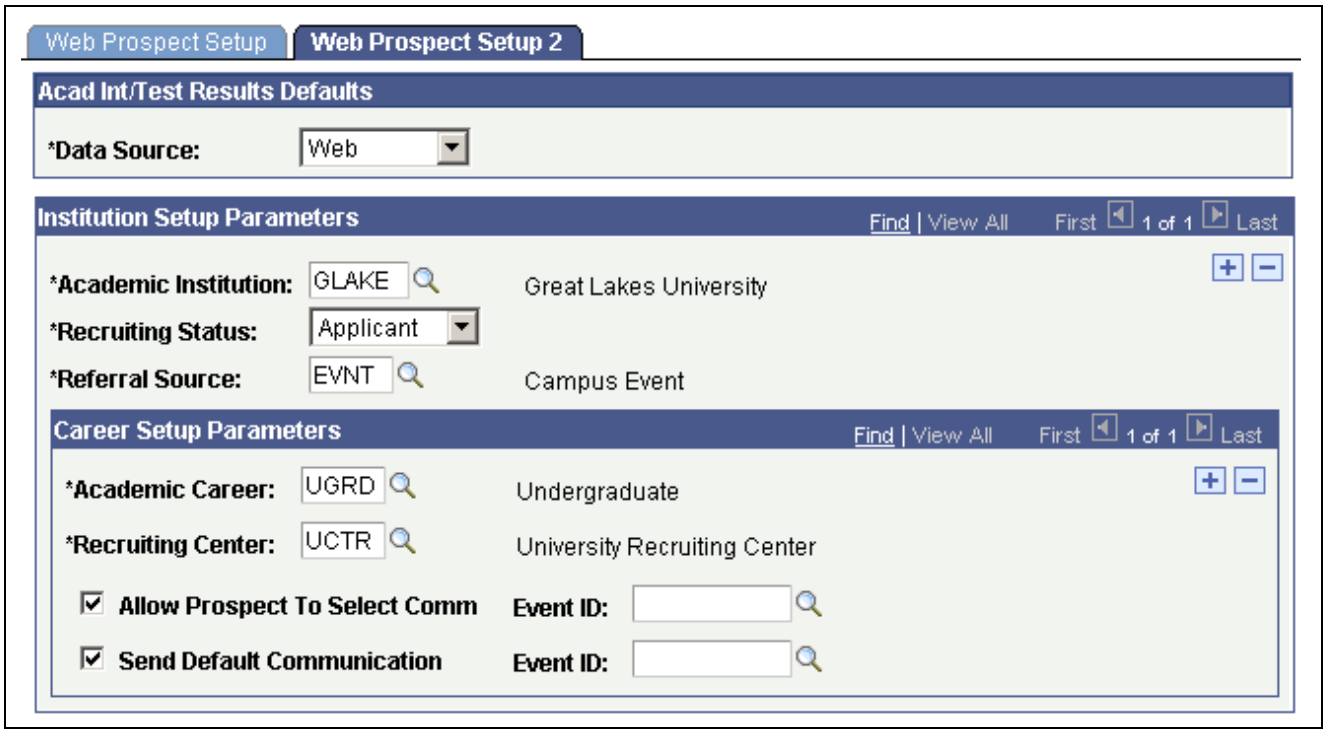
Enable Prospect Career Fields

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

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

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page.



Web Prospect Setup 2 page

Acad Int/Test Results Defaults

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

Institution Setup Parameters

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

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

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

Career Setup Parameters

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

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

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

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

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

CHAPTER 8

Using Self-Service Enrollment

This section discusses how students perform the following self-service tasks:

- View enrollment appointments.
- View your class schedule.
- Use the Wish List.
- Add classes.
- Drop classes.
- Swap classes.
- Edit classes.
- View your weekly schedule.
- View their exam schedule.

Understanding Self-Service Enrollment

The self-service enrollment design integrates the various enrollment functions and enables students to build and make changes to their schedules from the same place in the system. A step by step wizard feature guides students through the enrollment processes of adding, dropping, swapping, and editing classes. Specifically, it guides students through the steps of selecting classes, defining options—such as wait list preferences—confirming selections, and reviewing results.

Additionally, a great degree of integration exists between the tasks of viewing appointment data, finding or browsing for classes, enrolling in classes, presenting error messages, and viewing enrollment information.

Self Service Wish List Validation and Enrollment Messages

We have delivered new error and informational message sets for the Wish List Validation feature and self-service enrollment processing. These new message sets enable the enrollment process to bring back a more self-service friendly message. These messages can be modified to meet the specific needs of your students. You can view and make changes to these messages using the PeopleTools Message Catalog component (PeopleTools, Utilities, Administration, Message Catalog).

Validation (Message Set 14632): These messages are returned when a student selects *Validate* on the Wish List page. The system a validation-specific message–rather than a regular enrollment engine message. For example, if the validation process finds a time conflict, the message 14632, 17–rather than the enrollment engine message 14640, 17–will be returned.

Enrollment (Message Set 14641): This Message Set will be used for all messages received through self-service enrollment (excluding Wish List Validation). While actual enrollment processing will be the same for self-service enrollment as it is when processed using an administrative user page, such as Quick Enroll, the fact that a request was submitted through self-service enrollment is now used to return a self-service specific error or informational message. For example, if an enrollment request submitted though the Quick Enroll component returns message 14640, 17 (time conflict), the same request submitted through self-service will return the self-service specific message 14641,17. This enables more appropriate self-service messaging, without changing the messages used for non-self-service, administrative users.

See Also

Chapter 21, "Using Self-Service Course Catalog and Schedule," Searching for Classes Using Self-Service Pages, page 193

Enterprise PeopleTools PeopleBook: System and Server Administration, "Using PeopleTools Utilities, Using Administration Utilities, Message Catalog"

Prerequisites

You must first define your enrollment feature options and enrollment preference options on the Student Records Setup page.

See Also

Chapter 4, "Setting Up Self-Service Student Records," page 11

Viewing Enrollment Appointments Through Self-Service

This section discusses how students can view their enrollment appointments for a specific term. Advisors can also view information on this page.

Page Used to View Enrollment Appointments

Page Name	Object Name	Navigation	Usage
Enrollment Dates	SSR_SSENRL_APPT	Self Service, Enrollment, View Enrollment Appointment	Students can view detail information about their enrollment appointment, such as start date, end date, start time, end time, and unit limits.

Viewing Your Class Schedule

This section discusses how students view their class schedule from self-service pages.

Pages Used to View Your Class Schedule

Page Name	Object Name	Navigation	Usage
My Class Schedule	SSR_SSENRL_LIST	Self Service, Enrollment	Students use this page to view their class schedules for a term.
Weekly Schedule	SS_WEEKLY_SCHEDULE	• Self Service, Enrollment, My Class Schedule Click the Weekly Calendar View option. • Self Service, Enrollment, View My Weekly Schedule	Students use this page to view their weekly schedules. **Note.** Before students can view their weekly schedules, you must define weekly schedule time periods. See Chapter 4, "Setting Up Self-Service Student Records," Setting Up Weekly Schedule Time Periods, page 16.
Academic Calendar Deadlines	ACAD_CAL_DATES	Click the Academic Calendar Deadlines icon on the My Class Schedule page.	Students use this page to view drop, cancel, and withdrawal deadlines for a class on their class schedule.

Using the Wish List

This section discusses how students can use the self-service Wish List to plan and build their schedules and validate their enrollment selections before their enrollment appointment.

Pages Used to Use the Wish List

Page Name	Object Name	Navigation	Usage
Wish List	SSR_PLANNER_MAIN	Self Service, Enrollment	Students plan and build their schedules for an upcoming term by saving selected classes to a staging area. If you have enabled the Validation feature, students can check their selections for common enrollment errors by validating them against a subset of the current enrollment engine edits.

Adding Classes

This section discusses how students can add classes to their schedules from Campus Self Service.

Pages Used to Add Classes

Page Name	Object Name	Navigation	Usage
Add Classes	SSR_SSENRL_ADD	Self Service, Enrollment	Students can use this page to request enrollment into classes for a term.
Related Class Sections	SSR_CLS_RELCOMP	Click the Next button on the Add page.	Students use this page to select related class sections to add.
Add Classes - Select Classes to Add - Enrollment Preferences	SSR_CLS_DTLOPT	Click the Select a Class button on the Select Classes to Add - Class Detail page.	Students use this page to complete the information for their class enrollment requests.
Add Classes - Confirm Classes	SSR_SSENRL_ADD_C	Click the Next button on the Add Classes - Select Classes to Add - Enrollment Preferences page.	Students use this page to confirm their selection and initiate the enrollment engine.
Add Classes - View Results	SSR_SSENRL_RSLT	Click the Enroll button on the Confirm Classes page.	Students use this page to view the result of their enrollment request.

Dropping Classes

This section discusses how students can drop classes from their schedules through Campus Self Service.

Pages Used to Drop Classes

Page Name	Object Name	Navigation	Usage
Drop Classes	SSR_SSENRL_DROP	Self Service, Enrollment	Students use this page to drop classes from their schedule.
Drop Classes - Confirm Your Selection	SSR_SSENRL_DROP_C	Click the Drop Classes button on the Drop Classes page.	Students use this page to confirm their selection.
Drop Classes - View Results	SSR_SSENRL_RSLT	Click the Next button on the Drop Classes – Confirm Your Selection page.	Students use this page to view the result of their drop request.

Swapping Classes

This section discusses how students can swap classes using self-service pages.

Pages Used to Swap Classes

Page Name	Object Name	Navigation	Usage
Swap	SSR_SSENRL_SWAP	Self Service, Enrollment	Students can use this page to request to swap an existing class enrollment within a term for a different class enrollment.
Select a class to swap - Enrollment Preferences	SSR_CLS_DTLOPT	Click the Select a Class button on the Select Classes to swap - Class Detail page.	Students use this page to complete the information for their class enrollment requests.
Swap Classes - Confirm your selection	SSR_SSENRL_SWAP_C	Click the Next button on the Select a class to swap - Enrollment Preferences page.	Students use this page to confirm their selection and initiate the enrollment engine.
Swap Classes - View Results	SSR_SSENRL_RSLT	Click the Next button on the Swap Classes - Confirm your selection page.	Students use this page to view the result of their swap request.

Editing Classes

This section discusses how students can edit their enrollment requests through Campus Self Service.

Pages Used to Edit Classes

Page Name	Object Name	Navigation	Usage
Edit	SSR_SSENRL_EDIT	Self Service, Enrollment	Students use this page to select a class to edit.
Select a class to edit - Enrollment Preferences	SSR_CLS_DTLOPT	Click the next button on the Select Classes to edit - Class Detail page.	Students use this page to complete the information for their class enrollment requests.
Edit Class Enrollment Options - Confirm your Selections	SSR_SSENRL_EDIT_C	Click the Next button on the Select a class to edit - Enrollment Preferences page.	Students use this page to confirm their changes.
Edit Class Enrollment Options - View Results	SSR_SSENRL_RSLT	Click the Next button on the Edit Class Enrollment Options - Confirm your Selections page.	Students use this page to view the results of their changes.

View Your Exam Schedule

This section discusses how students view their exam schedule through Campus Self Service.

Page Used to View Your Exam Schedule

Page Name	Object Name	Navigation	Usage
Exam Schedule - View Details	SS_EXAM_SCHED	Self Service, Enrollment, View My Exam Schedule	Students use this page to view their exam schedule for a term.

Using Self-Service Pages and LMS Authentication

When you use PeopleSoft LMS authentication, students and instructors can use self-service pages to view their class schedule or teaching assignments for a term.

An LMS button appears next to LMS classes on these pages either when a provider for authentication is identified or when an LMS URL is provided on the Schedule of Classes - LMS Data page. The LMS button works the same on the Student Center page and the My Class Schedule self-service page for students and on the Faculty Center page for instructors.

Self-service users can also access a list of LMS providers and select the appropriate provider link to transfer directly to their home page in that LMS provider's website.

See Also

Customer Connection, PeopleSoft Student Records, "Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions 8.9"

Pages Used to Access the LMS Website

Page Name	Object Name	Navigation	Usage
Student Center	SSS_STUDENT_CENTER	Self Service, Student Center	Students click the LMS button on this page to access the LMS website.
My Class Schedule	SSR_SSENRL_LIST	Self Service, Enrollment, My Class Schedule	Students click the LMS button on this page to access the LMS website.
My Learning Management Systems	SSR_LMS_TARGET	Self Service, Academic Records, Learning Management Systems	Students use this page to access the LMS website.

Using the LMS Button to Access the LMS Website

Self-services users can access the Student Center or My Class Schedule self-service pages and click the LMS button to transfer to the appropriate external LMS site.

When an LMS provider is identified for authentication and the student clicks the LMS button on a self-service page, the system authenticates the user and transfers him or her directly to the academic content for the specified class within the external LMS. With authentication, the user does not have to log in to the external site.

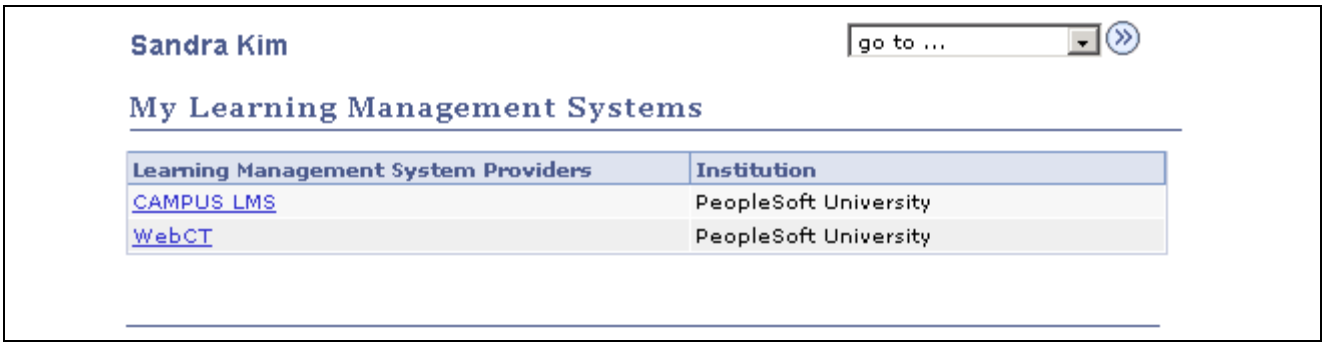
If instead of a provider an LMS URL is specified, no authentication takes place. The system transfers the student to the specified URL, such as an instructor's website, where they might or might not have to log in.

For students, the LMS button appears next to an LMS class if they are enrolled in that class and have not dropped or withdrawn from the class.

If neither an LMS provider nor an LMS URL are assigned, the LMS button does not appear.

Using the Provider Link to Access the LMS Site

Self-services users can access the My Learning Management Systems self-service page and click the LMS provider link to transfer to the appropriate external LMS site.



My Learning Management Systems page

Students can click an LMS provider link to access the appropriate external website. The system performs the authentication and transfers them directly to their home page in that provider's website.

For students, the system lists only those providers who are defined for the student's academic institution and that are set to display as a link on the LMS Provider page. If the student has multiple programs, each associated with a different institution, then the valid LMS providers for each of those institutions appear.

Note. For a provider link to appear on the Learning Management Systems provider page, the Display as LMS Link must be selected on the LMS Provider page.

CHAPTER 9

Using Self-Service Student Financials

This chapter provides an overview of the Student Financials self service application and discusses how students can:

- View outstanding charges, payments, financial aid, and refunds.
- Create credit card or eCheck payment profiles.
- Make a step-by-step payment toward outstanding charges using the payment wizard.

Understanding How to Use Self Service for Student Financials

Students use Student Financials self service to review account activity, create and store payment profiles, and make payments. What students see when they access Student Financials self service depends on what your institution has defined on the set up pages. For example, you can use Institution Sets to specify not only that students view their account activity by business unit, term or by charge, but you can also decide whether or not to display pending payments, financial aid totals, and charges due.

See Chapter 5, "Setting Up Self-Service Student Financials," Setting Up Institution Sets, page 24.

Viewing Outstanding Charges, Payments, and Financial Aid

This section discusses how to:

- View a summary of the student's account, including outstanding charges and deposits, pending payments, pending financial aid, and total due.
- View an account activity of all transactions posted to the student's account, including charges, payments, financial aid, and refunds.
- View outstanding charge and deposit details.
- View a history of posted and pending payments made.
- View any anticipated or pending financial aid that has not been posted to the student's account yet.

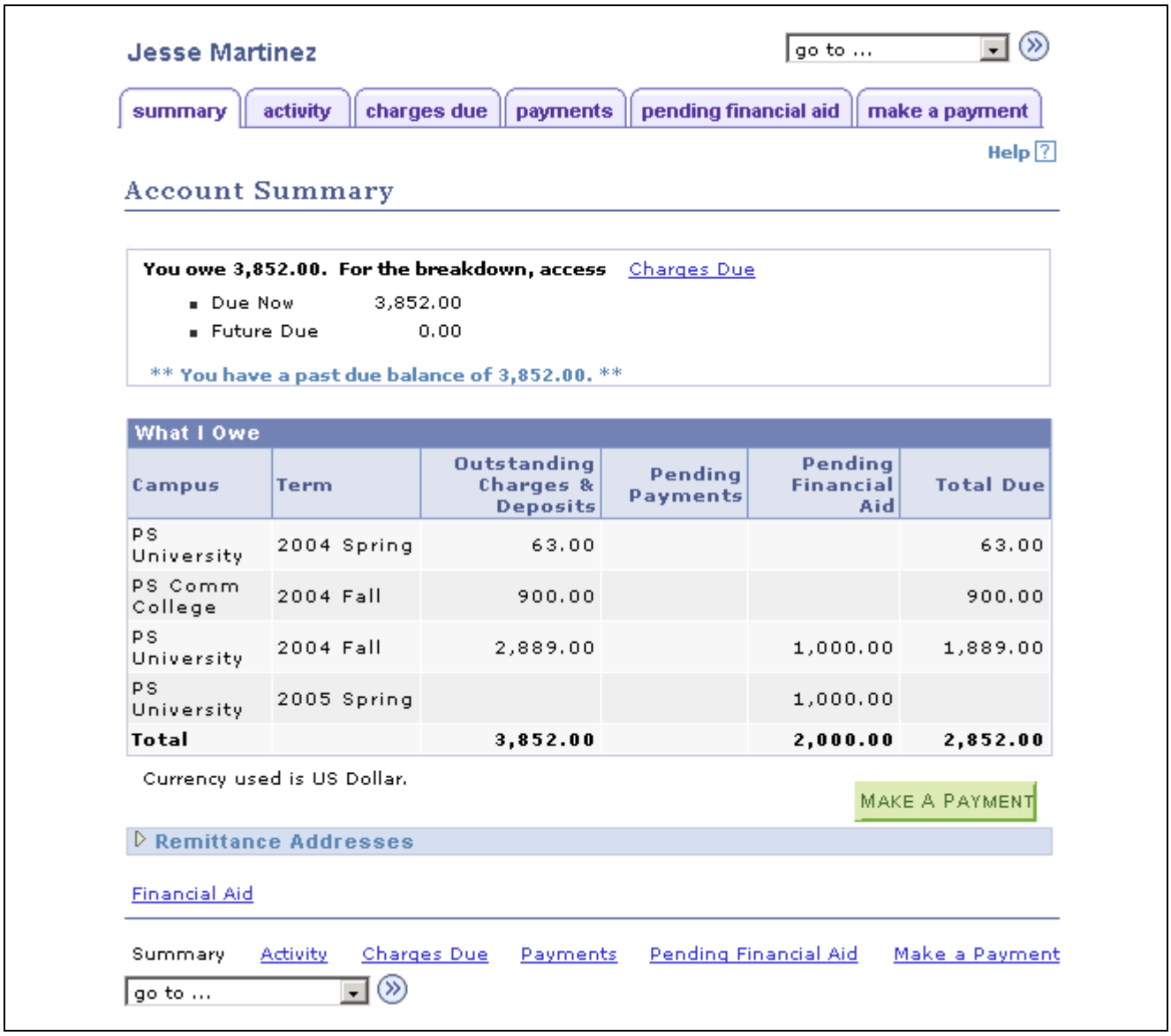
Page Used to View Charges and Payments

Page Name	Object Name	Navigation	Usage
Account Summary	SSF_SS_ACCT_SUMM	Self Service, Campus Finances, Account Inquiry	Students use this page to review a summary of outstanding charges and deposits, pending payments, pending financial aid, and total due.
Account Activity	SSF_SS_ACCT_ACTVTY	Self Service, Campus Finances, Account Inquiry. Click the Activity link or tab located on any page.	Students use this page to review all of the account activity that has transpired over a fixed period of time – activity that includes anything that has been posted to the student's account, including charges, cash, check, or credit card payments, financial aid, refunds, etc. Administrators can choose to suppress this page from being displayed to the student via the SF Institution Set setup.
Charges Due	SSF_SS_CHRGS_DUE	• Click the Charges Due link on the Account Summary page. • Click the Charges Due link or tab located on any page.	Students can review all of their outstanding charges and deposits incurred to date, including charge details. Administrators can choose to suppress this page from being displayed to the student via the SF Institution Set setup.
Detail by Charge	SSF_SS_CHRG_DUE_DT	• Self Service, Campus Finances, Account Inquiry. Click the Charges Due link or tab located on any page. • In the Details by Charge table, click on the Multiple link.	Students use this page to review the multiple due dates associated with a charge.

Page Name	Object Name	Navigation	Usage
Payment History	SSF_SS_PMT_HIST	Self Service, Campus Finances, Account Inquiry – click the Payments link or tab located on any page.	Students use this page to review all of the payments that have been posted to their account. Administrators can choose to suppress this page from being displayed to the student via the SF Institution Set setup, whether or not Pending Payments will be displayed on this page, and whether students will be permitted to drill down on posted payments to see which charges were reduced by those payments.
Payment History - Charges Paid by this Payment	SSF_SS_CHRGS_PAID	• Self Service, Campus Finances, Account Inquiry. Click the Payments link or tab located on any page. • In the Posted Payments table, click on the linked amount.	Students use this page to view the charges that were reduced by this payment as well as any unapplied amounts.
Pending Financial Aid	SSF_SS_PEND_FINAID	Self Service, Campus Finances, Account Inquiry. Click the Pending Financial Aid link or tab located on any page.	Students use this page to review any pending or anticipated aid that has yet to be posted to their account. Administrators can choose to suppress this page from being displayed to the student via the SF Institution Set setup.

Viewing an Account Summary

Access the Account Summary page.



Account Summary page

Charges Due Click this link to go to the charges due page.

Due Now and **Future Due** The amounts displayed here are based on the parameters set up in the Days in future for 'due now' field on the Institution Set page. The formula used to calculate the 'Due Now' amount is any charges incurred through today plus the number of days specified here. The formula used to calculate the 'Future Due' amount is any charges incurred after today's date plus the number of days specified here.

Past Due Balance This amount represents charges that were incurred through yesterday (current date minus 1).

See Chapter 5, "Setting Up Self-Service Student Financials," Defining Basic Institution Set Parameters, page 24.

What I Owe

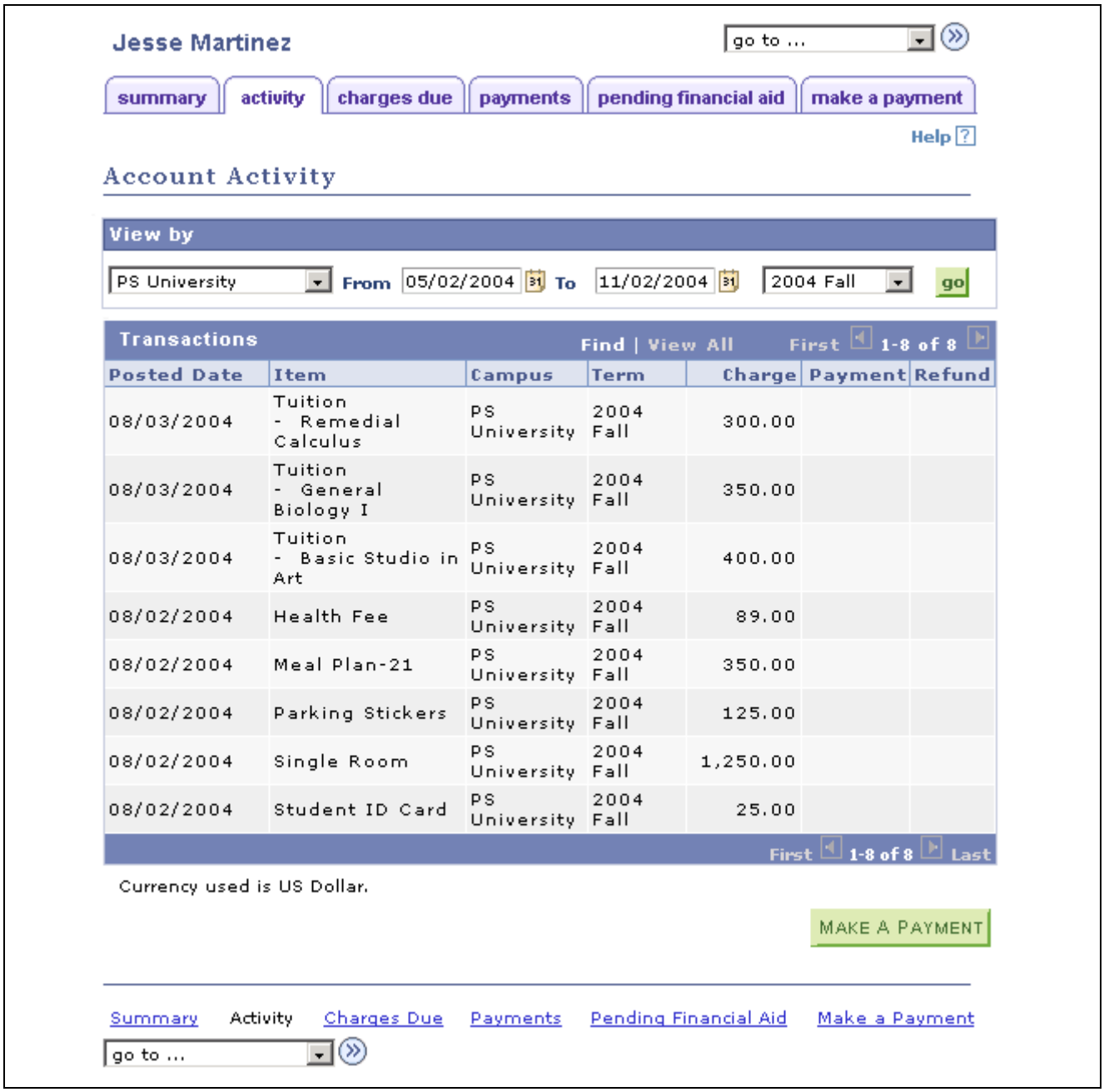
The columns that appear in the What I Owe table are based on the allocation level you specified on the Institution Set page (meaning that the Pending Payments and Pending Financial Aid columns can be suppressed by the Administrator).

Remittance Addresses

The remittance address that displays is based on the Location you selected on the SF Business Unit page.

Viewing Account Activity

Access the Account Activity page.

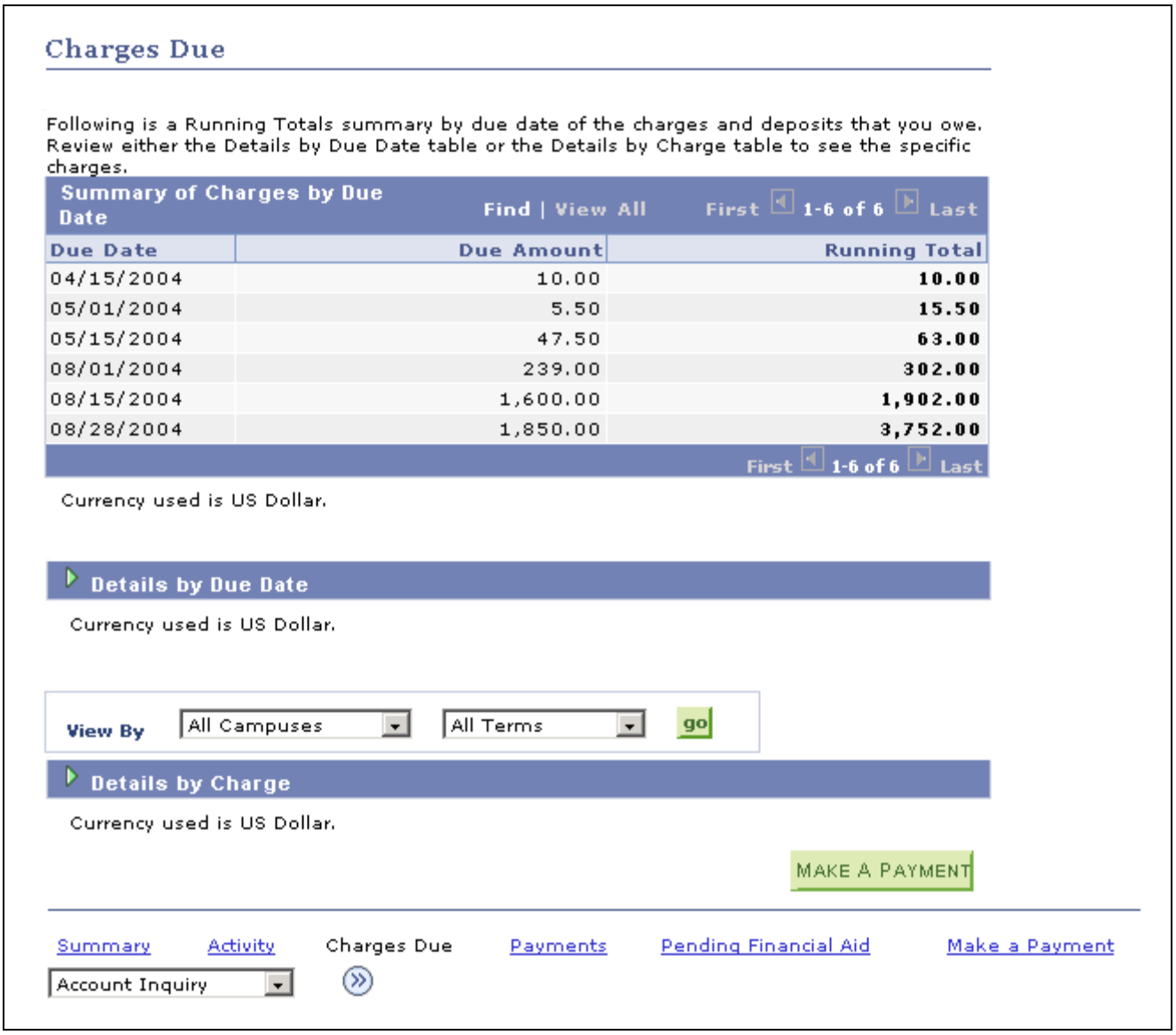


Account Activity page

Students can filter account activity by campus, and term for specific dates or a range of dates. Additionally, students can use Find to search for specific transactions.

Viewing Charges Due Details

Access the Charges Due page.



Charges Due page

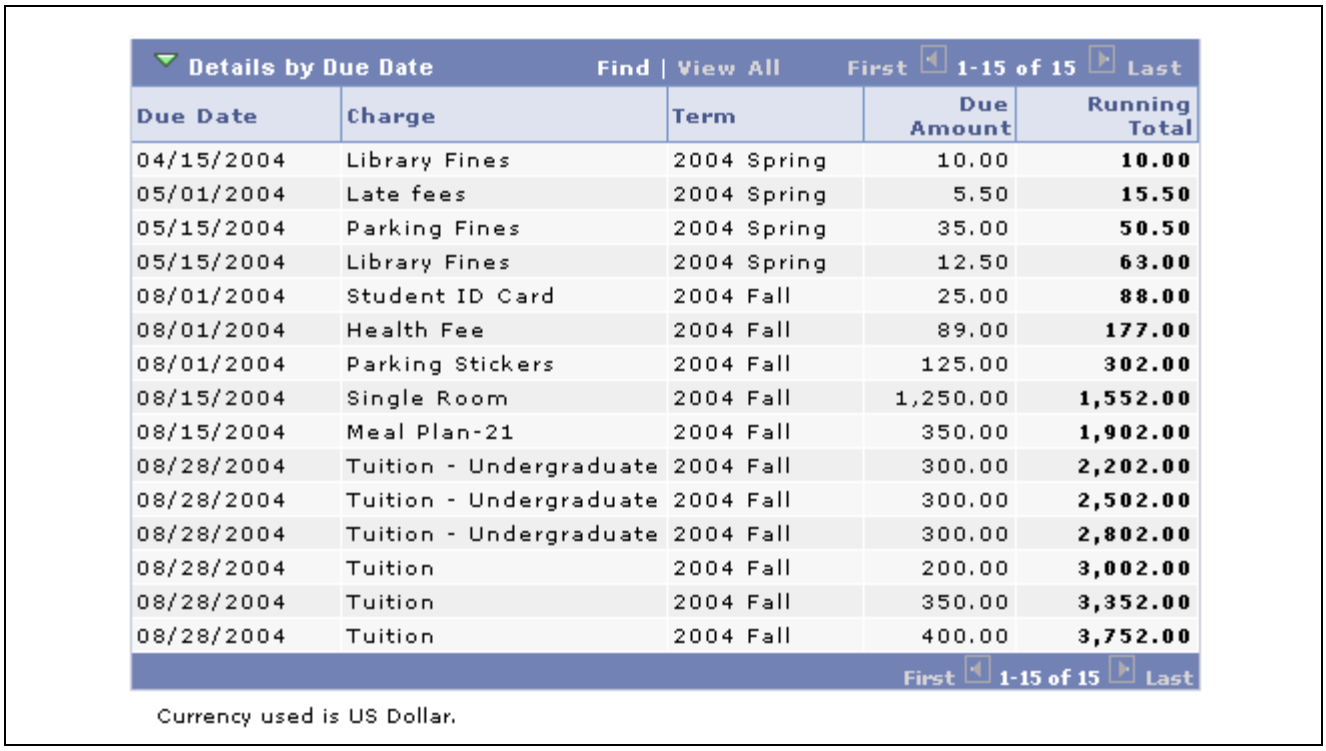
This page reflects three different views of the student's outstanding charges due, one table reflects the summary due by due date, and the other two tables reflects the outstanding charges in detail. Click the Details by Due Date or Details by Charge drop down to view detail charges.

Details by Due Date Expand the Details by Due Date section to view charge details by due date. .

Details by Charge Click the Details by Charge drop down to view charge details. Students can filter by campus and term.

Viewing Details by Due Date

Access the Details by Due Date page.



Details by Due Date Find | View All First 1-15 of 15 Last

Due Date	Charge	Term	Due Amount	Running Total
04/15/2004	Library Fines	2004 Spring	10.00	**10.00**
05/01/2004	Late fees	2004 Spring	5.50	**15.50**
05/15/2004	Parking Fines	2004 Spring	35.00	**50.50**
05/15/2004	Library Fines	2004 Spring	12.50	**63.00**
08/01/2004	Student ID Card	2004 Fall	25.00	**88.00**
08/01/2004	Health Fee	2004 Fall	89.00	**177.00**
08/01/2004	Parking Stickers	2004 Fall	125.00	**302.00**
08/15/2004	Single Room	2004 Fall	1,250.00	**1,552.00**
08/15/2004	Meal Plan-21	2004 Fall	350.00	**1,902.00**
08/28/2004	Tuition - Undergraduate	2004 Fall	300.00	**2,202.00**
08/28/2004	Tuition - Undergraduate	2004 Fall	300.00	**2,502.00**
08/28/2004	Tuition - Undergraduate	2004 Fall	300.00	**2,802.00**
08/28/2004	Tuition	2004 Fall	200.00	**3,002.00**
08/28/2004	Tuition	2004 Fall	350.00	**3,352.00**
08/28/2004	Tuition	2004 Fall	400.00	**3,752.00**

First 1-15 of 15 Last

Currency used is US Dollar.

Details by Due Date page

Charges are displayed by date within a term.

Viewing Details by Charge

Access the Details by Charge page.



View By All Campuses All Terms go

Details by Charge Find | View All First 1-15 of 16 Last

Charge	Due Date	Term	Campus	Amount
Library Fines	multiple	2004 Spring	PS University	22.50
Late fees	05/01/2004	2004 Spring	PS University	5.50
Parking Fines	05/15/2004	2004 Spring	PS University	35.00
Student ID Card	08/01/2004	2004 Fall	PS University	25.00
Health Fee	08/01/2004	2004 Fall	PS University	89.00
Parking Stickers	08/01/2004	2004 Fall	PS University	125.00
Meal Plan-21	08/15/2004	2004 Fall	PS University	350.00
Single Room	08/15/2004	2004 Fall	PS University	1,250.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	PS Comm College	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	PS Comm College	300.00
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	PS Comm College	300.00
Tuition - Remedial Calculus	08/28/2004	2004 Fall	PS University	200.00
Tuition - General Biology I	08/28/2004	2004 Fall	PS University	350.00
Tuition - Basic Studio in Art	08/28/2004	2004 Fall	PS University	400.00
Total due for this view				**3,752.00**

First 1-15 of 16 Last

Currency used is US Dollar.

Details by Charge page

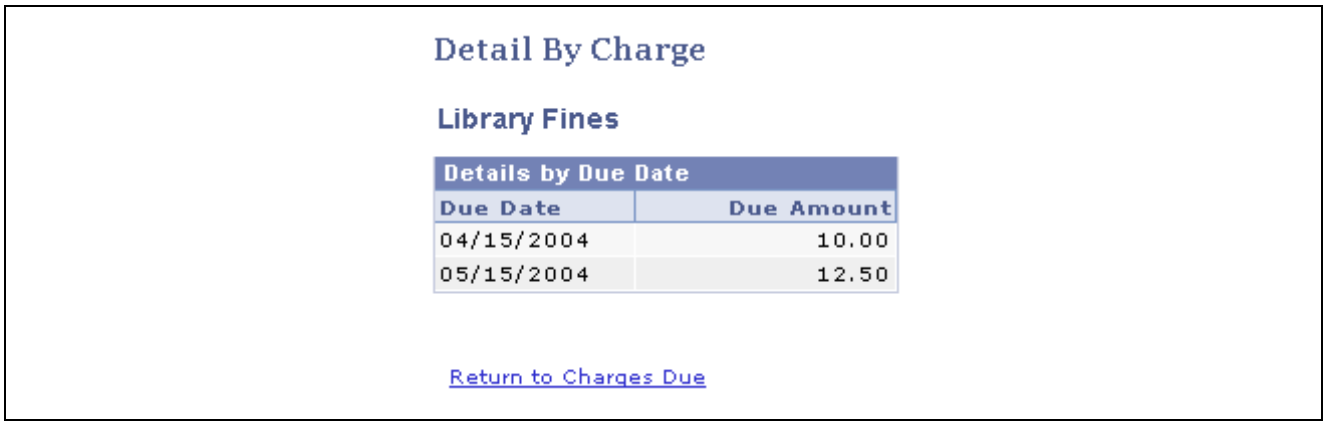
Charges are displayed based on the selection in the View By field.

View By Students can use these fields to filter the charges due by campus and by term.

Multiple If a charge has multiple due dates, students can click this link to check those dates.

Viewing Detail by Charge

Click Multiple to view the Detail by Charge page.

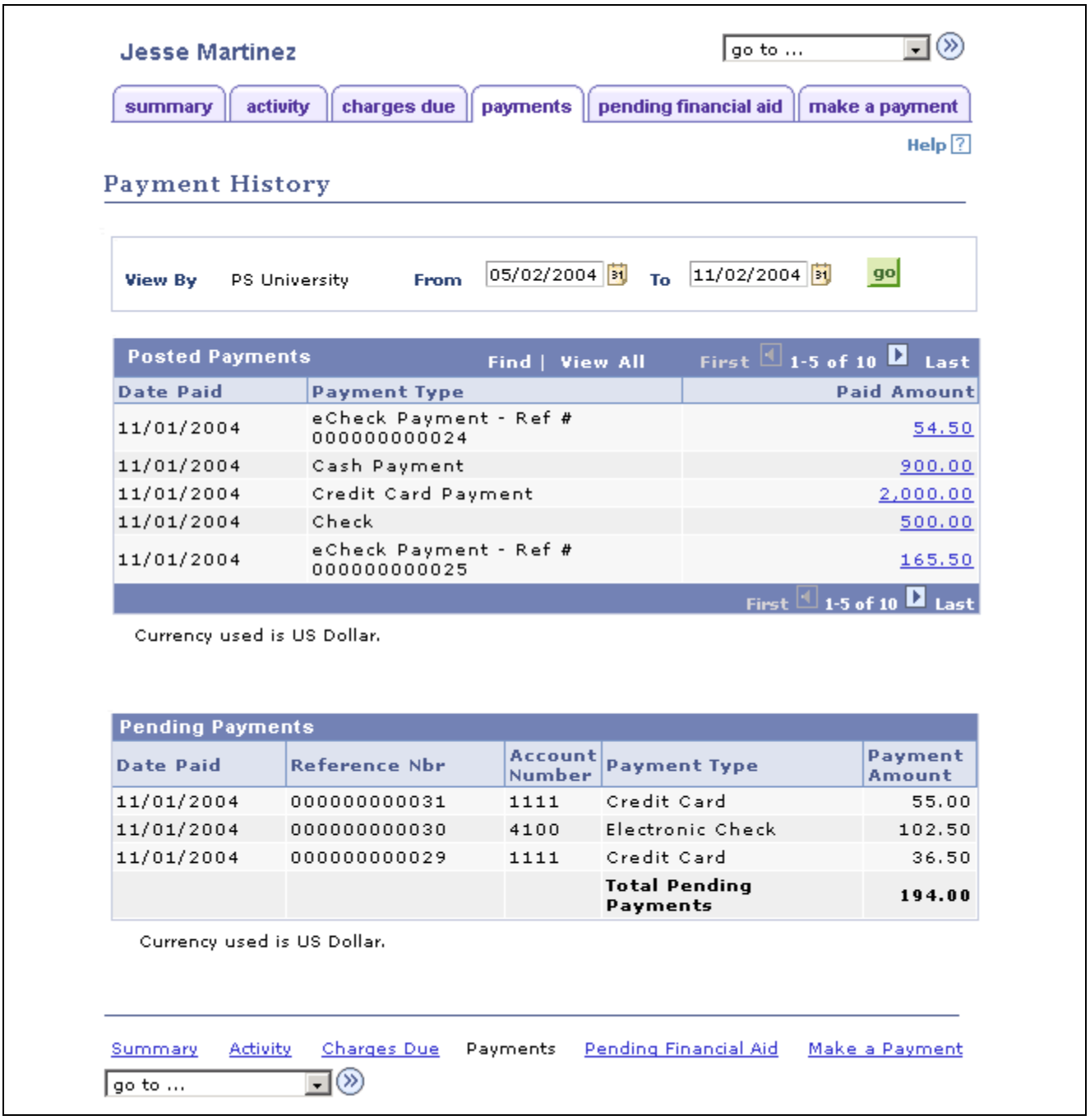


Detail by Charge — Multiple Charges link page

Students can click Return to Charges Due to return to the previous page.

Viewing Payment History

Access the Payment History page.



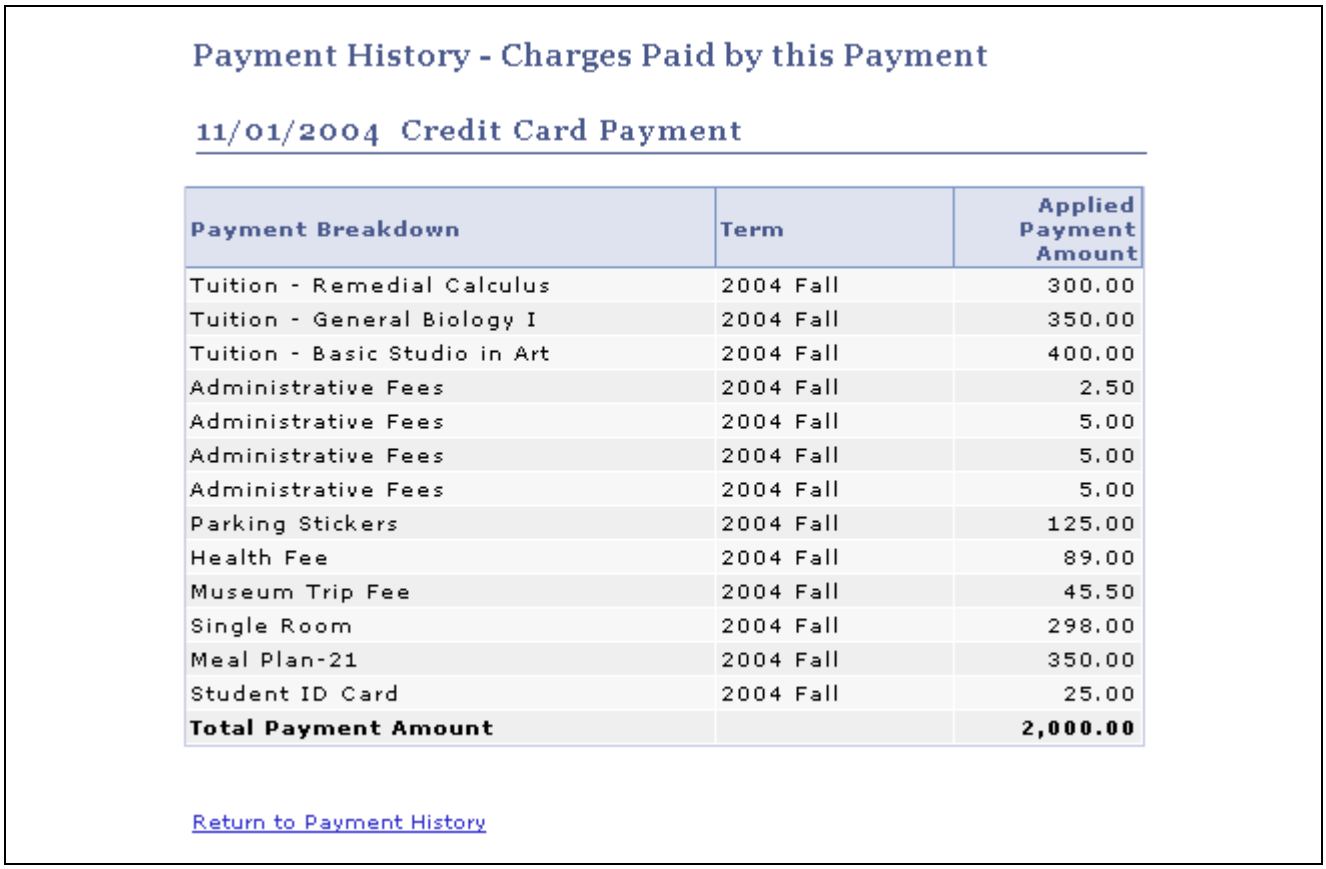
Payment History page

Students can view all posted and pending payment activity and filter by date.

Paid Amount Click to view the specific charges paid by this payment.

Viewing the Charges Paid by a Payment

Access the Payment History — Charges Paid by this Payment page.



Payment History - Charges Paid by this Payment

11/01/2004 Credit Card Payment

Payment Breakdown	Term	Applied Payment Amount
Tuition - Remedial Calculus	2004 Fall	300.00
Tuition - General Biology I	2004 Fall	350.00
Tuition - Basic Studio in Art	2004 Fall	400.00
Administrative Fees	2004 Fall	2.50
Administrative Fees	2004 Fall	5.00
Administrative Fees	2004 Fall	5.00
Administrative Fees	2004 Fall	5.00
Parking Stickers	2004 Fall	125.00
Health Fee	2004 Fall	89.00
Museum Trip Fee	2004 Fall	45.50
Single Room	2004 Fall	298.00
Meal Plan-21	2004 Fall	350.00
Student ID Card	2004 Fall	25.00
Total Payment Amount		**2,000.00**

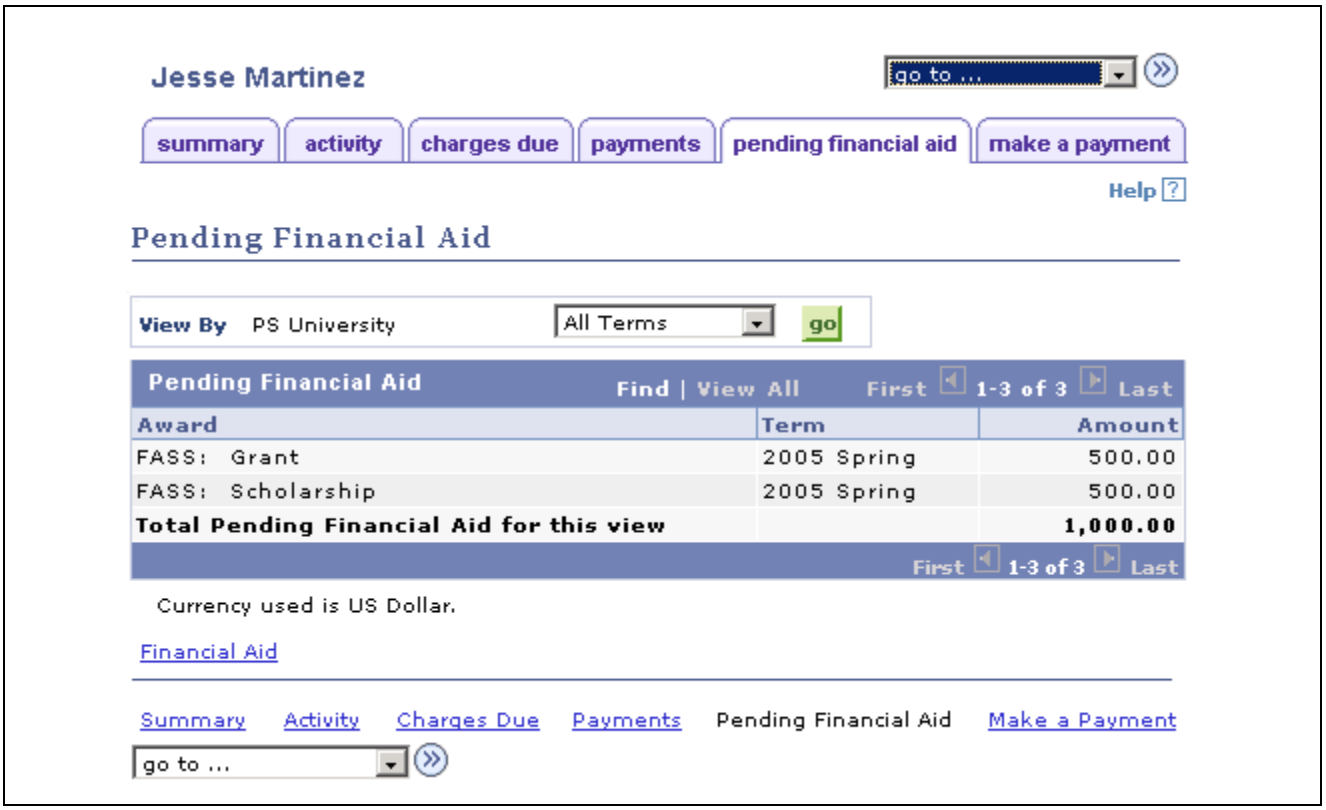
Return to Payment History

Payment History – Charges Paid by this Payment page

Click Return to Payment History to return to the previous page.

Pending Financial Aid

Access the Pending Financial Aid page.



Pending Financial Aid page

Students can view pending financial aid amounts by all terms, or specific terms.

Financial Aid Click to access financial aid information.

See Chapter 10, "Using Self Service Financial Aid," page 91.

Creating Payment Profiles

This section provides an overview of self-service payment profiles and discusses how to:

- Add and delete payment profiles.
- View and edit payment profile details.

Understanding Payment Profiles

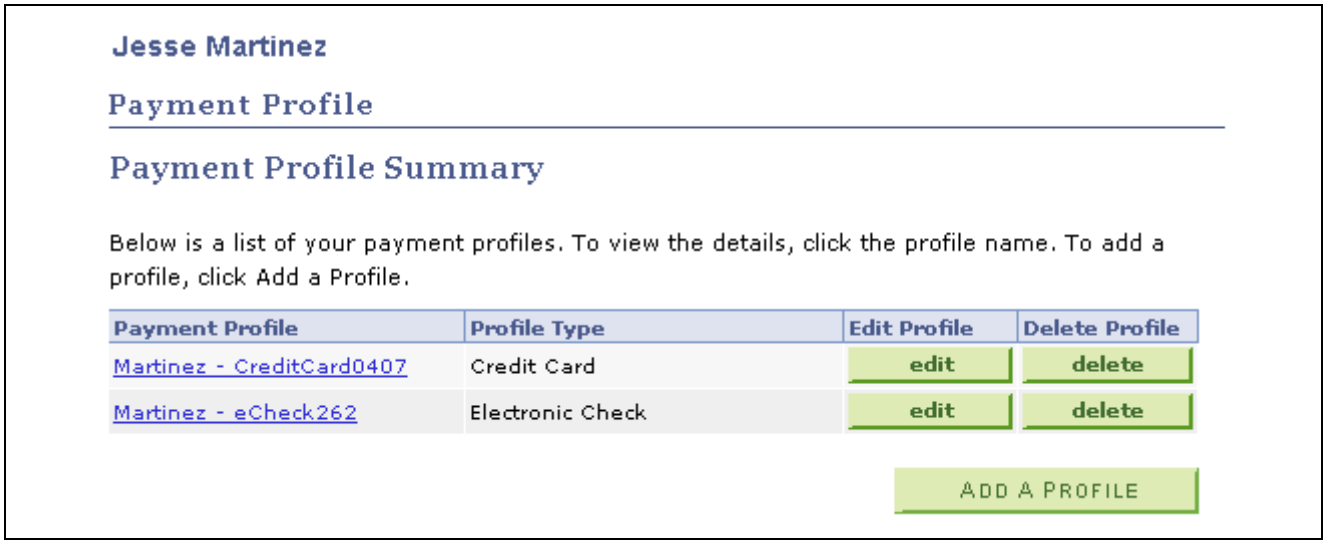
PeopleSoft Student Financials enables students to create payment profiles for their various eCheck (checking and/or savings) or credit card (Visa, Mastercard, American Express, etc.) accounts. By establishing payment profiles, students enter their eCheck and credit card information only once in the Payment Profile component. Then, when they make self service payments, students simply select the desired payment profile instead of having to enter their lengthy account information. In addition, if a student designates one of her payment profiles as preferred, the system selects that payment profile by default when the student makes a self service payment.

Pages Used to Create Self Service Payment Profiles

Page Name	Object Name	Navigation	Usage
Payment Profile — Payment Profile Summary	SS_SF_ACCT_PROFILE	Self Service, Campus Finances, Payment Profile	Add payment profiles. If students have established profiles, they are displayed here.
Payment Profile — Edit Payment Profile	SS_SF_ACCT_PRFL_D	Click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile.	Edit or delete details for payment profiles.

Adding and Deleting Payment Profiles

Access the Payment Profile – Payment Profile Summary page.



Payment Profile – Payment Profile Summary page

If a student has not yet created a payment profile, the table will be empty. Students click Add A Profile to create a payment profile.

Payment Profile Click a link under this heading to access a display-only version of the Payment Profile — Payment Profile Summary page.

Profile Type Indicates whether the profile is for an *Electronic Check* or *Credit Card* account.

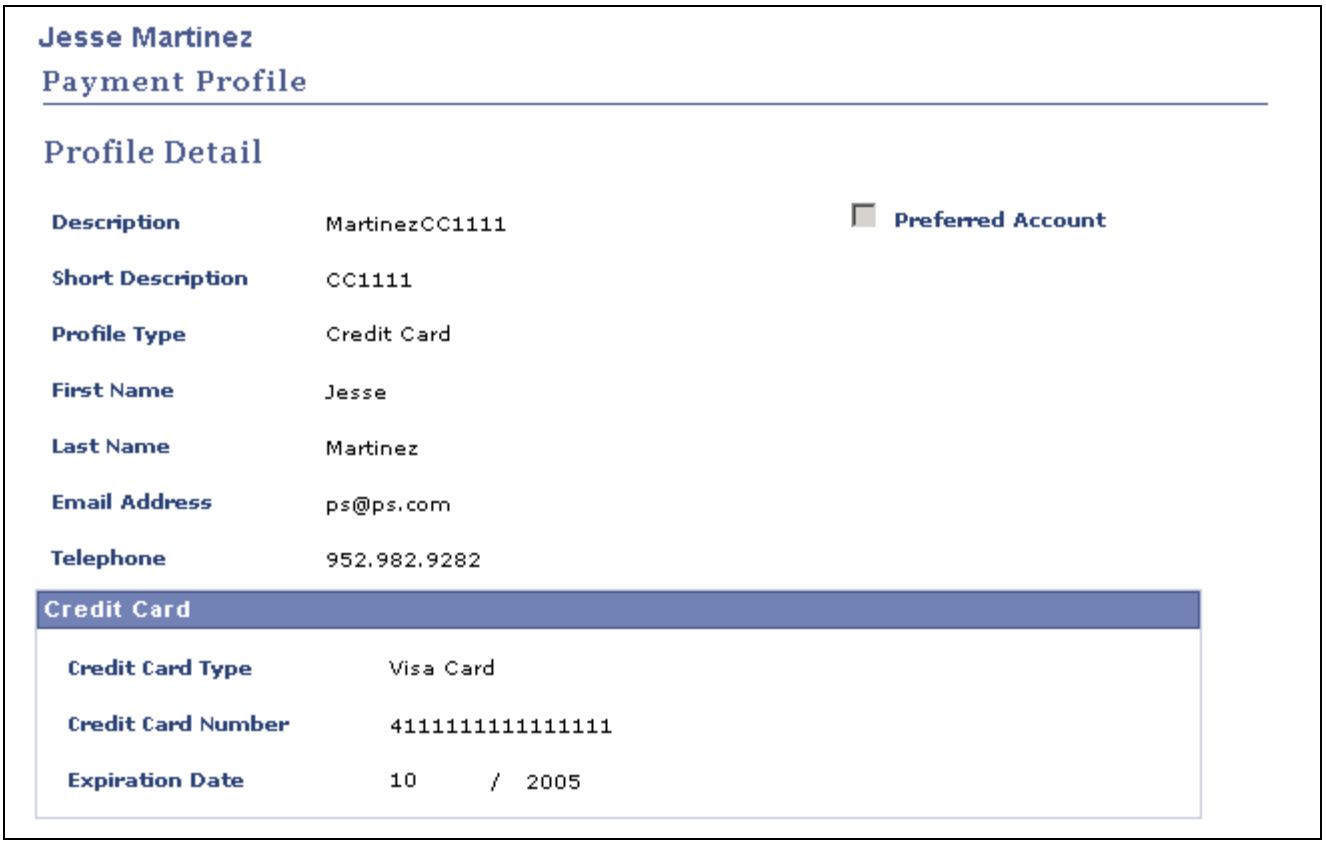
Edit Profile Click to access an editable version of the Payment Profile — Payment Profile Summary page.

Delete Profile Click next to the payment profile that you want to delete.

Add a Profile Click to add a new payment profile.

View and Edit Payment Profile Details

Access the Payment Profile – Profile Detail page.



Payment Profile – Profile Detail page

Preferred Account Select to designate this payment profile (Edit mode only) as the one that the system selects by default whenever the student makes a self service payment. A student can have only one preferred payment profile per Profile (or payment) type.

Profile Type Specify whether the profile is for an *Electronic Check* or *Credit Card* account. If you select *Electronic Check*, the eCheck group box becomes available. If you select *Credit Card*, the Credit Card group box becomes available.

eCheck

Specify whether the account you are defining is a checking or savings account and enter the appropriate routing and account numbers.

Credit Card

Select the credit card type and enter the credit card number and expiration date.

Making Self Service Payments

This section provides and overview of self-service payments and discusses how to:

- Select payment method.
- Specify payment details.

- Specify payment amounts.
- Confirm payment.
- View payment results.

Understanding Self Service Payments

PeopleSoft Student Financials self service enables your students to access their account information and make payments over the internet. The self service pages can be accessed in different ways: from the Student Center, the Account Inquiry page, or the left navigation.

Self Service Account Review

Students often want to view their account information more than once a month when they receive their statements from the university. Using self service, students can view up-to-date information about their accounts at any time.

Total Due Charges Review

When students want to know how much money they owe to the institution, they may not want to sift through all their account activity for each term. Campus Finances self service provides a direct way for these students to see their due charges.

Self Service Payments

The Make a Payment self service component enables students to make electronic payments toward their account. Depending on whether or not your institution accepts both credit card payments and eCheck payment methods, the Make a Payment component provides students with an easy 4 or 5 step process also known as the Payment Wizard. Additionally, if you set up your institution set to allow it, students can allocate their self service payments to specific charges.

Messaging

PeopleSoft delivers a set of messages that accompany many of the self service pages. These messages are intended to help students through the self service experience. These messages are user-defined in Message Catalog, and can be modified by you. They appear at the top of most pages. For instance, if a student is paying with an eCheck, then she will get the following message about her PIN as a potential requirement for user authentication: “You will need your PIN in order to submit an eCheck Transaction.” Messages can only be changed by you as an administrator and not by students.

Prerequisites

Before students can access their accounts over the internet, you have to set up your PeopleSoft Student Financials system to allow them to do so by setting up an institution set and SF merchant IDs. The choices that you make when setting up an institution set determine what your students can see and do when accessing their accounts. Different fields and pages are available to your students depending on how you set up your institution set.

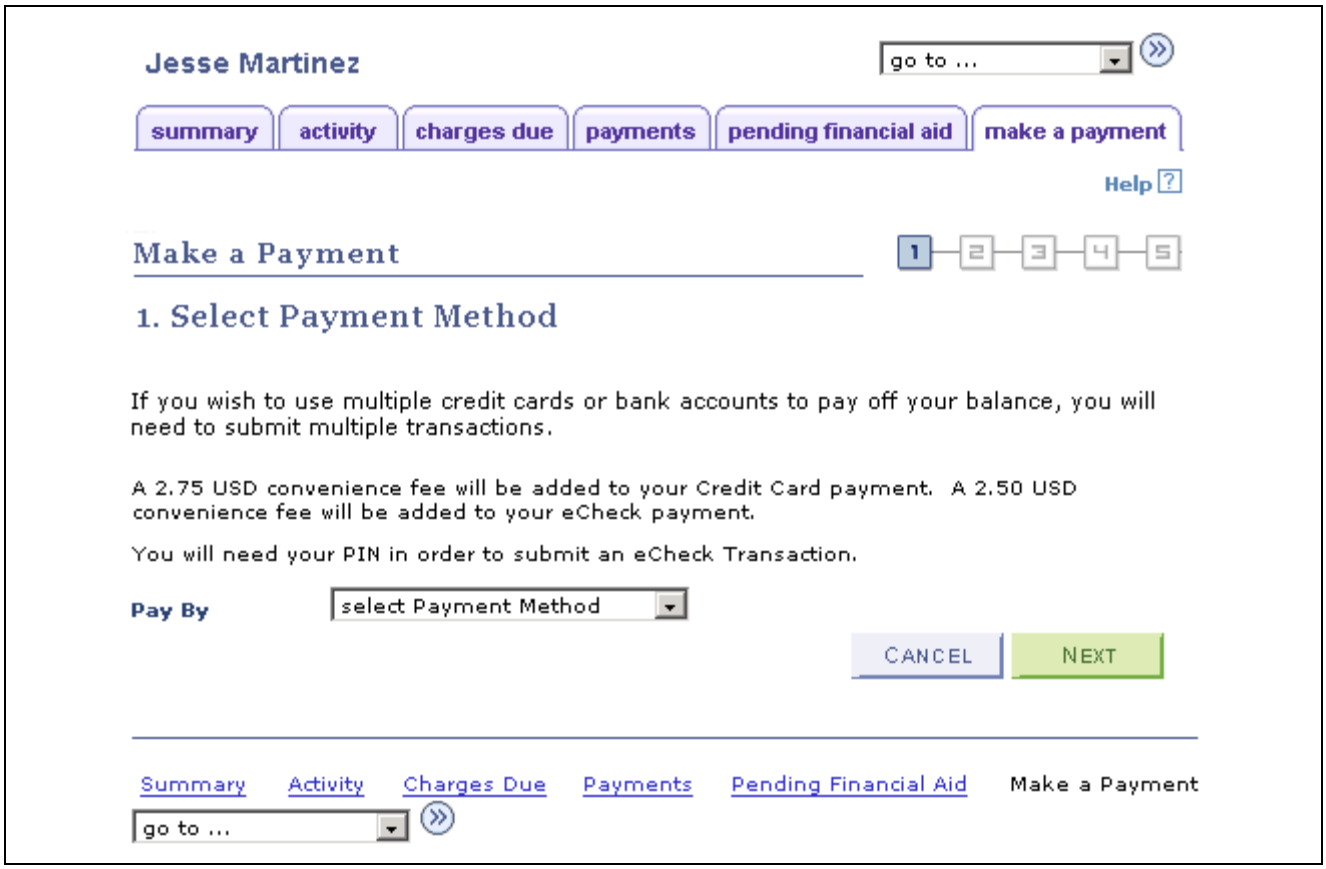
See Chapter 5, “Setting Up Self-Service Student Financials,” Setting Up Institution Sets, page 24.

Pages Used to Make Self Service Payments

Page Name	Object Name	Navigation	Usage
Make a Payment — Select Payment Method	SSF_SS_PMT_METHOD	• Self Service, Campus Finances, Make a Payment • (Step 1 of the Payment Wizard)	Depending on whether or not the institution supports both the eCheck and credit card payment methods, the student will choose the method by which to make a payment.
Make a Payment — Specify Payment Details	SSF_SS_PMT_CR_CARD	• Make a Payment — Specify Payment Method, Next button • (Step 2 of the Payment Wizard)	The student must specify either the credit card or eCheck payment details for the current transaction.
Make a Payment — Specify Payment Amount	SSF_SS_PMT_ALLOC	• Make a Payment — Specify Payment Details, Next button • (Step 3 of the Payment Wizard)	The student must specify the amount she wants to pay toward her outstanding charges.
Make a Payment — Confirm Payment	SSF_SS_PMT_SUBMIT	• Make a Payment — Specify Payment Amount, Next button • (Step 4 of the Payment Wizard)	The student must confirm the payment method, account details, and payment amount of the transactions she is about to submit for payment.
Make a Payment — Payment Result	SSF_SS_PMT_RESULT	• Make a Payment — Confirm Payment, Submit button • (Step 5 of the Payment Wizard)	The student uses this page to capture the transmission details of the transaction that was submitted.

Selecting Payment Methods

Access the Make a Payment — Select Payment Method page.



Make a Payment — Select Payment Method page

This page enables students to choose whether they want to pay by credit card or by eCheck. This page appears for students only if you enter a value in both the Credit Card Merchant ID and Electronic Check Merchant ID fields for the associated institution set. If you allow only one type of payment, this page does not appear. The payment method defaults to the only value available.

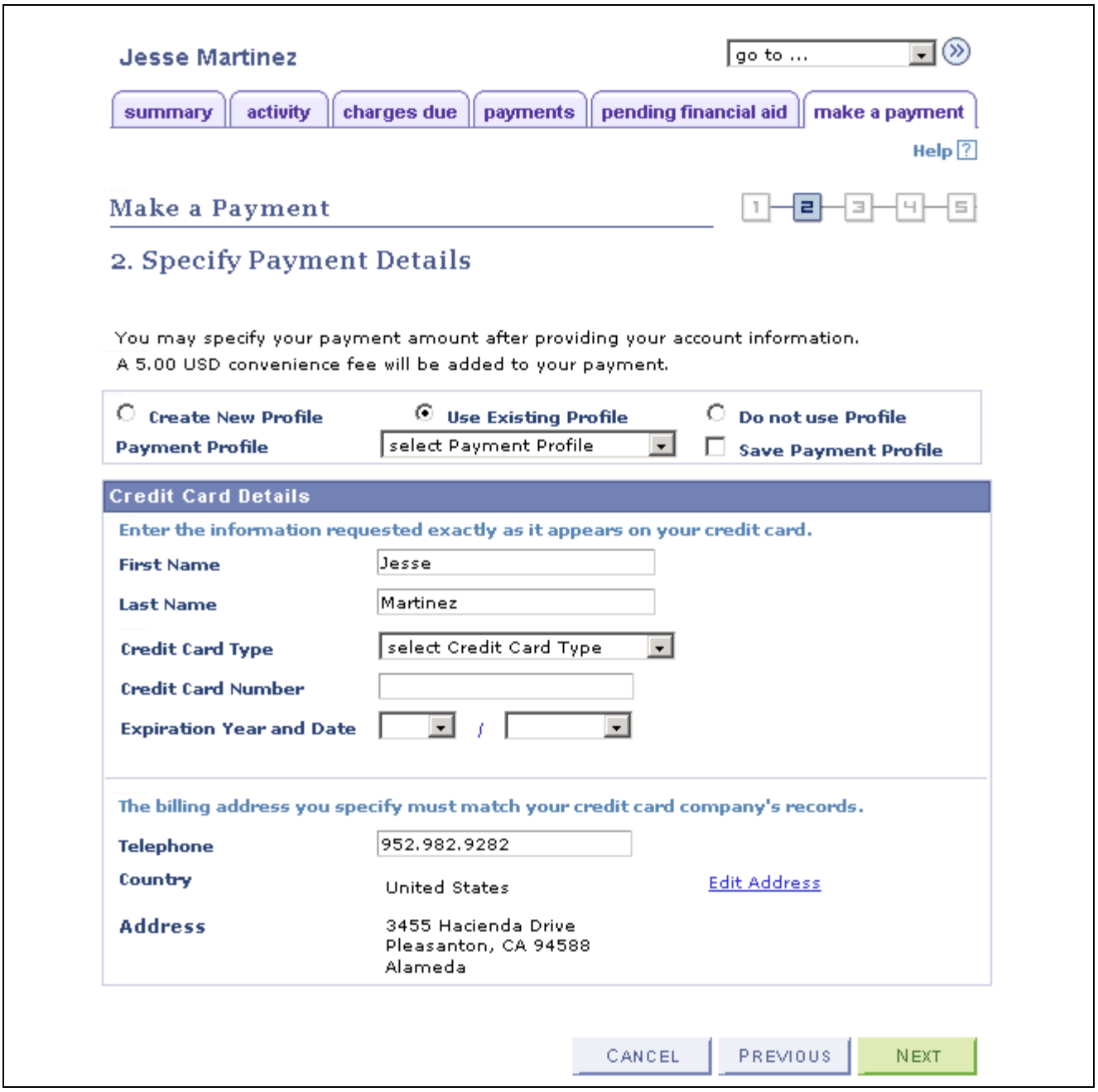
Note. The selection a student makes determines which of her charges are eligible for payment, according to the charge priority list you defined for the item type associated with the selected payment method. For example, if a student selects Electronic Check, the Payment Details page and the Payment Amount page display only the charges on the student's account that are eligible for payment by the eCheck item type you defined.

See Also

Chapter 5, "Setting Up Self-Service Student Financials," Defining Basic Institution Set Parameters, page 24

Specifying Payment Details

Access the Make a Payment — Specify Payment Details page.



Make a Payment — Specify Payment Details page

If a student has not created a payment profile before accessing this page, she will be able to create an initial one from this page, before being able to enter or confirm ePayment information.

Create New Profile, Use Existing Profile, Do not use Profile, Save Payment Profile	Students choose from these options, depending on whether or not they have already created a payment profile Students can also use this attribute to update an existing Payment Profile as part of successfully transmitting an ePayment transaction.
Payment Profile	If a student has created a payment profile, she will be able to select it from the Payment Profile drop down.

Depending on whether the student chose credit card or electronic check, the following fields will differ.

Credit Card Details

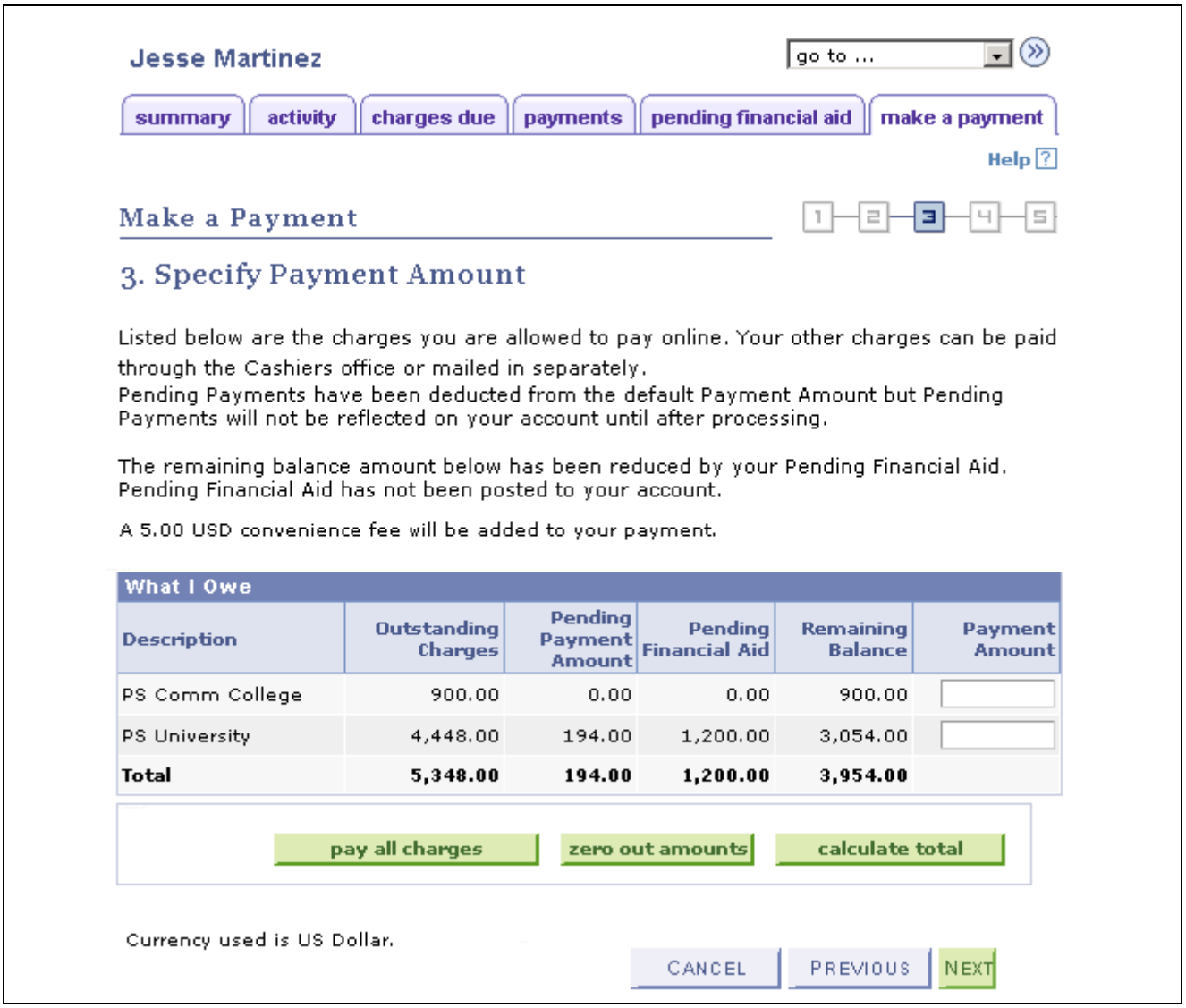
First Name, and **Last Name**	Students enter the first and last name on the bank account.
Credit Card Type	Students select the type of credit card to use.
Credit Card Number	Students enter the credit card number.
Expiration Year and Date	Students enter the expiration year and date for the credit card.
Telephone	Students enter the telephone number.
Country and **Address**	Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.
Edit Address	Students click this link to change their address for the current ePayment transaction.

eCheck Account Details

First Name, Last Name	Students enter the first and last name on the bank account.
Bank Account Type	Students select the type of bank account to use.
Routing Number	Students enter the routing number for the bank account.
Account Number	Students enter the account number for the bank account.
Telephone	Students enter the telephone number.
Country and **Address**	Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.
Edit Address	Students click this link to change their address for the current ePayment transaction.

Specifying Payment Amounts

Access the Make a Payment — Specify Payment Amount page.



Make a Payment — Specify Payment Amount page (1 of 2)



My Charges

PS Comm College

Item Description	Due Date	Item Term	Outstanding Charges
Tuition - Undergraduate - General Biology II	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - General Chemistry	08/28/2004	2004 Fall	300.00
Tuition - Undergraduate - Pract Acct Proc	08/28/2004	2004 Fall	300.00
Total			**900.00**

Currency used is US Dollar.

PS University

Item Description	Due Date	Item Term	Outstanding Charges
Parking Fines	05/15/2004	2004 Spring	35.00
Library Fines	multiple..	2004 Spring	22.50
Late fees	05/01/2004	2004 Spring	5.50
Single Room	08/15/2004	2004 Fall	1,250.00
Meal Plan-21	08/15/2004	2004 Fall	350.00
Health Fee	08/01/2004	2004 Fall	89.00
Parking Stickers	08/01/2004	2004 Fall	125.00
Student ID Card	08/01/2004	2004 Fall	25.00
Tuition - Remedial Calculus	08/28/2004	2004 Fall	200.00
Tuition - General Biology I	08/28/2004	2004 Fall	350.00
Tuition - Basic Studio in Art	08/28/2004	2004 Fall	400.00
Total			**2,852.00**

Currency used is US Dollar.

Make a Payment — Specify Payment Amount page (2 of 2)

What I Owe

The columns that appear in the What I Owe table are based on the allocation level you specified on the Institution Set page.

Payment Amount Students can enter different amounts for each of the different charges that are displayed.

pay all charges Students click to pay all charges listed.

zero out amounts Students click to zero out amounts in the Payment Amount fields.

calculate total Students click to calculate the amounts in the Payment Amount fields.

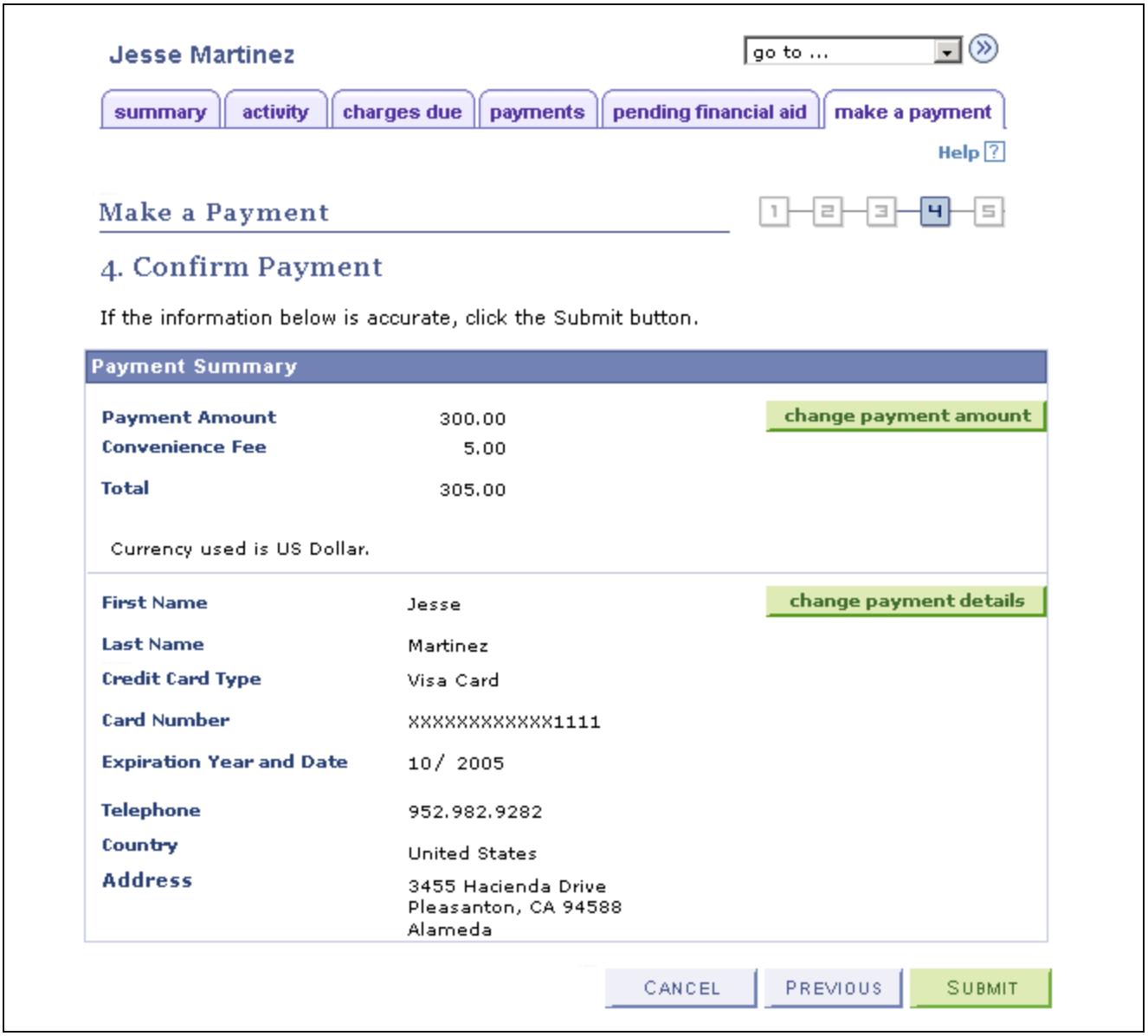
Charges Due

The Charges Due table is based on what your institution defined in the set up. If the allocation level you specified on the Institution Set page is *By Business Unit*, the charge details will be grouped by business unit. If the allocation level you specified on the Institution Set page is *By Term*, the charge details will be grouped by term within business unit.

Multiple If a charge has multiple due dates, students can click this link to check those dates.

Confirming Payments

Access the Make a Payment — Confirm Payment page.



Make a Payment — Confirm Payment page

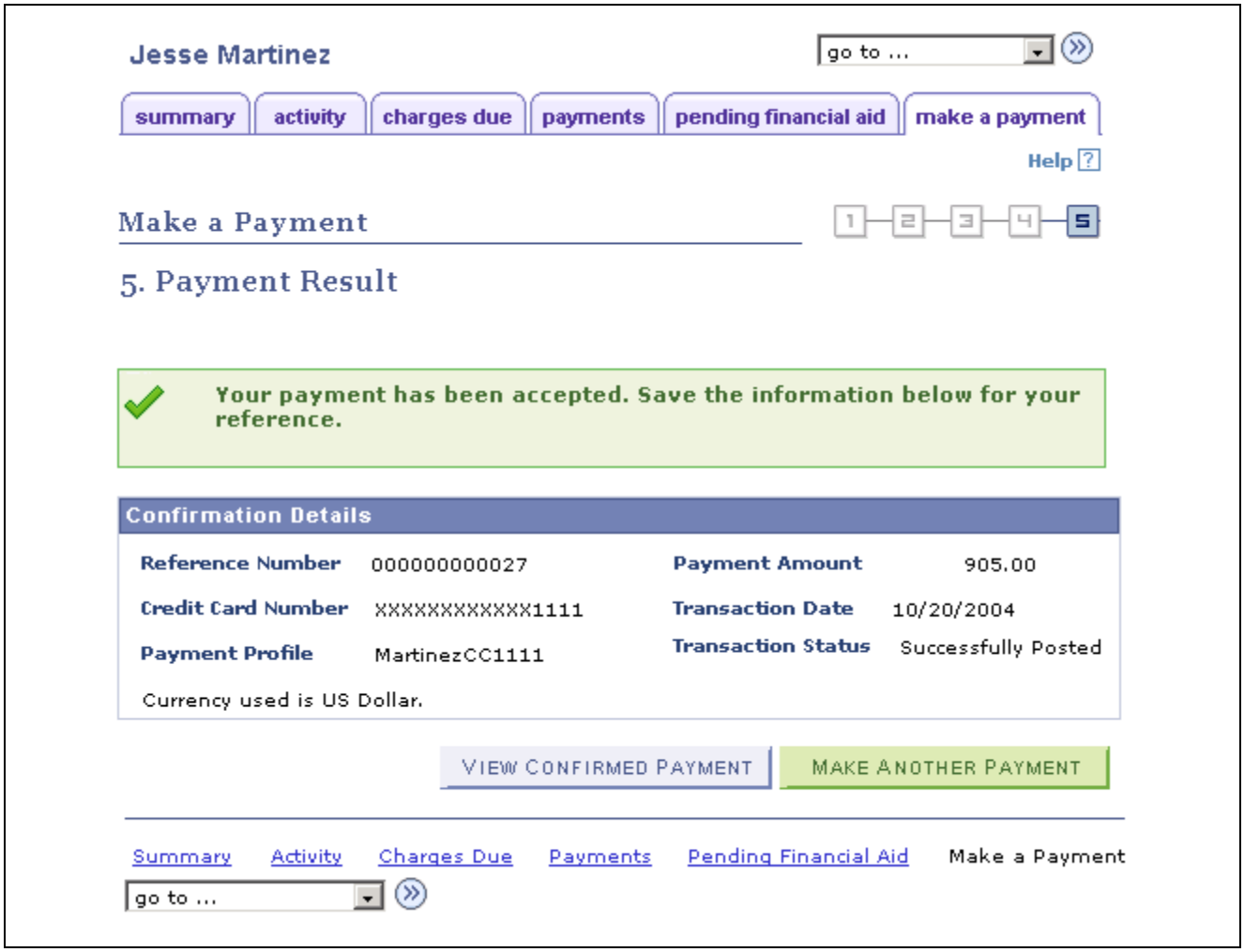
This page confirms what payments students would like to submit. The information displayed in the Payment Summary reflects whether or not students made payments by credit card or eCheck.

change payment amount Students click to change the payment amount.

change payment details Students click to change the payment details.

Viewing Successful Payment Results

Access the Make a Payment — Payment Result page.



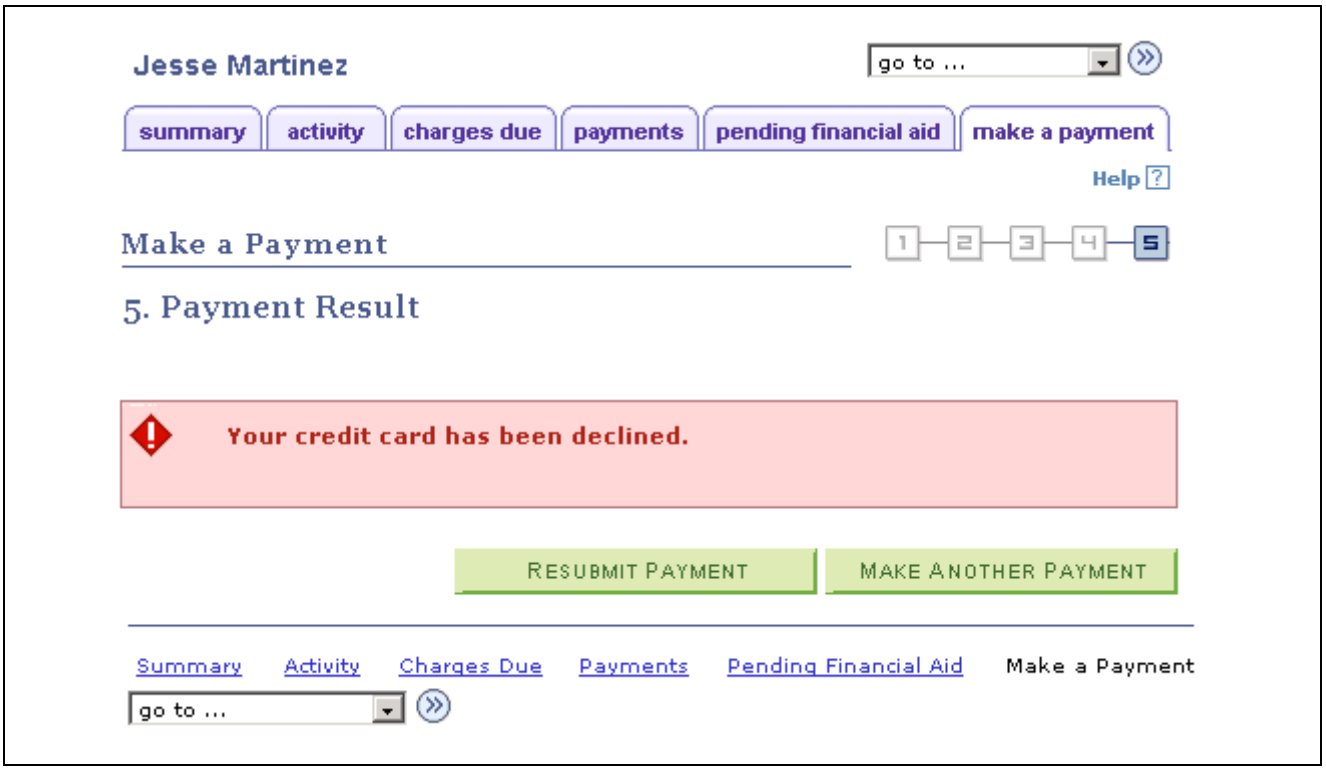
Make a Payment — Payment Result page (successful)

View Confirmed Payment Students click to go to payments tab and verify the recently submitted transaction. This is only available following successfully submitted transactions.

Make Another Payment Students click to start the make a payment process over from the beginning .

Viewing Declined Payment Results

Access the Make a Payment — Payment Result page.



Make a Payment — Payment Result page (declined)

Resubmit Payment Students click to review and edit the retained payment data. If students want to start all over, click Make Another Payment.

Make Another Payment Students click to begin the make a payment process from the beginning.

CHAPTER 10

Using Self Service Financial Aid

This chapter provides an overview of the of the self service application and discusses how to:

- Accept, decline, and reduce awards.
- Use administrative requests.
- Manage batch processing.
- Use administrative self service inquiry pages.
- View self service inquiry pages by aid year or award period.
- View student self service pages by aid year.
- View student self service pages by award period.

Understanding Financial Aid Self Service

Students can view their financial aid data by aid year or award period, and accept, decline and reduce awards. If your institution enters *Aid Year* in the View Summary By field on the Self Service Options page, the system displays data based on the aid year. If your institution enters *Award Period* in the View Summary By field on the Self Service Options page, the system displays the data by award period.

PeopleSoft Self Service provides two ways for students to access their financial aid data. To view financial aid, students can navigate to Self Service, Campus Finances, View Financial Aid or Self Service, Student Center and click the View Financial Aid link in the Finances group box on the Student Center page.

To accept and decline awards, students can navigate to Self Service, Campus Finances, Accept/Decline Awards or Self Service, Student Center and click the Accept/Decline Awards link in the Finances group box on the Student Center page.

See Also

Chapter 6, "Setting Up Self Service for Financial Aid," Setting Up Self Service Inquiry Options, page 37

Accepting, Declining, and Reducing Awards

This section discusses how students:

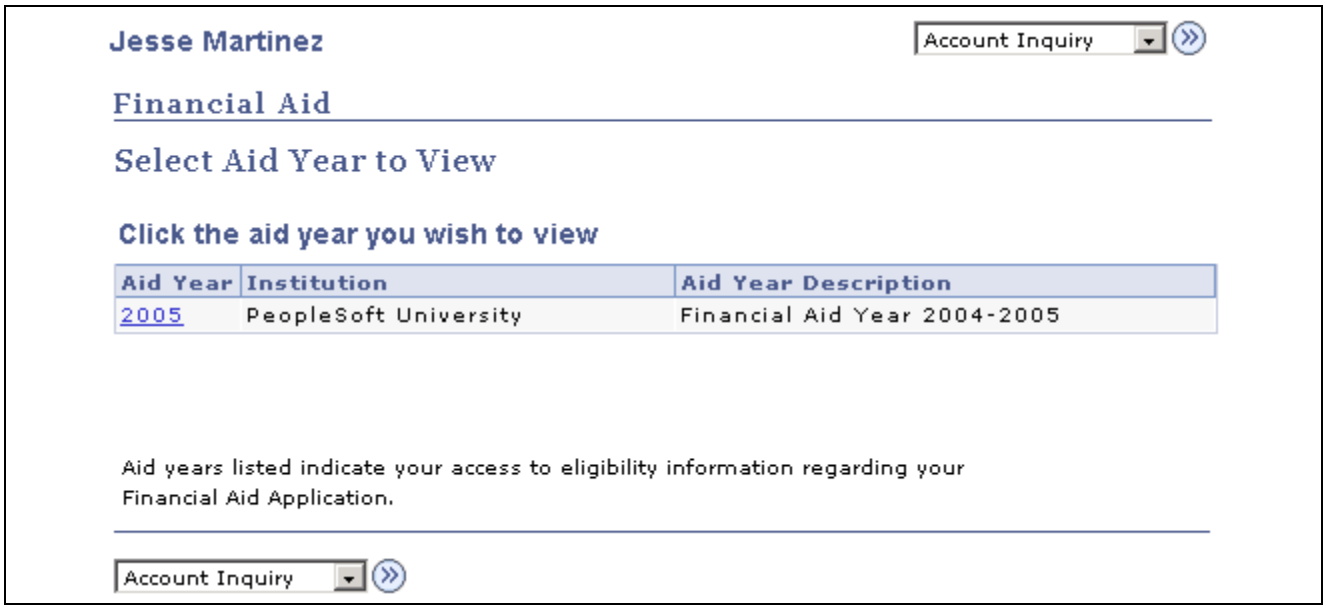
- Select an aid year.
- Accept, decline, and reduce awards using self service.
- View award detail.

Pages Used to Accept, Decline, and Reduce Awards

Page Name	Object Name	Navigation	Usage
Financial Aid – Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Select Aid Year to View	Access award acknowledgment for a particular aid year.
Financial Aid – Award Package	SS_FA_AWD_ACK	Self Service, Campus Finances, Accept/Decline Awards, Financial Aid – Award Package	Accept, decline, and reduce awards.
Financial Aid – Award Detail	SS_FA_AWD_DTL	Click the Award link on the Financial Aid – Award Package page.	View scheduled disbursements by term. Displays the type of award, date, term, and award amount.

Selecting an Aid Year

Access the Financial Aid – Select Aid Year to View page.



Financial Aid – Select Aid Year to View page

The system displays all aid year/institution combinations for which the student is in attendance. If the student is in attendance at more than one institution, you will not be able to restrict the view to a single institution or aid year.

If total aid is greater than zero and the Print option does not equal *Print,* the link for that year is disabled, and the system displays, "Award access not available." instead of the aid year description. If the Allow Access check box is clear on the Self Service Options page, the system displays, "No self service access for this aid year." instead of the aid year description. If the Award Access check box is clear on the Financial Aid Status page for this student, the system displays "Award not available."

The student selects the aid year for which he wants to accept, reduce, or decline awards. If you selected the Print Letter Option to *Print* in setup, the system displays all non-canceled awards for the student for the selected aid year.

If a student declines all of the awards and subsequently attempts to access self service award acknowledgment, the system does not activate the aid year for which the student declined all of the awards.

Accepting, Declining, and Reducing Awards Using Self Service

Access the Financial Aid – Award Package page.



Financial Aid – Award Package page

The first time the student accesses the Financial Aid - Award Package page, the system displays the status of the package as New Package. If there is no history of self service activity at this point, the system does not display a Previous Transactions link. However, if a student has submitted an award acknowledgment prior to this entry, the system displays an active Previous Transactions link.

The system displays the most current award package and a corresponding status. The date/time field displays the last time the award package was updated. Anytime there is access or action taken against the award data, the system initiates a date and time stamp.

To ensure the integrity of self service processing, the system applies the following rules:

1. An award with a disbursed balance greater than zero cannot be adjusted during self service activity. However, a student can modify awards with an authorized balance greater than zero.
2. If the FA Item Type self service action setup is specified as a reduction, the student can reduce awards in self service. In addition, as long as you have set up the Item Type reduction, there is no restriction to reduce awards with the following attributes: Professional Judgment, Need Override, Override, or Lock Flag based on FA Item Type self service action setup.
3. If an award uses a custom split, a student can accept or decline the award, but cannot reduce the amount.
4. A student cannot select both the Accept and Decline check boxes at the same time. The system clears or cancels one action or the other.
5. A student cannot increase the award amount above the offered amount.
6. A student cannot decline or reduce a loan award amount if the loan is in transmit status. In other words, students cannot adjust loans in transit.
7. When certain setup inconsistencies or data integrity conditions are encountered, the system may return a Rejected or Needs Review status. Changes are not posted. Further activity is suspended, and the student is instructed to meet with the financial aid counselor.
8. A counselor must re-offer a previously declined award before the student can accept the award.
9. A student cannot reduce the accept amount down to zero. Instead, the student must decline the award.
10. If the loan award allows for reductions based on the FA Item Type self service action setup, the system ensures that the Offered amount and the Accepted amount are the same once the award is processed.
11. The treatment of Subsidized /Unsubsidized Loan Relationship:

- A student can accept both the SUB and UNSUB.
- A student can accept the SUB and reduce the UNSUB.
- A student can accept the SUB and decline the UNSUB.
- A student cannot reduce the SUB and accept the UNSUB.
- A student cannot reduce the SUB and reduce the UNSUB.
- A student can reduce the SUB and decline the UNSUB.
- A student cannot decline the SUB and accept the UNSUB.
- A student cannot decline the SUB and reduce the UNSUB.
- A student can decline both the SUB and UNSUB simultaneously. The System automatically declines the UNSUB if the SUB is declined.
- A student can reduce the SUB when no UNSUB exists.
- A student can decline a SUB when no UNSUB exists.

Note. PeopleSoft recommends that you use the user-defined text delivered with this product to define awarding rules and instructions for your students. For example, if a student cannot reduce an award in self service, a clarification as to why the student cannot modify the award will be useful. Examples of user-defined text are “Award is disbursed.” or “Loan is in transit.”

Last Updated Indicates the date and time of the last activity.

Status

Note. The processing option you selected on the Awarding Options setup page affects the status. If you select Batch, the outcome is *Pending Update* until you run the batch process. Once you run the batch process, the outcome can be one of the following: *Successful, Successful with Adjustments, Revised Package, Rejected,* or *Needs Review.* If you select Real Time, the outcome is one of the following: *Successful, Successful with Adjustments, Rejected,* or *Needs Review.*

The values are as follows:

Needs Review: Indicates that the system cannot process one of the student's awards. The system does not post the changes. If the system finds errors while processing an award, the result is a *Needs Review* status. The system displays the awards as view only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

The following conditions are examples of why the results are in Needs Review status.

1. If the fiscal balance is below the submitted accepted or reduced amount
2. If the disbursement ID of the self service disbursement record does not match the system's disbursement IDs associated with the disbursement plan found in the corresponding award.
3. If the student reduces an award where the term limit contains cents, but the award remainder rule specifies first or last dollars.

New Package: Indicates that there is no previous self service activity and that the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the awards that are currently available.

Pending Update: Indicates that the student submitted the award acknowledgement. The student can revisit this page to see if the acknowledgement and/or changes are accepted. The student can still make changes in the existing package if the status is *Pending Update.* The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run.

Rejected: Indicates that the system cannot process the student's acknowledgment and/or adjustments. The system does not post the changes. If the system detects errors during initialization and setup, the result is a *Rejected* status. All awards are rejected. The system displays the awards as view only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

Revised Package: Once a student submits an award acknowledgment, this status indicates that the financial aid staff revised the student's financial aid package since the student last submitted a transaction. The student can accept, reduce, or decline any or all of the awards that are currently available.

Successful: Indicates that the system successfully processed the acknowledgement and/or changes submitted by the student.

Successful with Adjustment:: Indicates that the system successfully processed the student's award acknowledgment, but adjustments to one or more awards were made due to the student reducing an award below the minimum allowable amount. If the student reduced one or more awards below the minimum

amount allowed, the system adjusts the awards to the minimum limit amount and returns this status.

Award Click the name of the financial aid award to access the Financial Aid – Award Detail page. The link is only available on non-zero awards

Category Displays the type of financial aid award. The award category is based on the Financial Aid Type field on the FA Item Type 1 setup page.

Career Displays the student's academic career associated with the award. If the student has multiple careers, the system displays all awards from all careers.

Offered Displays the amount offered to the student for this award.

Accepted Displays the amount accepted by the student for this award or auto-accepted by the system as part of the packaging process. If reductions are permitted on the award—FA Item Type Self Service Actions option—then once the student clicks the Accept check box for this award, this field is open and available for reduction.

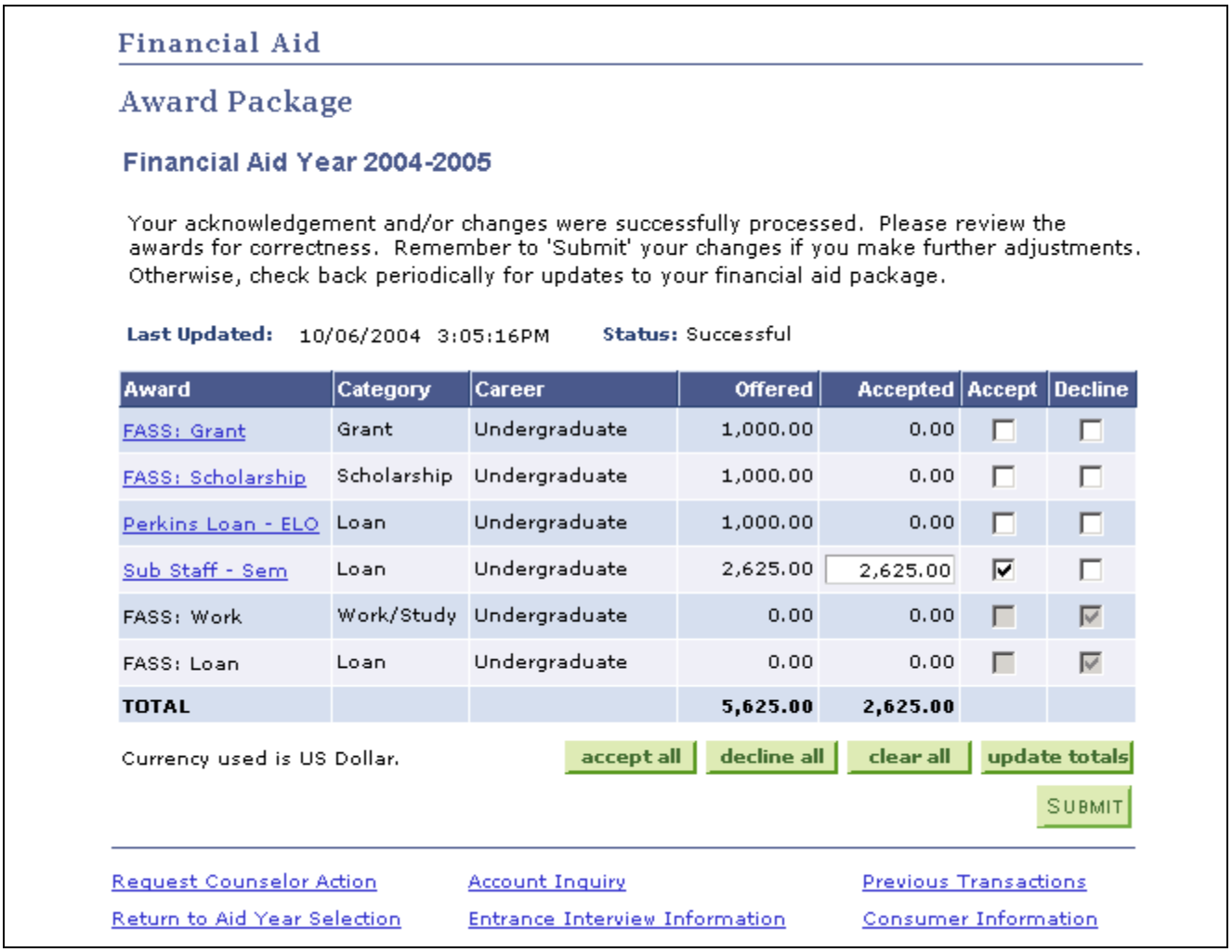
Accept Select to accept the award.

Note. In administrative packaging you can award a student an item type and set it automatically as *Offer/Accept.* If you set the award to Offer/Accept, the system automatically displays a check mark in the Accept check box on the self service Award Package page. If, for example, an administrator sets a work-study program award to *Offer,* the system clears the Accept check box giving the student the option to accept the award.

Decline Select to decline the award. Once this is selected, the system reduces the accepted amount to zero and displays the field as display only. If declines are not permitted on this award—FA Item Type Self Service Actions option—this field is not available to the student.

Example of How the System Does Not Display a Link on a Declined Award

When a student declines one or more awards while other awards are either in offered or accepted status, the system does not display a link for the declined award because there are no scheduled disbursements for that award. In the following example, the student declined the FASS: Work and FASS: Loan awards. These awards do not have a link to the Financial Aid – Award Detail page



Award Package example

accept all Click to accept all of the offered awards.

decline all Click to decline all of the offered awards.

clear all Click to clear the Accept and Decline check boxes.

update totals Click to update the totals.

Submit Click to submit award acknowledgment and/or change. When the student clicks the Submit button, they can then select Yes to continue with the submit or No to cancel the submit.

Note. The system does not require a student to make changes to the page. If the student clicks Submit without making changes to the package (accepting, declining, or reducing), the system displays the status as *Successful* in real time processing and *Pending Update* in batch processing.

Depending on the processing option you defined on the Awarding Options page, the system processes the acknowledgment as follows:

If you set the option to batch processing on the Awarding Options setup page, the system loads the current award package from the real tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system sets the student's transaction to *Pending Update* and records the current date and time. When you run the batch process, the system selects all transactions with a *Pending Update* status for processing. For each student selected, as long as the financial aid package has not been revised since the student submitted the award acknowledgment, the system checks each award in the student's package for any changes. It evaluates changed awards to ensure that award amounts and disbursement balances are correct and reductions do not fall below minimum amounts. The system processes all other awards in passive mode. After the batch validation process is complete, and if no errors were found, the system posts the data to the student's real award tables in the database.

If you set the option to real time, the system loads the current award package from the real award tables to a staging table. It saves the student's activity to the staging table when the student submits an award acknowledgment. The system evaluates the award activity and the resulting changes as it does in batch mode. The process verifies the Accept or Decline amount, and for award reductions, recalculates the scheduled disbursements. When all of the awards in the student's package are processed, and if no errors were found, the system posts the data to the student's real award tables in the database.

Note. Unlike administrative packaging where the packaging routine performs extensive edits to ensure the validity of an award, in self service, the system processes awards in passive mode and does not perform any federal edits or evaluate the student for eligibility or need criteria. The system performs a subset of edits on any award that is being reduced. Also, the system adjusts an award that has been reduced below minimum amounts established for the system.

Request Counselor Action This link permits the student to access the Request Counselor Action page to request a change in awarding, a meeting with a financial aid counselor, or to withdraw an aid application.

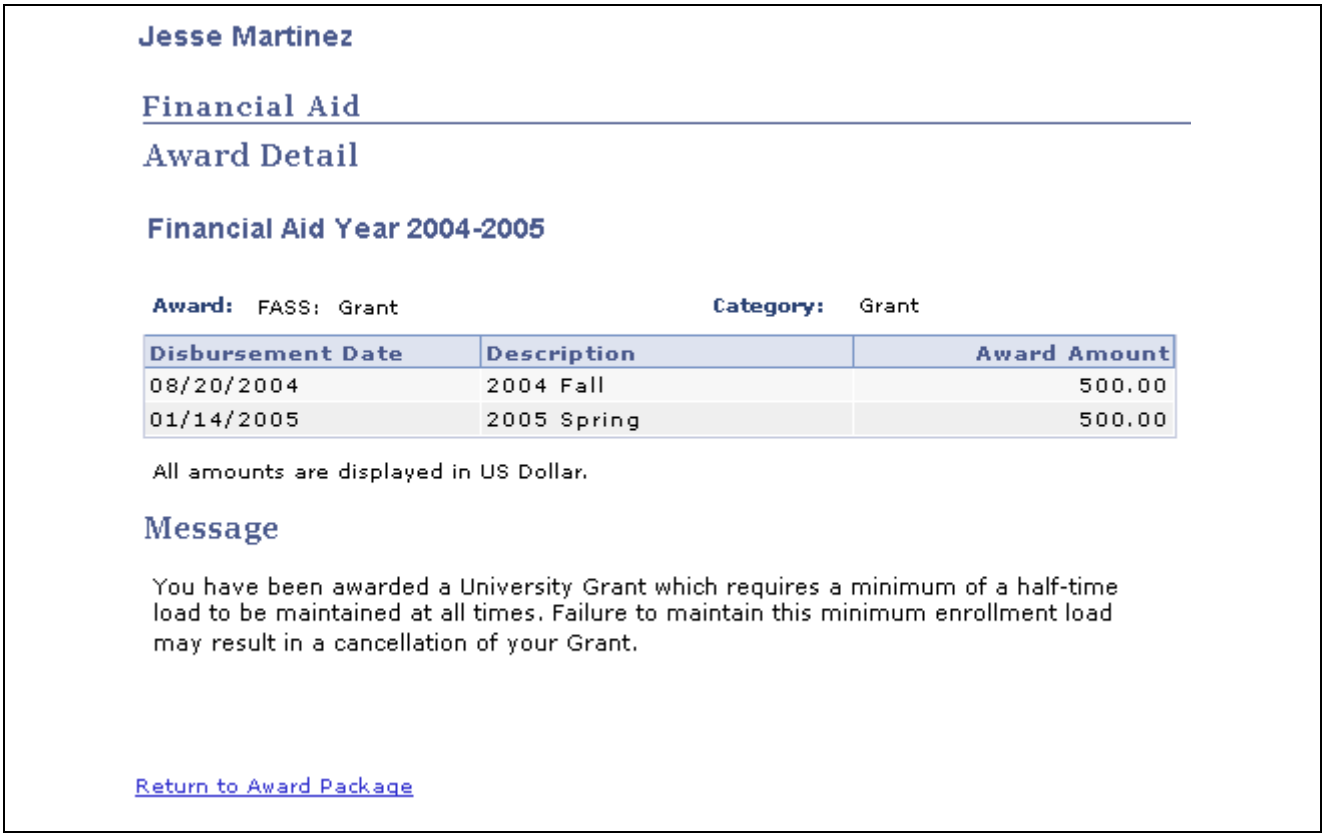
Account Inquiry This link permits the student to access the Account Summary page to make a payment or view account summary, activity, charges due, payments, and pending financial aid.

Previous Transactions This link permits the student to access the Financial Aid – Previous Transactions page to view sequence, date, time, and status of previous accept or decline transactions.

Consumer Information	This link permits the student to access your institution's student information site. This site may reflect awarding rights and responsibilities such as statement of educational purpose, truth-in-lending content, or other financial aid information
Return to Aid Year Selection	This link permits the student to return to the Financial Aid – Select Aid Year to View page.
Entrance Interview Information	This link permits the student to access your institution's entrance and exit interview site.

Viewing Award Detail

Access the Financial Aid – Award Detail page.



Financial Aid – Award Detail page

Award	Displays the name of the financial aid award.
Category	Displays the type of financial aid award. An award's category is based on the Financial Aid Type field on the FA Item Type 1 page.
Disbursement Date	Displays the scheduled disbursement date.
Description	Displays an instructional accounting period.
Award Amount	Displays the amount of the award based on award status. If in Offer status, the system displays the offered amount. If in Accept status, it displays the accepted amount.

Messages Displays information about the student's award. The award messages are defined on the Setting Up Award Messages page in administrative packaging. These are linked to the Award Message field on the FA Item Type 3 page. When a student has been awarded this item type, the system displays this award message on the self service Financial Aid – Award Detail page. The system displays other messages if the loan award is in transit status or if the award has been reduced and is pending processing.

Return to Award Package Click to return to the Financial Aid – Award Package page.

Using Administrative Requests

This section provides an overview and discusses how to define administrative requests, known to the student as Request Counselor Action.

Understanding Administrative Requests

Administrative requests refer to any comment or request for action by students regarding their financial aid package. An example of a request can be to increase the total aid package, replace loan awards with scholarships and grants, or cancel the financial aid application. A student can file a request for counselor action without taking any action toward accepting, reducing, or declining all or part of the financial aid package.

The Request Counselor Action link on the Financial Aid – Award Package page takes the student to the data entry page for the administrative request. The system displays the highest sequenced record. If there are no existing requests, or if the highest sequenced request exists with a status of *Closed*, the system creates a new request for the student. The Request Type defaults to *Change Request* with a status of *Open.* The student cannot change the status but can cancel or close the current request. The status remains open until either a counselor or the student closes the request. If a counselor closes the request, the counselor can enter the action taken. If a student closes the request, the system sets the action to *None*.

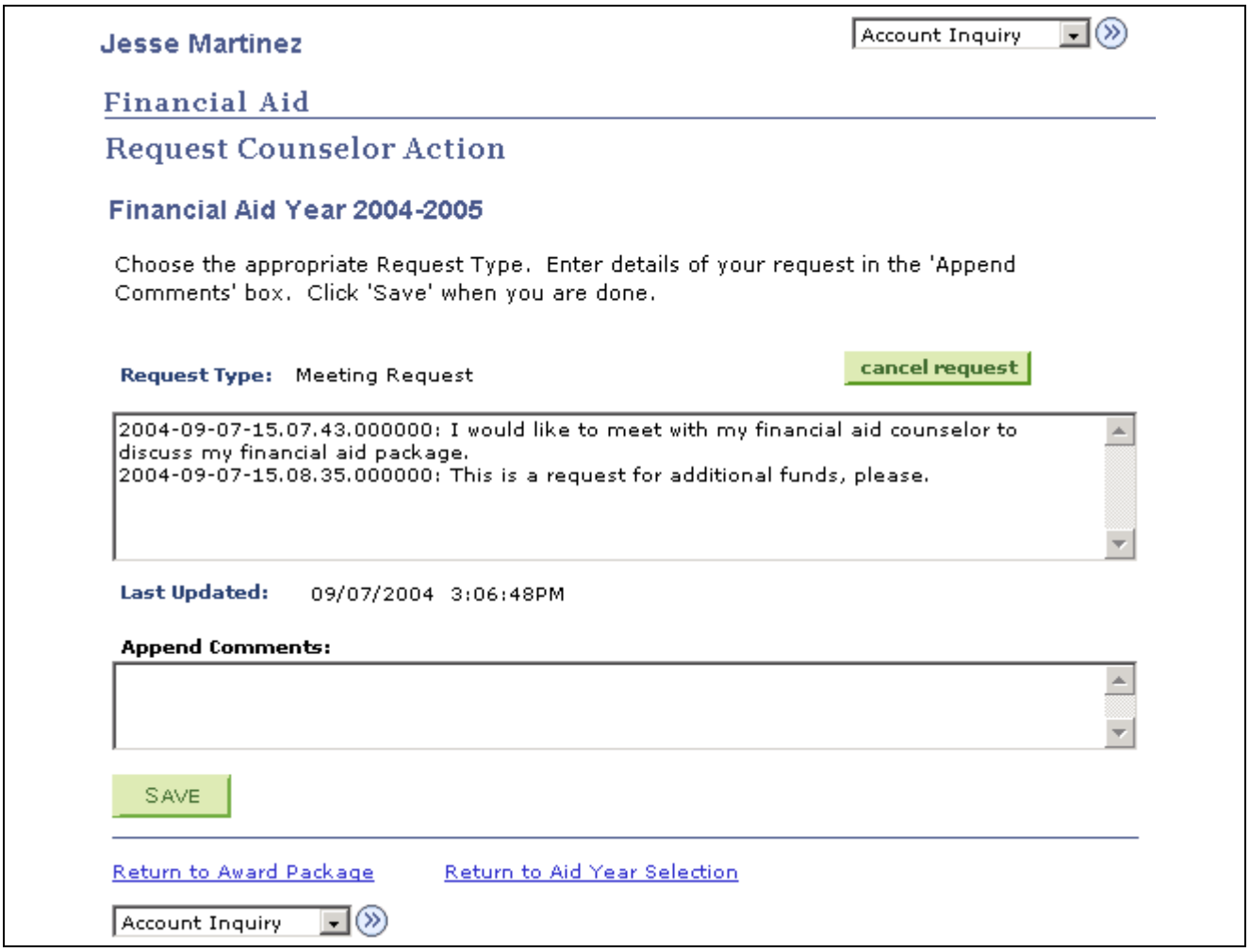
If there is an outstanding request with a status of *Open* or *Pending,* the system displays the current request to the student. The student can add comments or close the current request. The student can also view prior requests if there is more than one existing request.

Page Used to Initiate and Update Administrative Requests

Page Name	Object Name	Navigation	Usage
Financial Aid – Request Counselor Action	SS_FA_AWD_REQ	Click the Request Counselor Action link on the Financial Aid – Award Package page.	Request a change, meeting, or withdraw aid application.

Defining Administrative Requests

Access the Financial Aid – Request Counselor Action page.



Financial Aid – Request Counselor Action page

Request Type Select one of the following options:

Change Request: Indicates that the student requests to be repackaged or reviewed based on specified criteria or changed circumstances.

Meeting Request: Indicates the student requests a meeting with a counselor.

Withdraw Aid Application: Indicates the student requests to cancel his financial aid package due to withdrawing from school.

New Request The system creates a new request if there are no existing requests or if the highest sequenced request exists with a status of *Closed*.

Last Updated Indicates date and time of last activity. Tracks creation of and updates to the request.

Append Comments Enter details about the request.

Cancel Request Click to cancel an existing request.

Return to Award Package Click to return to the Financial Aid – Award Package page.

Return to Aid Year Selection Click to return to the Financial Aid – Select Aid Year to View page.

Managing Batch Processing

This section provides an overview and discusses how to process self service awards.

Understanding Managing Batch Processing

If you selected batch processing on the Awarding Options setup page, you must run batch processing to update the *Pending Update* status of the student's package. When you run the batch process, and if no errors are detected while processing the student's transaction, the system posts the data from the staging tables to the real award tables in the database. When the student returns to the Award Package page, the outcome of the batch process results in one of the following statuses: *Successful, Successful with Adjustments, Revised Package, Rejected*, or *Needs Review*. The student may need to meet with a financial aid counselor if the status is either *Rejected* or *Needs Review*. Consequently, the administrator must determine why the status is either *Needs Review* or *Rejected*, fix the condition, re-award the student as necessary, and rerun the batch process. If the status is *Revised Package*, the student may need to re-submit his changes.

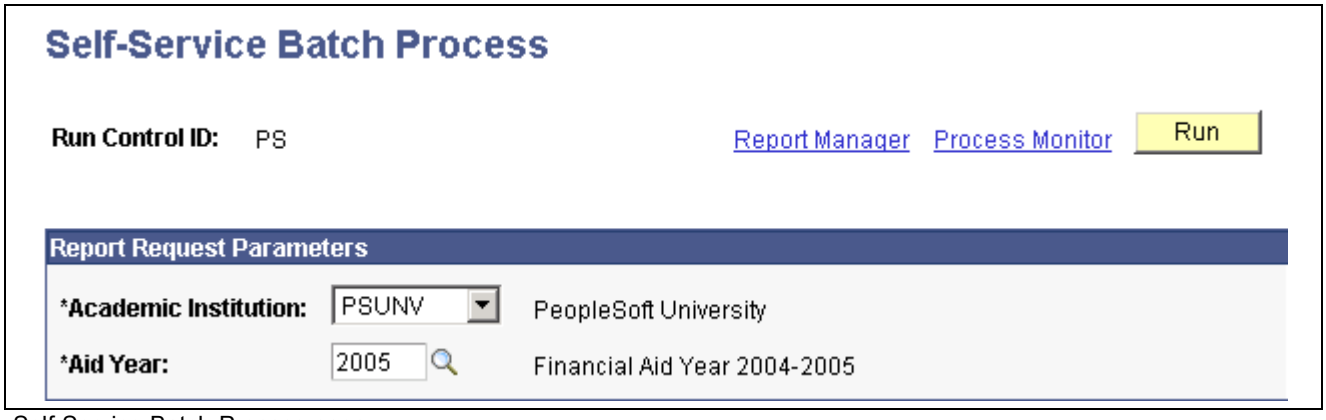
If you set the Background Errors Allowed field to 1 or some other integer amount on the Financial Aid Defaults page (Design Student Administration, Design Financial Aid1, Setup F-K, Installation Defaults-Fin Aid), the system ends the batch process when it encounters a single student or multiple students who receive either a *Needs Review* or *Rejected* status based on the tolerance.

Page Used to Process Batch Self Service

Page Name	Object Name	Navigation	Usage
Self Service Batch Process	RUNCTL_FA_SS_AWARD	Financial Aid, Awards, Self Service Awarding, Post Self Service Awards	Update self service award tables.

Processing Self Service Awards

Access the Self Service Batch Process page.



Self-Service Batch Process page

Click Run to run the FAPPKSSB process.

Using Administrative Self Service Inquiry Pages

This section discusses how to:

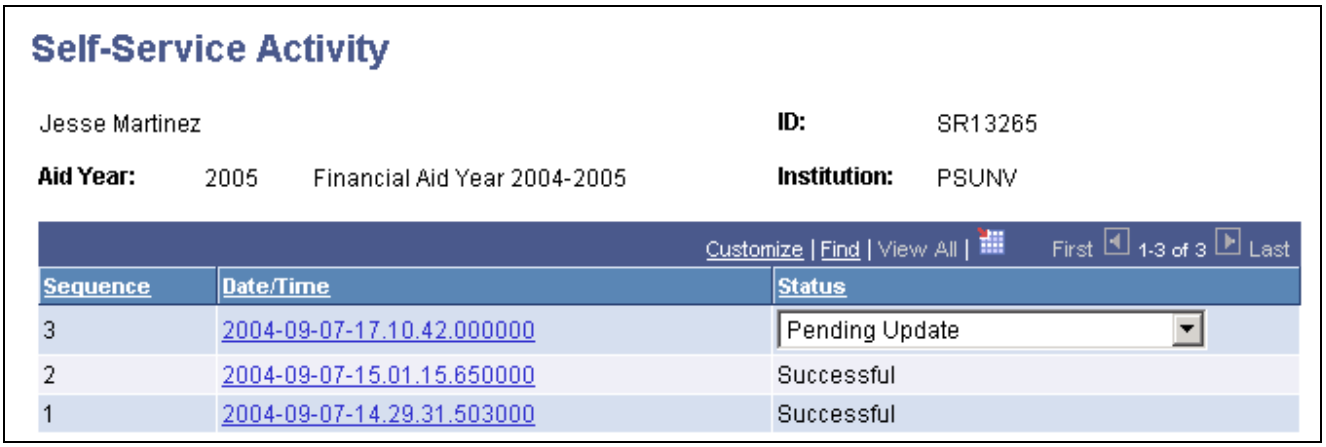
- Use self service activity.
- View self service awarding activity detail.
- Remove a student in needs review or rejected status.
- View self service batch summary.
- View self service awarding batch detail.
- View rejected or needs review self service awarding activity detail.
- View self service awarding batch error.
- View self service requests.
- View self service by status.

Pages Used to View Administrative Self Service Activity

Page Name	Object Name	Navigation	Usage
Self Service Activity	FA_SS_AWD_ACT_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Activity, Self Service Activity	Identify sequential outcomes of submit activity that occurred in the student's self service record.
Self Service Awarding Activity Detail	FA_SS_AWD_INQ_SEC	Click the link below the Date/Time field on the Self Service Activity page.	View submitted awards and the award status for each career's awards. Used for historical or audit purposes.
Self Service Batch Summary	FA_SS_BATCH_INQ	Financial Aid, Awards, Self Service Awarding, View Batch Summary, Self Service Batch Summary	View the total number of students processed in a batch and a breakdown of the number of students processed by self service status
Self Service Awarding Batch Detail	FA_SS_BATCH_DTL1	Click the numeric link with the corresponding status on the Self Service Batch Summary page	View self service awarding batch detail.
Self Service Awarding Batch Activity Detail	FA_SS_AWD_INQ_SEC2	Click the student ID link on the Self Service Awarding Batch Detail page.	View a specific student's self service awarding activity detail as part of a batch run.
Self Service Awarding Batch Error	FA_SS_BATCH_ERROR	Click the Error Code link on the Self Service Awarding Batch Detail page.	View the error code with the corresponding message.
Request Counselor Action	FA_SS_AWD_REQ_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Requests, Request Counselor Action	Used by financial aid personnel to process the administrative requests submitted by the students.
Self Service Activity by Status	FA_SS_AWD_ACT_INQ	Financial Aid, Awards, Self Service Awarding, View Self Service Status, Self Service Activity by Status	Identify students by self service status for which additional action might be warranted.

Using Self Service Activity

Access the Self Service Activity page.



Self Service Activity page

Sequence

Indicates the chronological order of the student's self service activity. You can update the student's self service status using the Status field that corresponds with the highest sequence. For example, if the status is *Needs Review* or *Rejected*, fix the underlying problem, repackage as necessary, and change the status.

Date/Time

Displays the date and time of the self service action.

Click a link to access the Self Service Awarding Activity Detail page.

Status

Note. The processing option you selected on the Awarding Options setup page affects the status. If you select Batch, the outcome is Pending Update until you run the batch process. Once you run the batch process, the outcome can be one of the following: *Successful, Successful w/Adjustments, Revised Package, Rejected*, or *Needs Review*. If you select Real Time, the outcome is one of the following: *Successful, Successful with Adjustments, Rejected*, or *Needs Review*.

The values are as follows:

Needs Review: Indicates that the system cannot process one of the student's awards. The system does not post the changes. If the system finds errors while processing an award, the result is a *Needs Review* status. The system displays the awards as view only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

New Package: Indicates that there is no previous self service activity and that the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the awards that are currently available.

Pending Update: Indicates that the student submitted the award acknowledgement. The student can revisit this page to see if the acknowledgement and/or changes are accepted. The student can still make changes in his existing package if the status is *Pending Update*. The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run.

Rejected: Indicates that the system cannot process the student's acknowledgment and/or adjustments. The system does not post the changes. If the system detects errors during initialization and setup, the result is a Rejected status. All awards are rejected. The system displays the awards as view only

and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

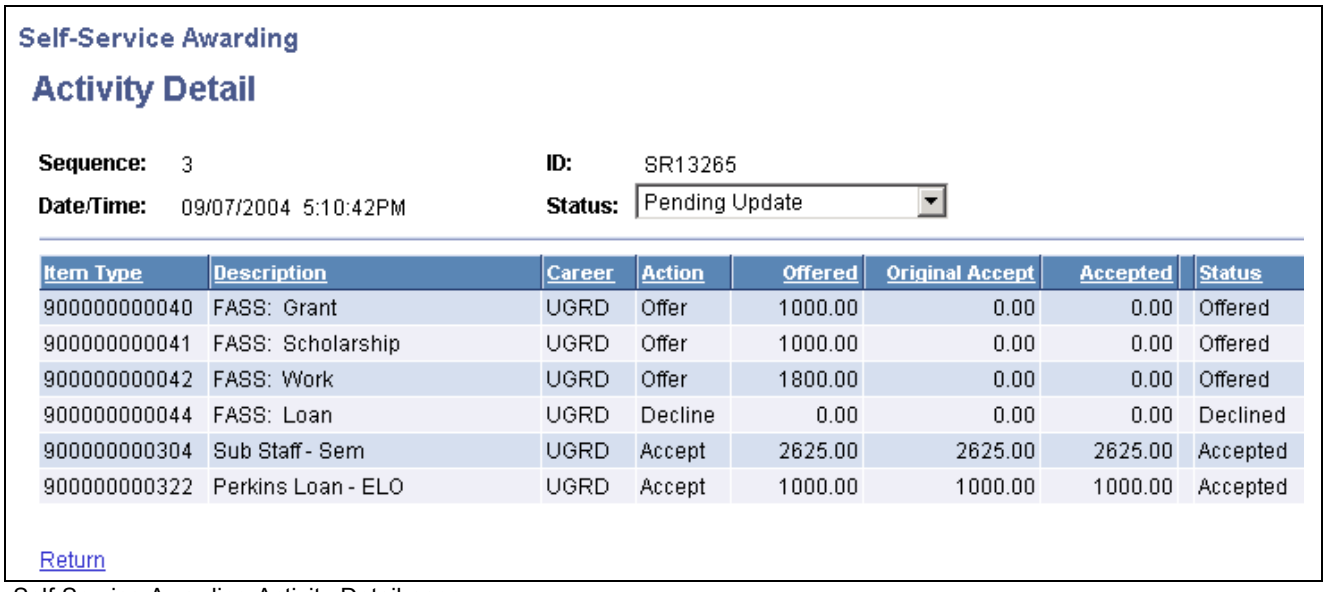
Revised Package: Once a student submits an award acknowledgment, this status indicates that the financial aid staff revised the student's financial aid package since the student last submitted a transaction. The student can accept, reduce, or decline any or all of the awards that are currently available.

Successful: Indicates that the system successfully processed the acknowledgement and/or changes submitted by the student.

Successful with Adjustment: Indicates that the system successfully processed the student's award acknowledgment, but made adjustments to one or more awards as a result of the student reducing an award below the minimum allowable amount. If the student reduced one or more awards below the minimum amount allowed, the system adjusts the awards to the minimum amount and returns this status.

Viewing Self Service Awarding Activity Detail

Access the Self Service Awarding Activity Detail page.



Item Type	Description	Career	Action	Offered	Original Accept	Accepted	Status
900000000040	FASS: Grant	UGRD	Offer	1000.00	0.00	0.00	Offered
900000000041	FASS: Scholarship	UGRD	Offer	1000.00	0.00	0.00	Offered
900000000042	FASS: Work	UGRD	Offer	1800.00	0.00	0.00	Offered
900000000044	FASS: Loan	UGRD	Decline	0.00	0.00	0.00	Declined
900000000304	Sub Staff - Sem	UGRD	Accept	2625.00	2625.00	2625.00	Accepted
900000000322	Perkins Loan - ELO	UGRD	Accept	1000.00	1000.00	1000.00	Accepted

Self Service Awarding Activity Detail page

Use this page to view a student's award amounts and award statuses that resulted from a self service award acknowledgment submission.

If the system encountered an error during real time processing, the Error link is available next to the status for the award that did not pass validation or posting. When you click the link, the system displays the message text for the error code.

Removing a Student in Needs Review or Rejected Status

If the self service transaction resulted in a Needs Review or Rejected status, access the Self Service Activity page. You will notice that you can update the status for the most current transaction. If you are processing in real time, click the date/time stamp to view the Activity Detail page. If available, click Error to determine why the system set the status to *Needs Review* or *Rejected*.

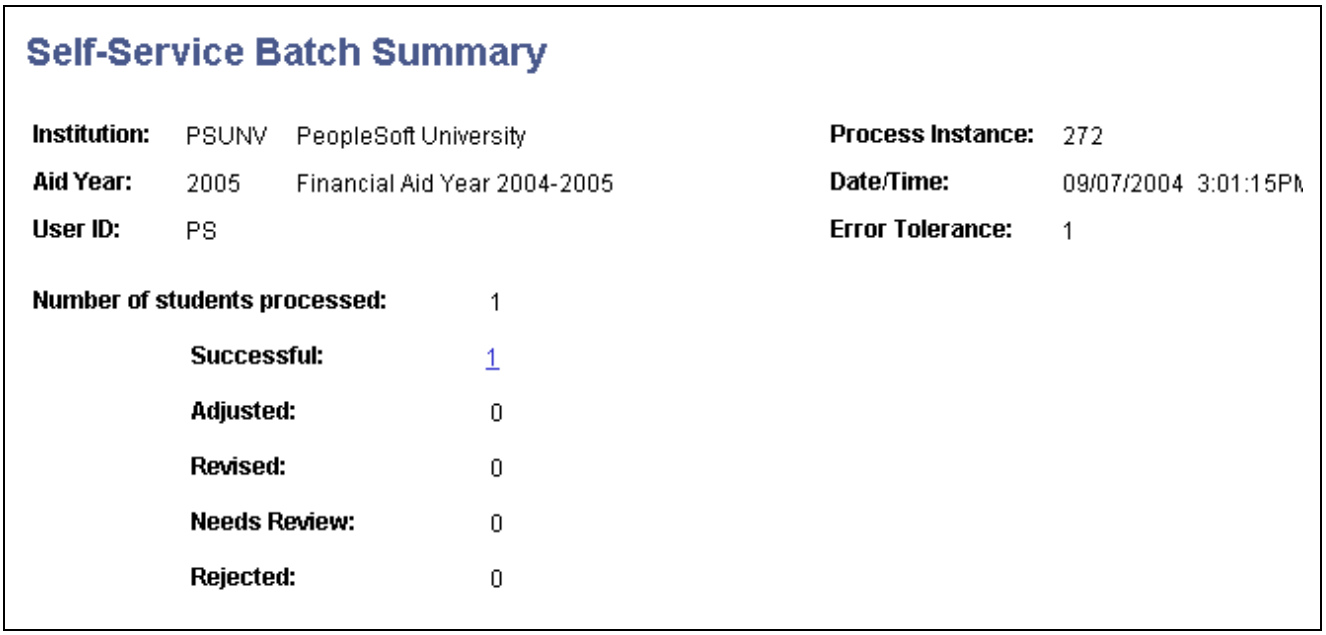
If the error was caused by setup data, adjust the setup data and set the status to *Pending Update* on the Self Service Activity page. Instruct the student to submit the acknowledgement again.

If the error was caused by award edits or the error link is unavailable, you will need to repackage the student. This sets the self service status to *Revised Package* the next time the student accesses the self service page. Instruct the student to submit the acknowledgement again.

If you are processing in batch mode, access the Batch Summary page. From there, click the numeric link to access students with a *Rejected* or *Needs Review* status. Click the error code link to determine the error. Once you have resolved the problem, access the Self Service Activity page and set the status to *Pending Update*. You will need to run the batch process again.

Viewing Self Service Batch Summary

Access the Self Service Batch Summary page.



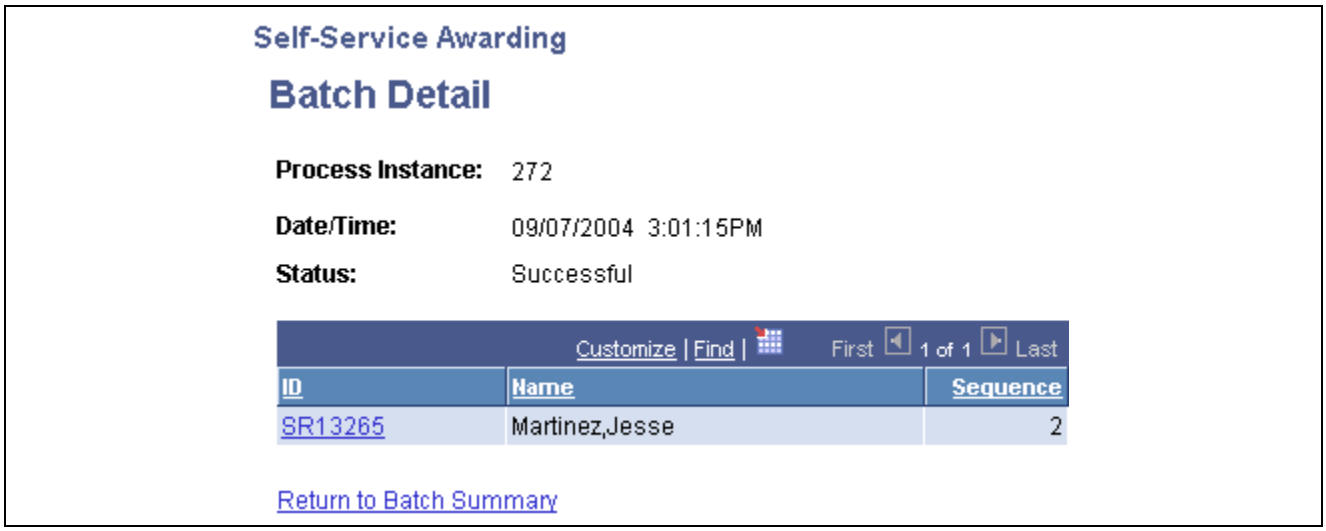
Self-Service Batch Summary page

The system stores the date and time the batch process was run as well as the operator ID. It records the number of students processed and the number of students by self service status. You can click the numeric link to identify the students with the corresponding status. If you set the Background Errors Allowed field to 1 on the Financial Aid Defaults page, the system ends the batch process when it encounters a single student who receives either a *Needs Review* or *Rejected* status.

The system also stores student IDs for each of the students processed. The sequence number for the corresponding self service activity record (SS_FA_STDNT_HDR) is stored as a cross- reference. The system stores the item type, academic career, and error code that caused the package to fail (Rejected or Needs Review). Once the system detects an error condition, the package is set to *Rejected* or *Needs Review* without having to process succeeding awards in the package. If the error is a data setup problem, then the system leaves the item type blank and only populates the error code field. The administrator can review the package that resulted in either the *Rejected* or *Needs Review* status.

Viewing Self Service Awarding Batch Detail

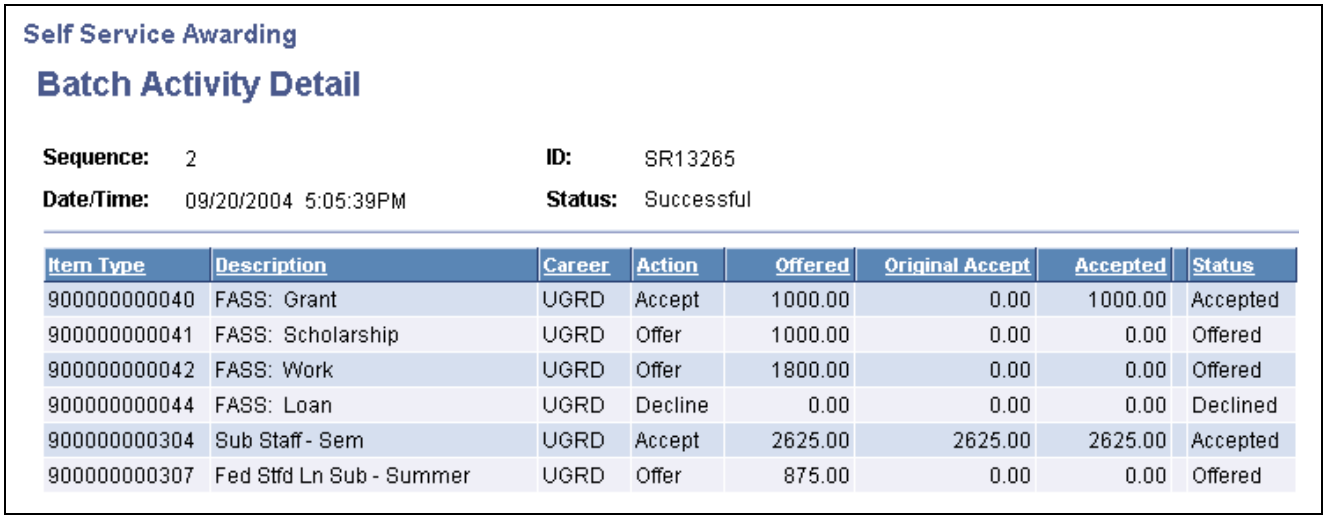
Access the Self Service Awarding Batch Detail page.



Self-Service Awarding Batch Detail page

Viewing Rejected or Needs Review Self Service Awarding Activity Detail

Access the Self Service Awarding Batch Activity Detail page.

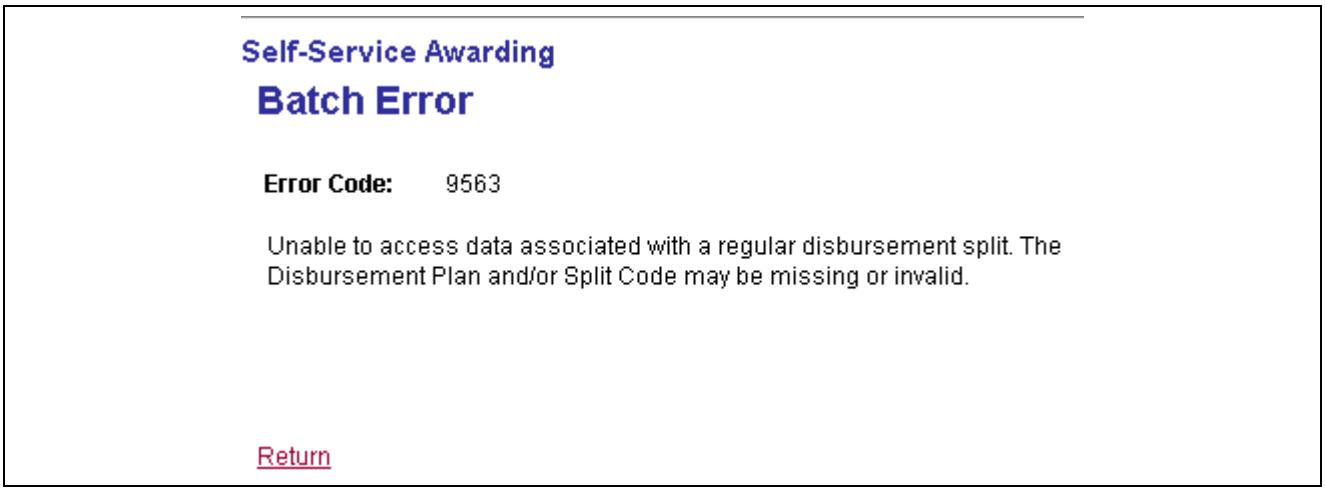


Item Type	Description	Career	Action	Offered	Original Accept	Accepted	Status
900000000040	FASS: Grant	UGRD	Accept	1000.00	0.00	1000.00	Accepted
900000000041	FASS: Scholarship	UGRD	Offer	1000.00	0.00	0.00	Offered
900000000042	FASS: Work	UGRD	Offer	1800.00	0.00	0.00	Offered
900000000044	FASS: Loan	UGRD	Decline	0.00	0.00	0.00	Declined
900000000304	Sub Staff - Sem	UGRD	Accept	2625.00	2625.00	2625.00	Accepted
900000000307	Fed Stfd Ln Sub - Summer	UGRD	Offer	875.00	0.00	0.00	Offered

Self Service Awarding Batch Activity Detail page

Viewing Self Service Awarding Batch Error

Access the Self Service Awarding Batch Error page.



Self-Service Awarding Batch Error page

Use this page to view the error code with the corresponding message.

Viewing Self Service Requests

Access the Administrative Requests page.



Request Counselor Action page

Use this page to process administrative requests submitted by the student.

Seq Nbr(sequence number) Indicates the chronological order of the student's self service activity.

Request Type Indicates the student requested one of the following:

Change Request, Meeting Request, or *Withdraw Application.*

User ID Indicates the person who performed the action.

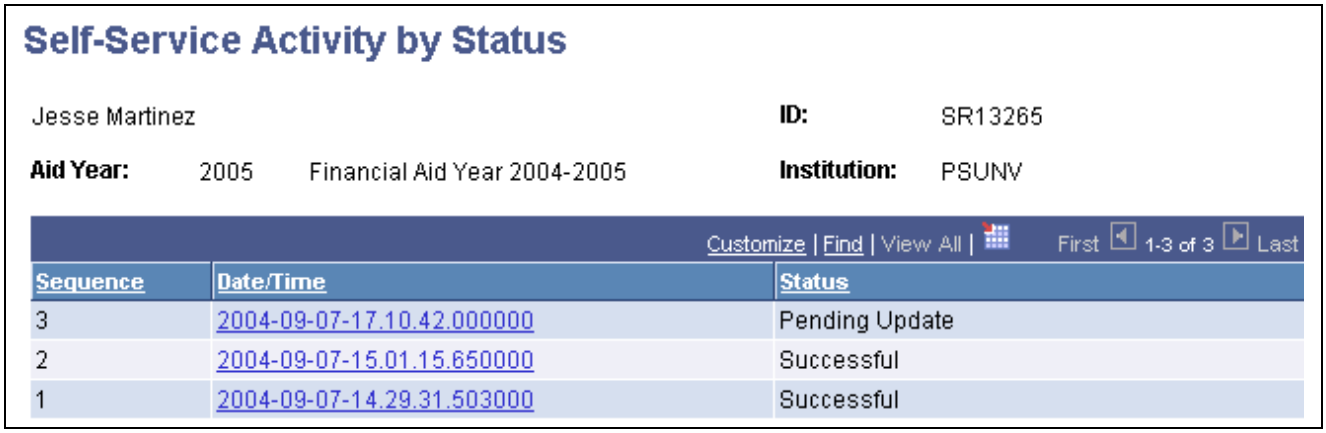
Status Select one of the following options: *Canceled, Closed, Open, Pending,* or *Updated.*

Action Taken Select one of the following options: *Cancel Aid, Meeting, No Action,* or *Repackage.*

Viewing Self Service Activity by Status

You can access Self Service Activity by specifying a particular status in the search dialogue page. The system lists all students with the current transaction status that you requested. Select the student you want to review.

Access the Self Service Activity by Status page.



Self-Service Activity by Status page

Click the link below the Date/Time field to view the Self Service Awarding Activity Detail page.

Viewing Student Self Service Pages by Aid Year

This section provides an overview and discusses how to:

- Select an aid year to view.
- View financial aid eligibility by aid year.
- View estimated financial aid budget by aid year.
- View expected family contribution by aid year.
- Select a career to view by aid year.
- View a detailed summary of financial aid by aid year.
- View loan application information by aid year.
- View financial aid loan status information by aid year.
- View declined awards by aid year.
- View canceled awards by aid year.
- View scheduled disbursements by aid year.

Understanding Viewing Self Service Inquiry Pages by Aid Year or Award Period

In the financial aid self service inquiry pages, students can view their financial aid data by aid year or award period. If your institution enters *Aid Year* in the View Data By field on the Inquiry Options page, the system displays data based on the aid year. If your institution enters *Award Period* in the View Data By field on the Inquiry Options page, the system displays the data by award period.

See Also

Chapter 6, "Setting Up Self Service for Financial Aid," Understanding Self Service for Financial Aid, page 37

Chapter 6, "Setting Up Self Service for Financial Aid," Defining Self Service Options, page 38

Pages Used to View Student Self Service Pages by Aid Year

Page Name	Object Name	Navigation	Usage
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Financial Aid – Select Aid Year to View	Select an aid year to view.
Financial Aid – Award Summary	SS_FA_AWD_SUMM_ALL	Click the Aid Year link on the Financial Aid – Select Aid Year to View page	View a detailed summary of financial aid by aid year. This includes the type of award and the offered and accepted amounts for the aid year and terms within the aid year.
Financial Aid - Financial Aid Eligibility	SS_FA_AY_SUMMARY	Click the Financial Aid Eligibilitylink on the Financial Aid – Award Summary page.	View financial aid eligibility by aid year. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
Financial Aid – Estimated Financial Aid Budget	SS_FA_COA	Click the Estimated Financial Aid Budget amount link on the Financial Aid - Financial Aid Eligibility page.	View estimated financial aid budget by aid year.
Financial Aid - Expected Family Contribution	SS_FA_EFC_SUMMARY	Click the Expected Family Contribution amount link on the Financial Aid – Financial Aid Eligibility page.	View expected family contribution by aid year for both parent and student.
Financial Aid - Select Career to View	SS_FA_AY_CAR_SEL	Click the Total Aid amount link on the Financial Aid - Financial Aid Eligibility page.	Select a career to view by aid year.

Page Name	Object Name	Navigation	Usage
Financial Aid - Loan Application Information	SS_FA_LOAN_DETAIL	Click the Loan Application Information link on the Financial Aid - Award Summary page.	View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.
Financial Aid - Declined Awards	SS_FA_AWD_ALL_CD	Click the View Declined Awards link on the Financial Aid - Award Summary page.	View declined awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Canceled Awards	SS_FA_AWD_ALL_CD	Click the View Canceled Awards link on the Financial Aid - Award Summary page	View canceled awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the View Scheduled Disbursement Dates link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term.

Selecting an Aid Year to View

Access the Financial Aid - Select Aid Year to View page.



Financial Aid – Select Aid Year to View page

The system displays all the aid years for which the student has been aid year activated on this page. If the estimated financial aid budget, expected family contribution, and total aid amounts for an aid year are all zero, the link for that year is disabled, and the system displays, "No financial aid data available." instead of the aid year description. If the self service options for an aid year have not been set up, the link for that year is disabled, and the system displays, "Aid Year not set up for self service." instead of the aid year description.

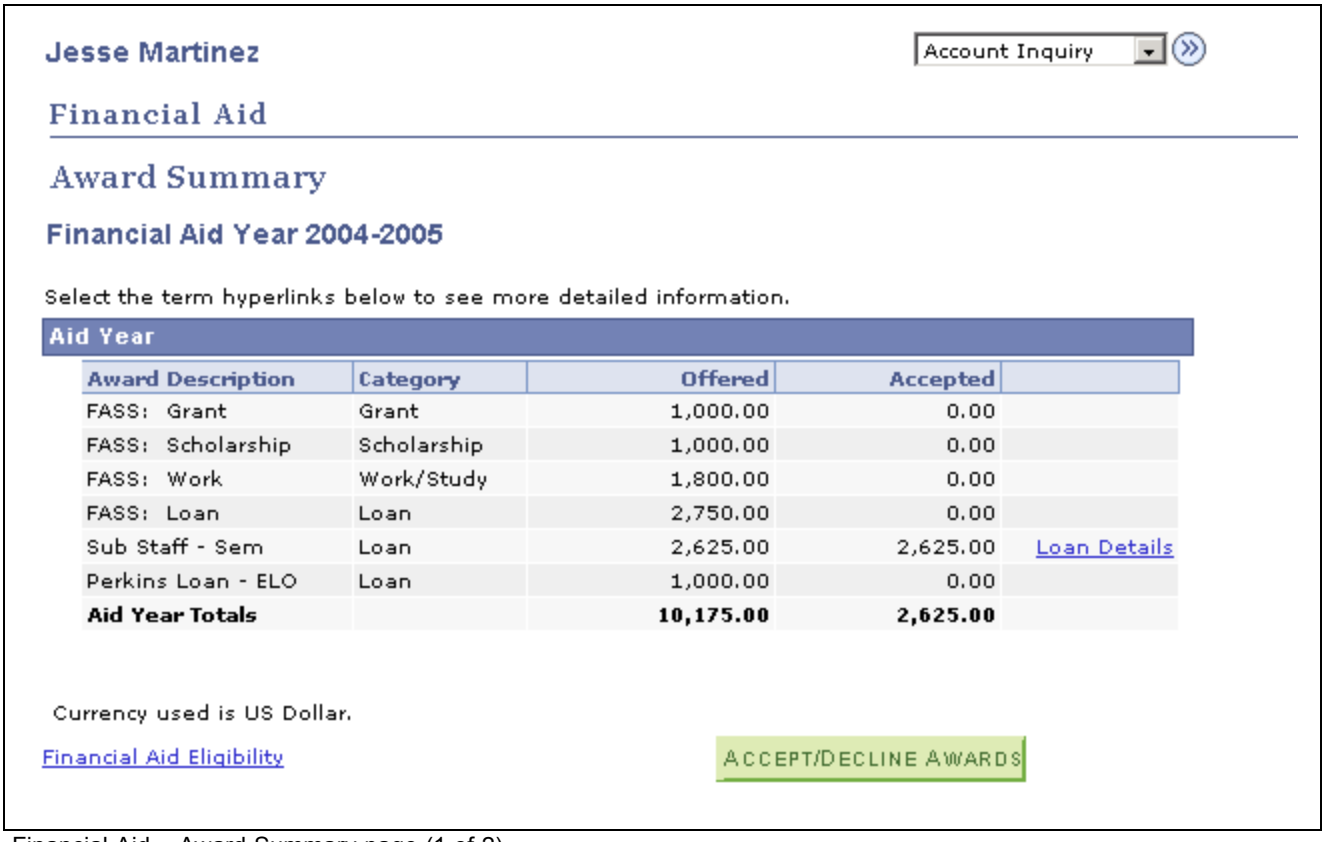
If the Allow Access check box is clear on the self service options page, the system displays, "No self service access for this aid year." If the Inquiry Access check box is clear on the Financial Aid Status page for this student, the system displays "Inquiry access denied."

Students select the aid year they want to view. If students have aid for more than one career in the aid year or award period, this link takes them to the Financial Aid - Select Career to View page; otherwise, it goes directly to the Financial Aid - Award Summary page.

Note. If a student does not have awards or if the Award Detail check box on the Self Service Options page is clear, the system displays the Financial Aid - Self Service Links page.

Viewing a Detailed Summary of Financial Aid by Aid Year

Access the Financial Aid – Award Summary page.



Financial Aid – Award Summary page (1 of 2)



Terms

View 2003 Spring

Award	Offered	Accepted
FASS: Grant	500.00	500.00 USD
FASS: Loan	4,000.00	0.00
Sub Staff - Sem	1,050.00	1,050.00
Perkins Loan - ELO	2,000.00	2,000.00
Term Totals	**7,550.00**	**3,550.00** USD

View 2002 Fall

Award	Offered	Accepted
FASS: Grant	500.00	500.00 USD
FASS: Loan	4,000.00	0.00
Sub Staff - Sem	1,050.00	1,050.00
Perkins Loan - ELO	2,000.00	2,000.00
Term Totals	**7,550.00**	**3,550.00** USD

Financial Aid Summary Accept/Decline Awards Return to Aid Year Selection

Financial Aid – Award Summary page (2 of 2)

Loan Details Click to access the Financial Aid – Loan Application Information page to view loan status, loan amount, loan fee, net amount, and activity date.

Financial Aid Eligibility Click to access the Financial Aid – Financial Aid Eligibility page to view estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need. The name of this link is user-defined.

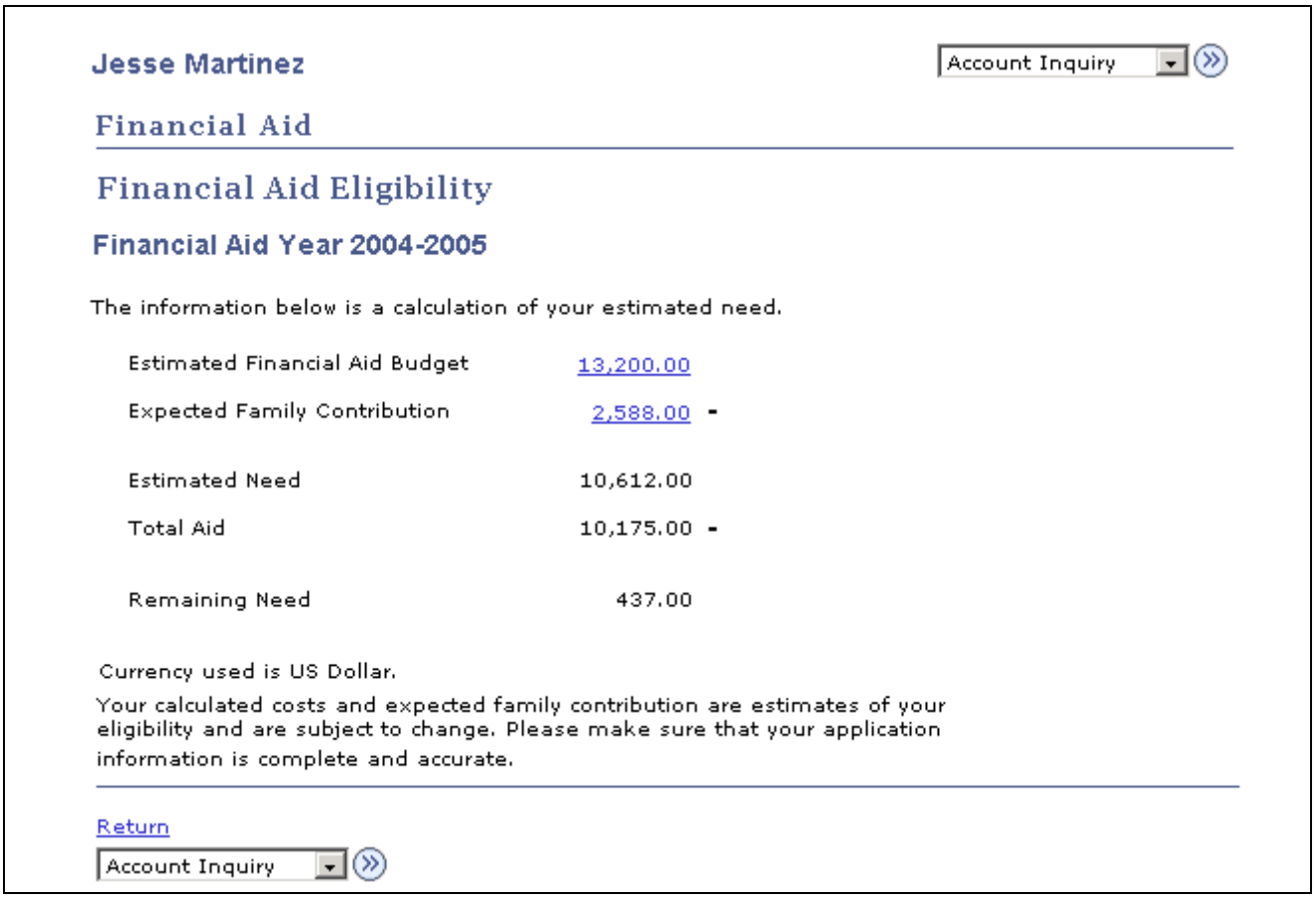
ACCEPT/DECLINE AWARDS Click to access the Financial Aid – Award Package page to accept, decline, clear, or update totals. The student can accept or decline any or all of the awards that are currently available.

View Scheduled Disbursement Dates Click to access the Financial Aid — Scheduled Disbursements page to view the type of award, the accepted amount, the fee, the net amount, and scheduled disbursement date. If a term includes only awards that are not disbursed through PeopleSoft Student Financials (Work-Study, for example), the Term Detail link is disabled because there are no scheduled disbursements.

Viewing Financial Aid Eligibility by Aid Year

Access the Financial Aid - Financial Aid Eligibility page.

Note. The title of this page, as well as the text of the link leading to it, comes from the Summary Link Label on the Self Service Options page.



Financial Aid – Financial Aid Eligibility page

Estimated Financial Aid Budget Click to view the detailed information the system used to determine the student's cost of attendance. If the cost of attendance amount is zero, the link is disabled.

Expected Family Contribution Click to view the parent, student, and total expected contribution. If the expected family contribution amount is zero, the link is disabled.

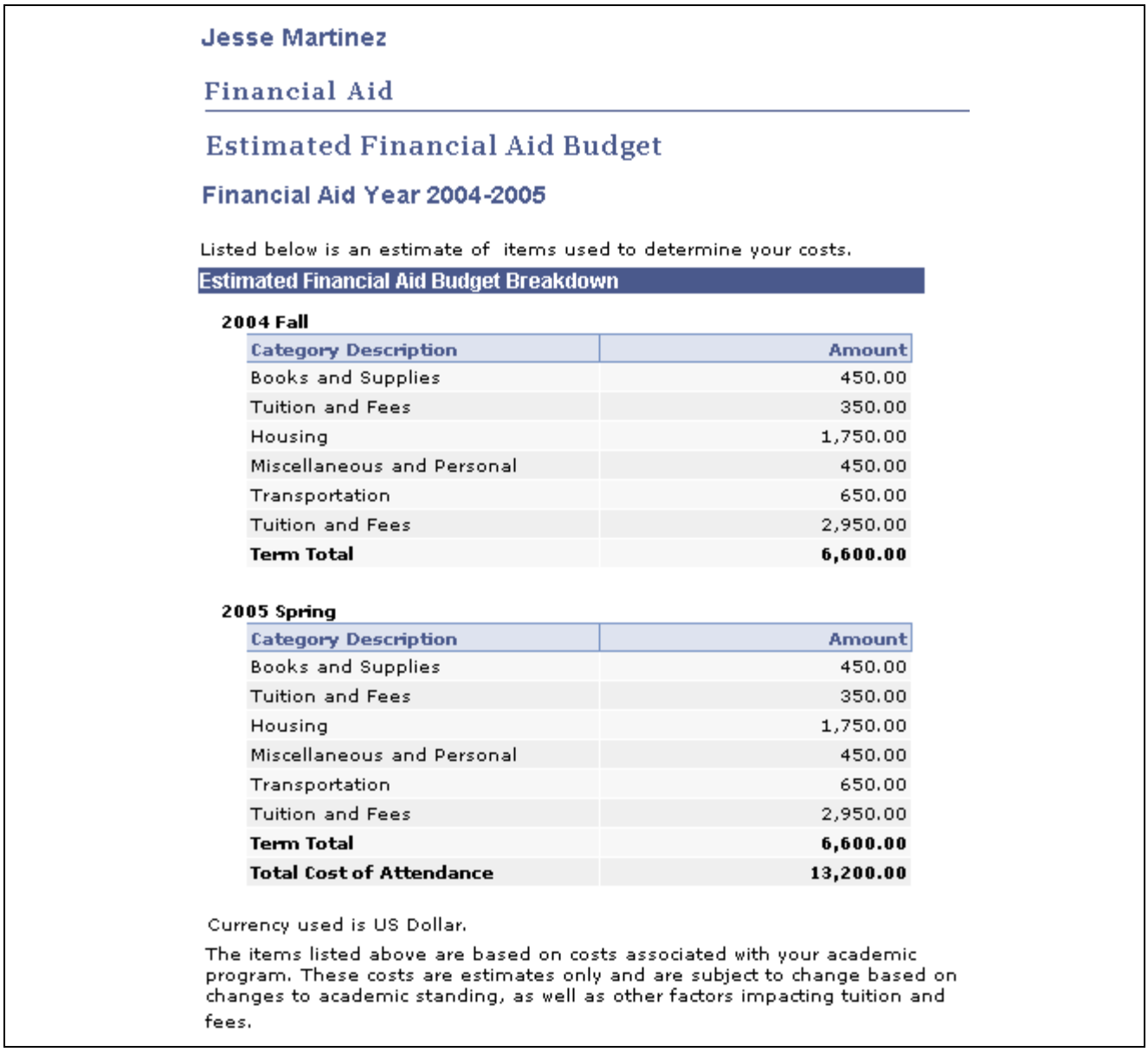
Remaining Need

Note. If this check box is not selected on the Self Service Options page, the system does not display remaining need.

Return Click to return to the Financial Aid – Award Summary page.

Viewing Estimated Financial Aid Budget by Aid Year

Access the Financial Aid – Estimated Financial Aid Budget page.



Jesse Martinez

Financial Aid

Estimated Financial Aid Budget

Financial Aid Year 2004-2005

Listed below is an estimate of items used to determine your costs.

Estimated Financial Aid Budget Breakdown

2004 Fall

Category Description	Amount
Books and Supplies	450.00
Tuition and Fees	350.00
Housing	1,750.00
Miscellaneous and Personal	450.00
Transportation	650.00
Tuition and Fees	2,950.00
Term Total	**6,600.00**

2005 Spring

Category Description	Amount
Books and Supplies	450.00
Tuition and Fees	350.00
Housing	1,750.00
Miscellaneous and Personal	450.00
Transportation	650.00
Tuition and Fees	2,950.00
Term Total	**6,600.00**
Total Cost of Attendance	**13,200.00**

Currency used is US Dollar.

The items listed above are based on costs associated with your academic program. These costs are estimates only and are subject to change based on changes to academic standing, as well as other factors impacting tuition and fees.

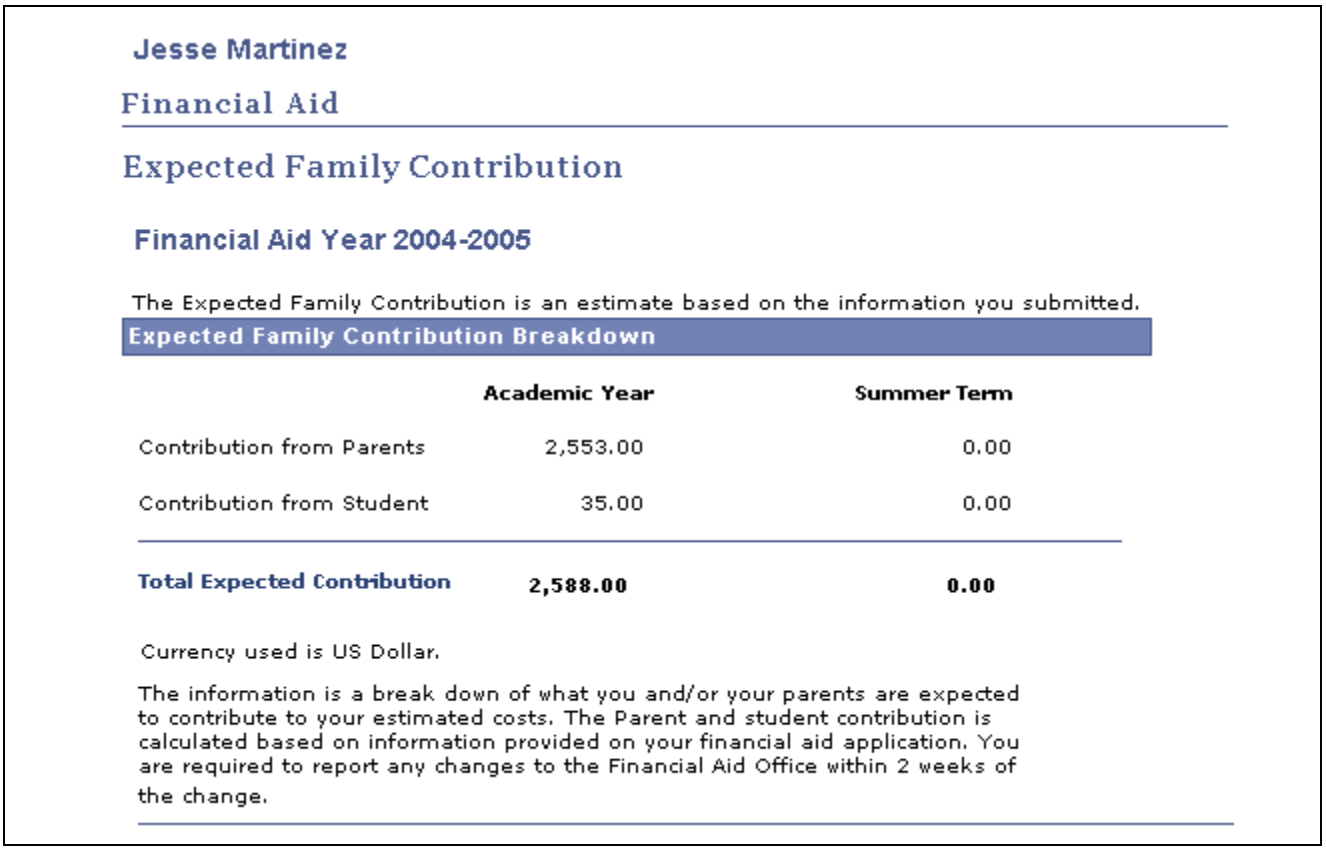
Financial Aid – Estimated Financial Aid Budget page

Return Click to return to the Financial Aid - Financial Aid Eligibility page.

Note. If the student accessed this page from the Financial Aid – Award Summary page, the link returns them there.

Viewing Expected Family Contribution by Aid Year

Access the Financial Aid - Expected Family Contribution page.

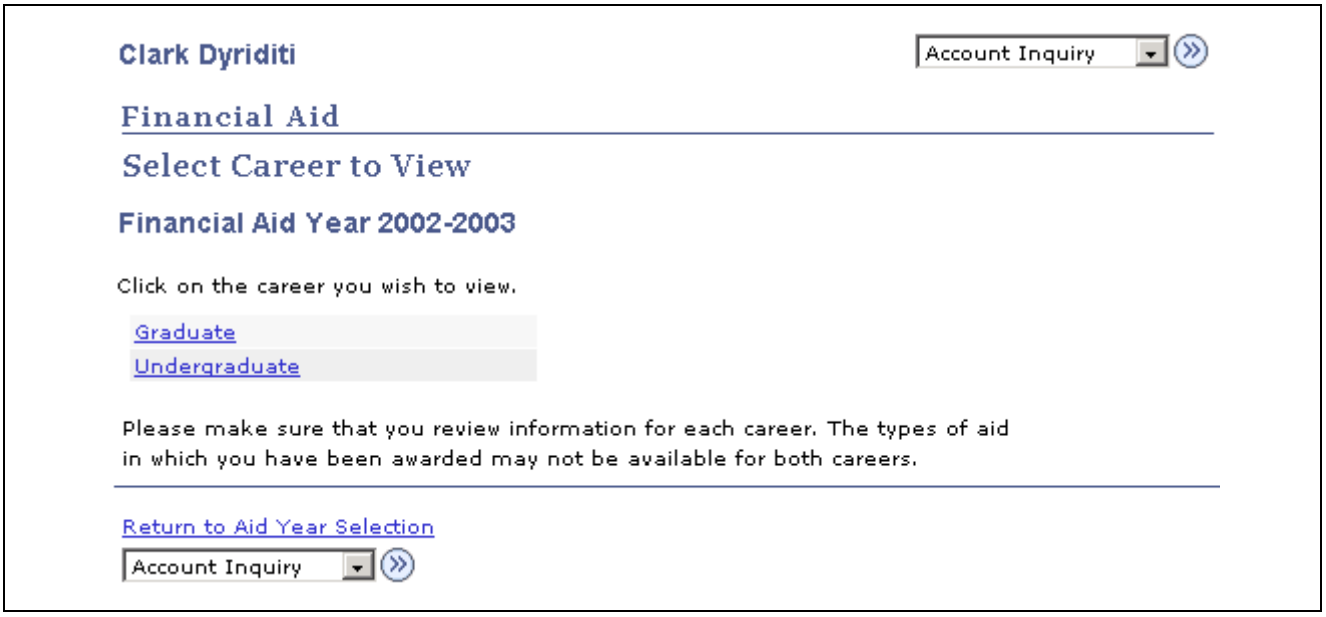


Financial Aid – Expected Family Contribution page

Return Click to return to the Financial Aid - Aid Summary page.

Selecting a Career to View by Aid Year

Access the Financial Aid - Select Career to View page.

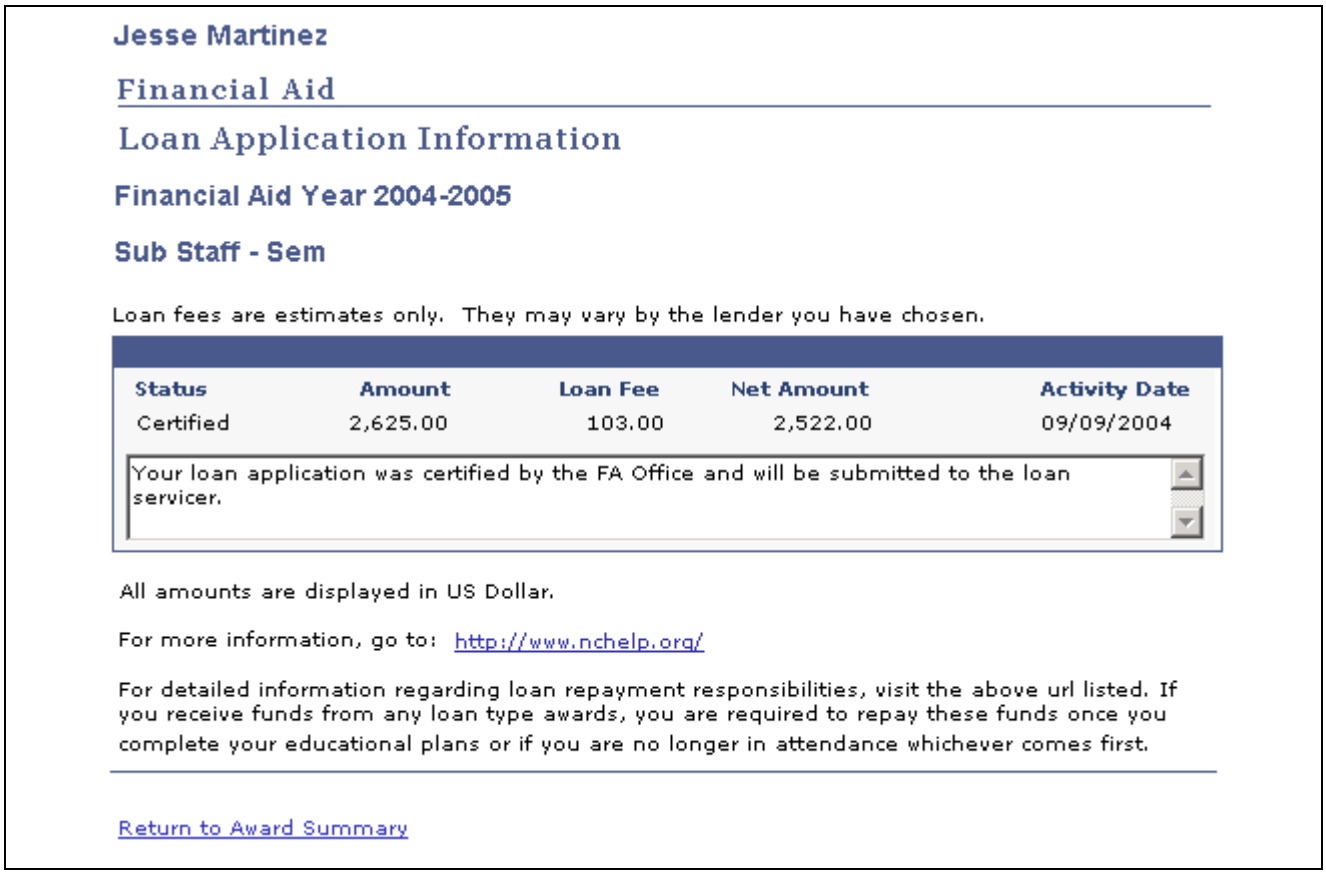


Financial Aid – Select Career to View page

If the student has financial aid for more than one career in the same aid year or award period, the Total Aid amount link on the Financial Aid - Aid Year Summary page takes them to the Financial Aid - Select Career to View page. This page displays a list of all careers for which the student has aid. When they select a career, the system takes them to the Financial Aid - Award Summary page, where awards for that career are displayed. To select a different career, the student must return to the Select Career to View page.

Viewing Loan Application Information by Aid Year

Access the Financial Aid - Loan Application Information page.



Financial Aid – Loan Application Information page

The loan status information comes from the loan origination records in the system and is based on the combination of the process and transmission loan statuses. The values displayed for the different combinations are defined on the Self Service Loan Status setup page. The text below the column headings contains a more detailed description of the loan status.

Return to Award Summary Click to return to the Financial Aid - Award Summary page.

Viewing Declined Awards by Aid Year

Access the Financial Aid - Declined Awards page.

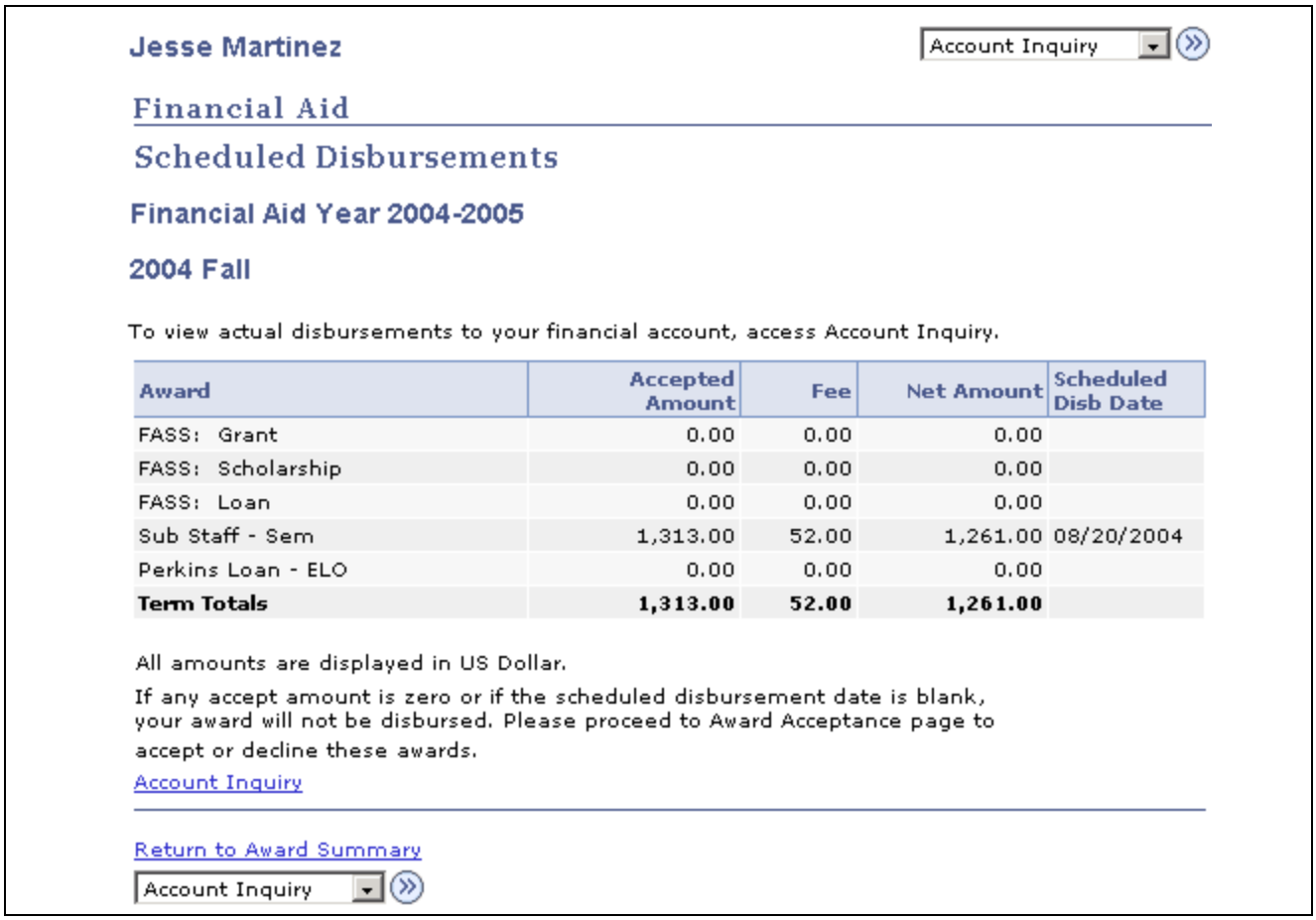


Financial Aid – Declined Awards page

Return to Award Summary Click to return to the Financial Aid - Award Summary page.

Viewing Scheduled Disbursements by Aid Year

Access the Financial Aid - Scheduled Disbursements page.



Financial Aid – Scheduled Disbursements page

Account Inquiry Click to access the Account Summary - Summary for All Terms page to view your account information.

Return to Award Summary Click to return to the Financial Aid - Award Summary page.

Note. The system displays awards that have been offered but not accepted by the student with a blank disbursement date.

Viewing Student Self Service Pages by Award Period

This section discusses how to:

- Select an award period to view.
- View financial aid award summary by award period.
- View financial aid eligibility by award period.
- View estimated financial aid budget by award period.
- View expected family contribution by award period.
- Select a career to view by award period.
- View loan application information by award period.

- View financial aid loan status information by award period.
- View declined awards by award period.
- View canceled awards by award period.
- View scheduled disbursements by award period.
- View financial aid eligibility by award period.

Pages Used to View Student Self Service Pages by Award Period

Page Name	Object Name	Navigation	Usage
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service, Campus Finances, View Financial Aid, Financial Aid – Select Aid Year to View	Select an award period to view.
Financial Aid - Award Summary	SS_FA_AWD_SUMM_PER	Click the link on the Financial Aid - Select Aid Year to View page designating the aid year they want to view.	View a detailed summary of financial aid by award period. This includes the type of award and the offered and accepted amounts for the academic year and terms within the award period.
Financial Aid – Financial Aid Eligibility	SS_FA_AP_SUMMARY	Click the Financial Aid Eligibility link on the Financial Aid – Award Summary page.	View financial aid eligibility by award period. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
Financial Aid - Estimated Financial Aid Budget	SS_FA_COA	Click the Estimated Financial Aid Budget amount link on the Financial Aid - Financial Aid Eligibility page.	View estimated financial aid budget by award period.
Financial Aid - Expected Family Contribution	SS_FA_EFC_BY_AP	Click the Expected Family Contribution amount link on the Financial Aid - Financial Aid Eligibility page.	View expected family contribution by award period. This includes both parent and student.
Financial Aid - Select Career to View	SS_FA_AP_CAR_SEL	Click the Total Aid amount link on the Financial Aid - Award Period Summary page.	Select a career to view by award period.
Financial Aid - Loan Application Information	SS_FA_LOAN_DETAIL	Click the Loan Application Information link on the Financial Aid - Award Summary page.	View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.

Page Name	Object Name	Navigation	Usage
Financial Aid - Declined Awards	SS_FA_AWD_PER_CD	Click the View Declined Awards link on the Financial Aid - Award Summary page.	View declined awards. This view is available to the student if the institution entered *Award Period* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Canceled Awards	SS_FA_AWD_PER_CD	Click the View Canceled Awards link on the Financial Aid - Award Summary page.	View canceled awards. This view is available to the student if the institution entered *Award Period* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term.

Selecting an Award Period to View

The system uses The Financial Aid - Select Aid Year to View page for both aid year and award period options.

See Also

Chapter 10, "Using Self Service Financial Aid," Viewing Student Self Service Pages by Award Period, page 120

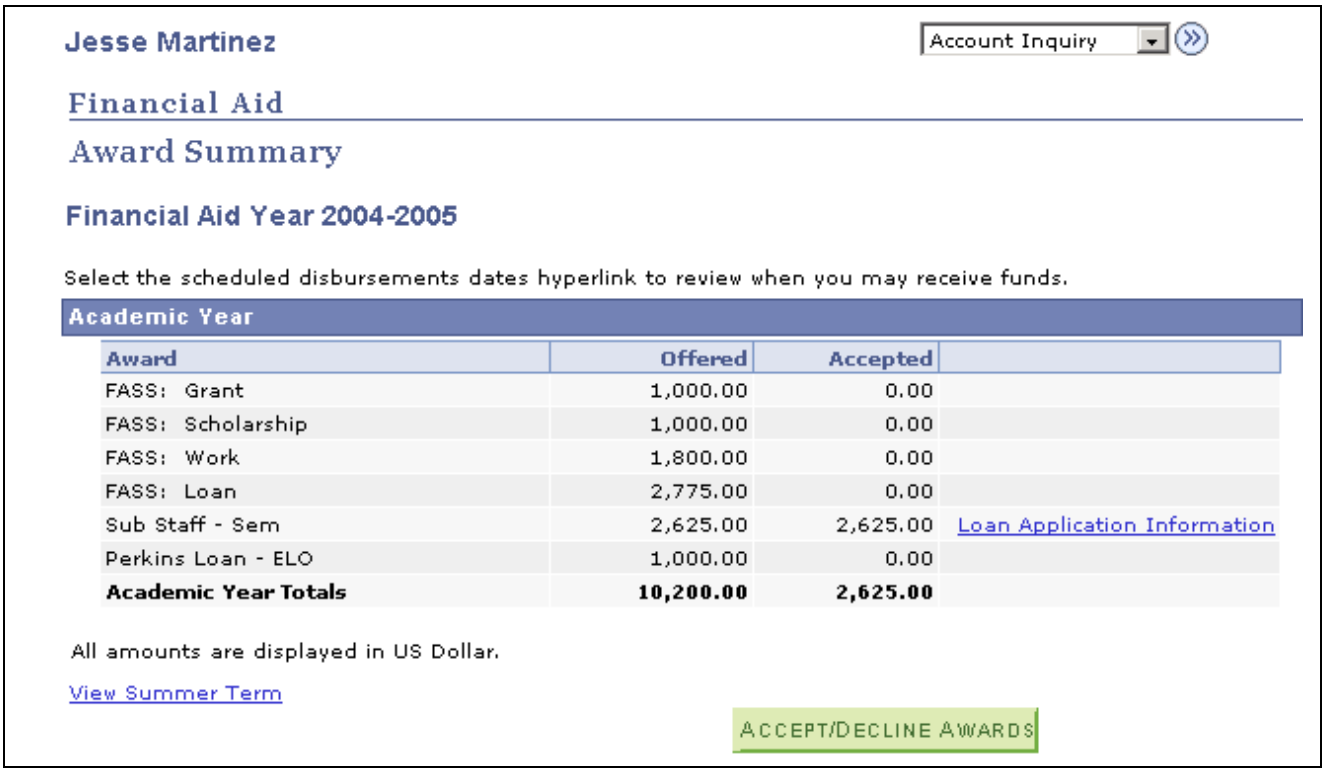
Chapter 6, "Setting Up Self Service for Financial Aid," Setting Up Self Service Inquiry Options, page 37

Viewing Financial Aid Summary by Award Period

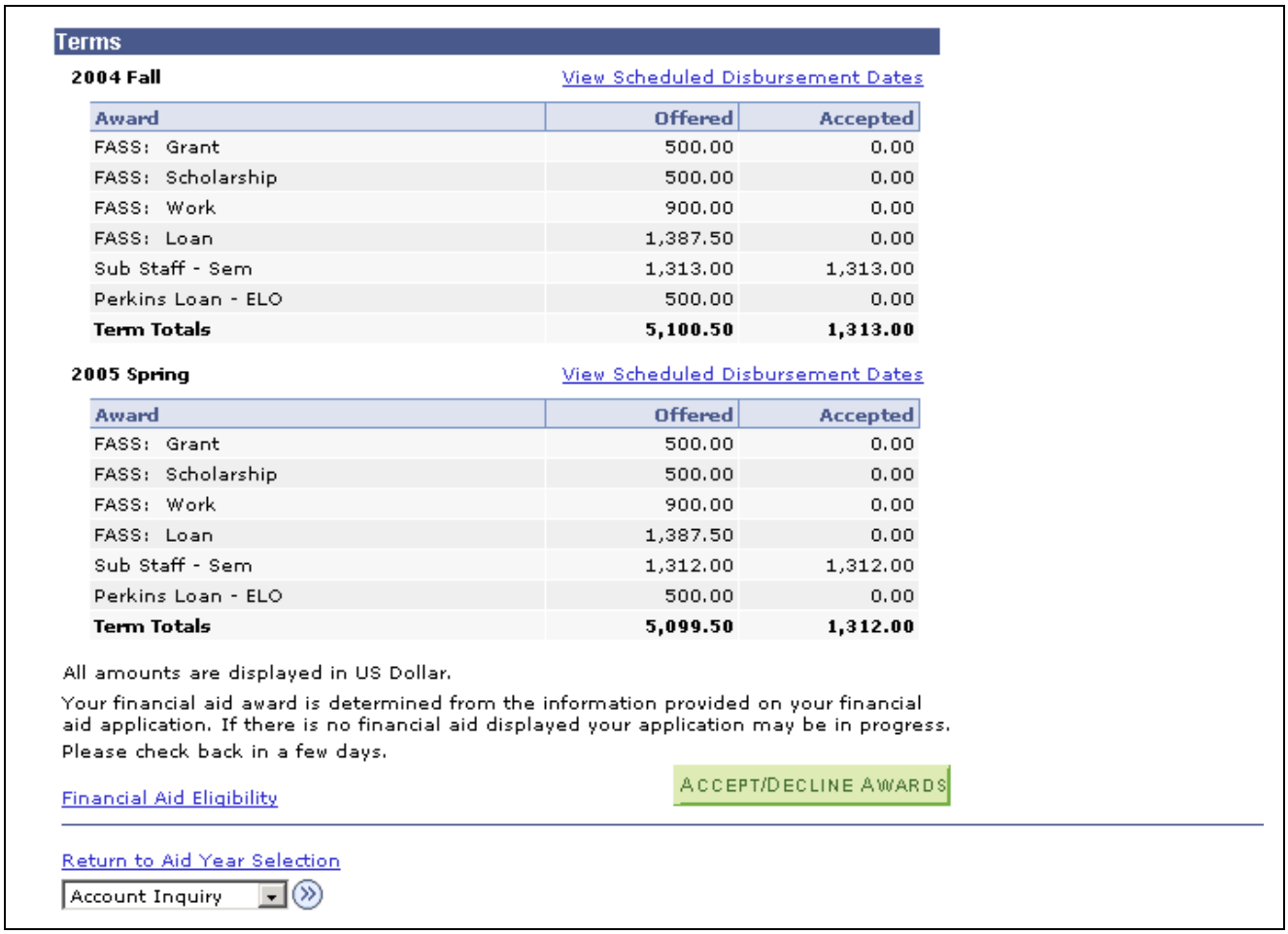
If the student has awards in only one award period, the system displays the award period that has the awards. If the student has awards in both periods, the system uses the Award Period sorting option from the Self Service options page to determine which period to display first.

Note. The name of the award period comes from the Alternate Text entered on the Self Service options page.

Access the Financial Aid - Award Summary page.



Financial Aid – Award Summary page (1 of 2)



Terms

2004 Fall — View Scheduled Disbursement Dates

Award	Offered	Accepted
FASS: Grant	500.00	0.00
FASS: Scholarship	500.00	0.00
FASS: Work	900.00	0.00
FASS: Loan	1,387.50	0.00
Sub Staff - Sem	1,313.00	1,313.00
Perkins Loan - ELO	500.00	0.00
Term Totals	**5,100.50**	**1,313.00**

2005 Spring — View Scheduled Disbursement Dates

Award	Offered	Accepted
FASS: Grant	500.00	0.00
FASS: Scholarship	500.00	0.00
FASS: Work	900.00	0.00
FASS: Loan	1,387.50	0.00
Sub Staff - Sem	1,312.00	1,312.00
Perkins Loan - ELO	500.00	0.00
Term Totals	**5,099.50**	**1,312.00**

All amounts are displayed in US Dollar.

Your financial aid award is determined from the information provided on your financial aid application. If there is no financial aid displayed your application may be in progress. Please check back in a few days.

Financial Aid Eligibility — ACCEPT/DECLINE AWARDS

Return to Aid Year Selection

Account Inquiry

Financial Aid – Award Summary page (2 of 2)

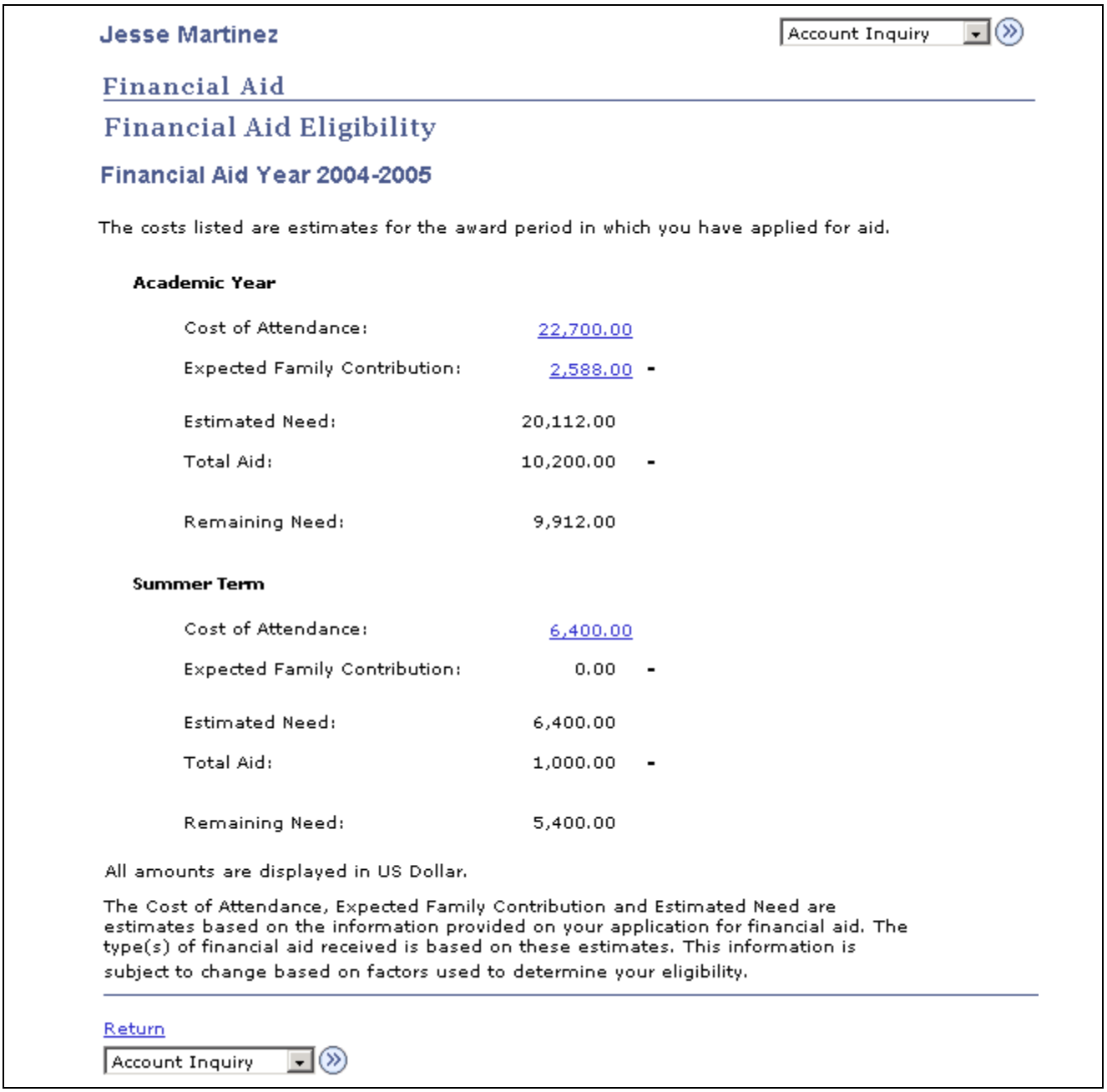
View Summer Term Click to view your non-standard period awards. When viewing the non-standard period, this link will read, “View Academic Year”. The text of the link comes from the Alternate Text entered on the Self Service Options page.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing a Detailed Summary of Financial Aid by Aid Year, page 113

Viewing Financial Aid Eligibility by Award Period

Access the Financial Aid – Financial Aid Eligibility page.



Financial Aid – Financial Aid Eligibility page

Viewing Estimated Financial Aid Budget by Award Period

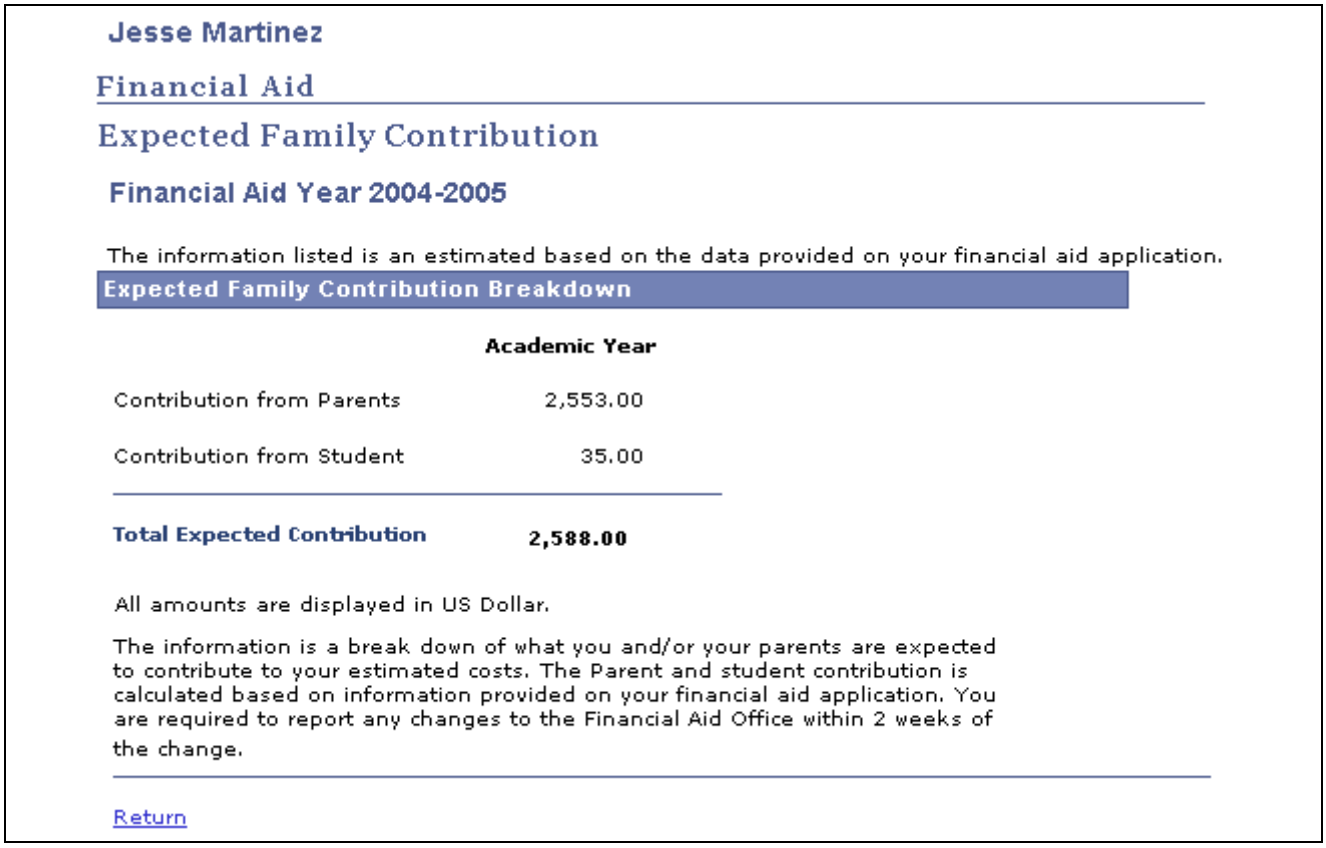
The Financial Aid - Estimated Financial Aid Budget page is the same for both aid year and award period options.

See Also

Chapter 10, "Using Self Service Financial Aid," Viewing Estimated Financial Aid Budget by Aid Year, page 115

Viewing Expected Family Contribution by Award Period

Access the Financial Aid – Expected Family Contribution page.



Financial Aid – Expected Family Contribution page

Return Click to return to the Financial Aid - Award Period Summary page.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing Expected Family Contribution by Aid Year, page 116

Selecting a Career to View by Award Period

The Financial Aid – Select Career to View page is the same for both aid year and award period options.

See Also

Chapter 10, “Using Self Service Financial Aid,” Selecting a Career to View by Aid Year, page 117

Viewing Loan Application Information by Award Period

Students use the Financial Aid - Loan Application Information page to view loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available. The Financial Aid – Loan Application Information page is the same for both aid year and award period options.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing Loan Application Information by Aid Year, page 118

Viewing Financial Aid Loan Status Information by Award Period

The Financial Aid - Status Information page is the same for both aid year and award period options.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing Student Self Service Pages by Aid Year, page 110

Viewing Declined Awards by Award Period

The Financial Aid – Declined Awards page is the same for both aid year and award period options.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing Declined Awards by Aid Year, page 118

Viewing Scheduled Disbursements by Award Period

The Financial Aid – Scheduled Disbursements page is the same for both aid year and award period.

See Also

Chapter 10, “Using Self Service Financial Aid,” Viewing Scheduled Disbursements by Aid Year, page 119

CHAPTER 11

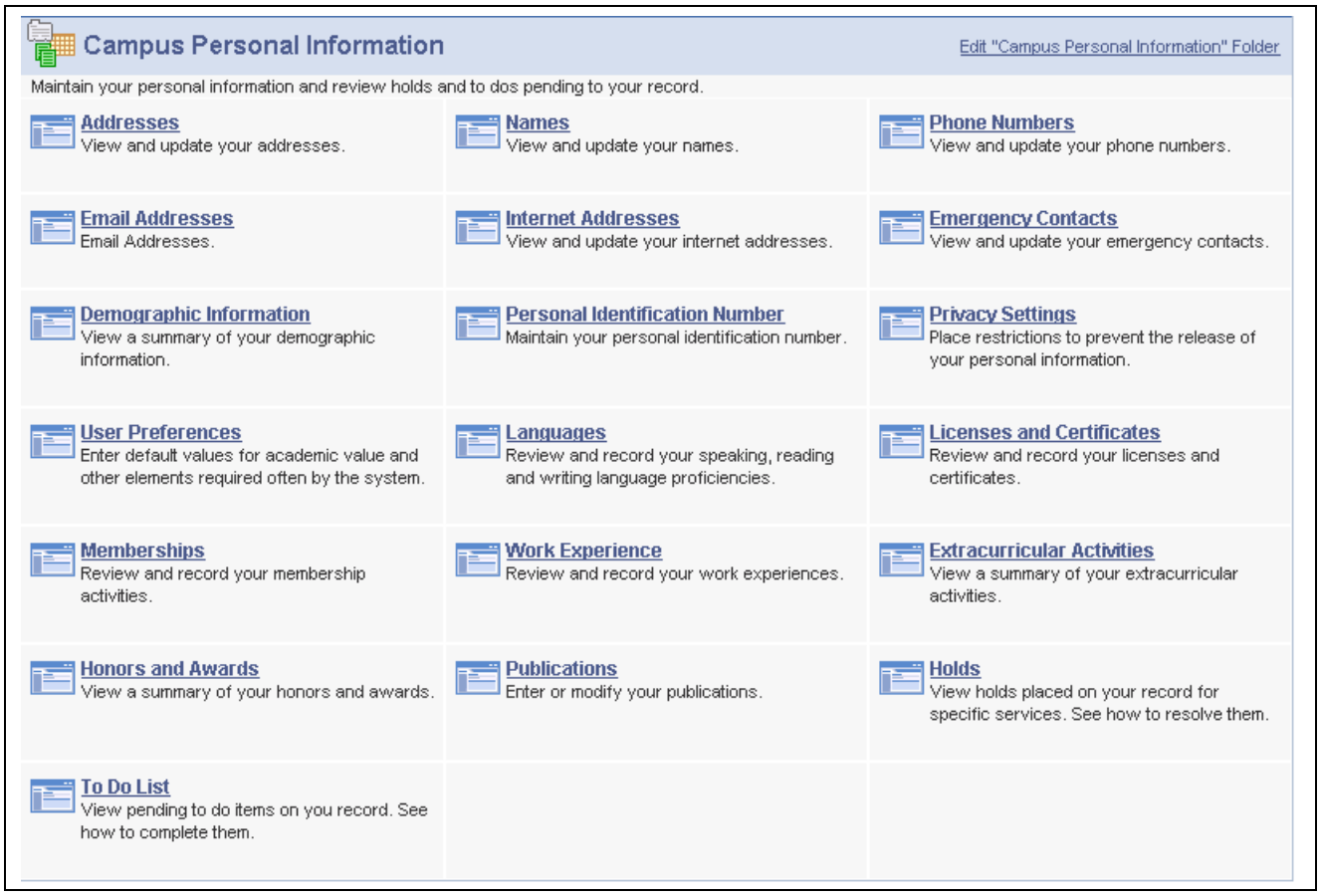
Using Self-Service Campus Personal Information

This chapter provides an overview of self-service user preferences and self-service personal information functionality, and discusses how to:

- Use self-service languages data.
- Use self-service biographical data.
- Use self-service services data.
- Use self-service user preferences.
- Use self-service service indicators data.
- Use self-service checklists data.
- Use self-service identification data.
- Use self-service participation data.

Understanding PeopleSoft Self-Service Campus Personal Information

The personal information functionality of PeopleSoft Campus Self Service exposes familiar PeopleSoft Campus Community information to self-service users. It provides an easy way for self-service users to update basic personal information about themselves at any time without having to visit your offices or complete and mail a hardcopy form.



Campus Personal Information self-service functions

All authenticated roles can use self-service functionality. They can use it to maintain their own personal information. They can also use it to review the holds and to do items on record at your institution for themselves.

Note. For security reasons, the following data is view-only for self-service users: national identification number, citizenship, driver's license, visa or permit data, veteran status, gender, birth date, marital status, ethnicity, extracurricular activities, and internal honors and awards.

Understanding Self-Service User Preferences

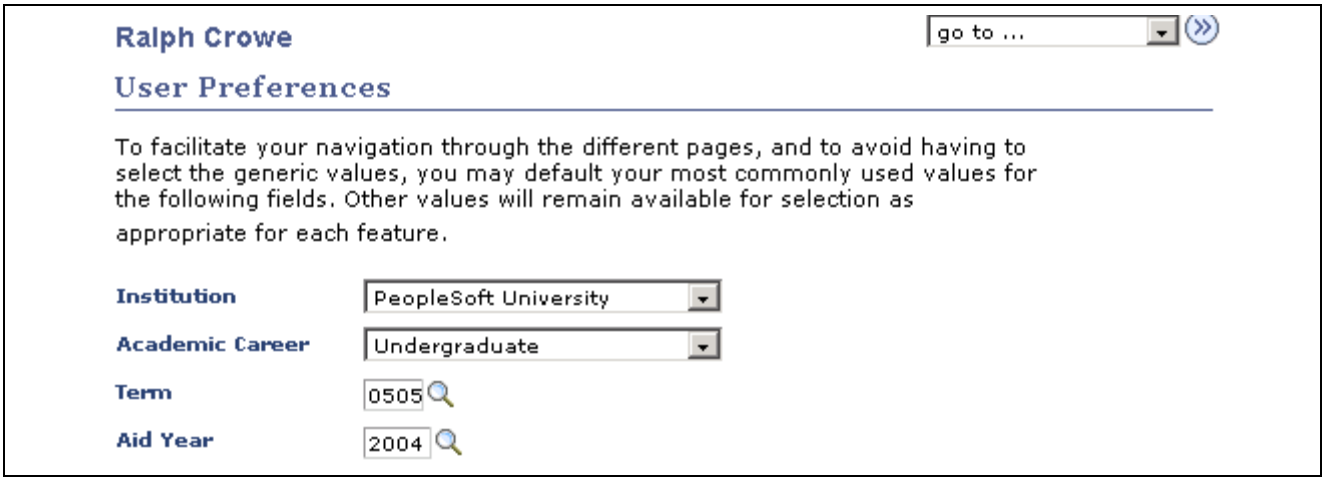
User preferences enable self-service users to set default values for themselves to minimize the need for repetitive data entry. Once set, the default values remain associated with the user until changed or deleted.

Page Used to for Self-Service User Preferences

Page Name	Object Name	Navigation	Usage
User Preferences	SS_CC_USER_PREF	Self Service, Campus Personal Information, User Preferences.	Enter default values for academic value and other elements required often by the system.

User Preferences Page

Online self-service users access the User Preferences page.



User Preferences page

Self-service users can select their own user preferences or you can do it for them by using the User Profiles Management process to assign them the latest values corresponding to their profile.

Understanding Self-Service Addresses, Names, Phones, and Demographic Data

Self service users can view and update their own addresses, names, phone numbers, and demographic data, including gender, date of birth, and marital status.

Addresses, names, phones, and demographic data are set up in PeopleSoft Enterprise Campus Solutions system. No additional setup is required for self-service.

Links under Campus Personal Information enable online self-service users to view, modify or update their own:

- Addresses
- Names
- Phone numbers
- Email Addresses
- Internet Addresses
- Emergency contacts
- Demographic information, including gender, date and place of birth, marital status and so on

Pages Used for Self-Service Addresses, Names, Phones, and Demographic Data

Page Name	Object Name	Navigation	Usage
Addresses	SS_ADDRESSES	Self Service, Campus Personal Information, Addresses, Addresses	View your current address types as permitted by the Type Control page, and the associated address data.
Edit Address	EO_ADDR_USA_SEC	Click the edit button on the Addresses page or the ADD A NEW ADDRESS button on the Address page.	When accessed from the edit button, edit or update your addresses. When accessed from the ADD A NEW ADDRESS button, add an address type and associated data for yourself to be effective now or on a future date.
Delete Address	SS_UPDATE_ADDRESS	Click the Delete (type) address link on the Addresses page.	Delete an address type and associated data.
Add Address	SS_UPDATE_ADDRESS	Click the ADD A NEW ADDRESS button on the Addresses page, enter data for the new address, and click OK.	Add an address type and associated data.
Future Addresses	SS_FUTURE_ADDRESS	Click ADD A NEW ADDRESS on the Addresses page, enter data for the new address, and click OK. Enter the future effective date for the new address and click Save. ClickCHANGE A FUTURE ADDRESS.	Review the date and type of a future-dated address and select links to change or delete a future-dated address.
Names	SS_CC_NAME	Self Service, Campus Personal Information, Names, Names	View your current name types as permitted by the Type Control page, and the associated name data.
Change Name, Add a New Name, Change Name	SS_CC_UPDATE_NAME	Click edit on the Names page to access the Change Name page. Click ADD A NEW NAME on the Names page to access the Add a New Name page.	When accessed from the edit button, you can view or update the name type. When accessed from the ADD A NEW NAME button, you can add a name type and new name with a current for future effective date.

Page Name	Object Name	Navigation	Usage
Phone Numbers	SS_CC_PERS_PHONE	Self Service, Campus Personal Information, Phone Numbers	View and update your current phone types as permitted by the Type Control page, and phone numbers. Buttons on this page also enable you to add or delete rows to add or delete phone numbers.
Email Addresses	SS_CC_EMAIL_ADDR	Self Service, Campus Personal Information, Email Addresses	View and update your current email address types as permitted on the Type Control page, and email addresses. Buttons on this page also enable you to add or delete rows to add or delete email addresses.
Internet Addresses	SS_CC_INTERNET_ADR	Self Service, Campus Personal Information, Internet Addresses	View and update internet addresses, including web site and FTP site addresses. Buttons on this page also enable users to add or delete rows to add or delete internet addresses.
Emergency Contacts	SS_CC_EMRG_CNTCT_L	Self Service, Campus Personal Information, Emergency Contacts	View the name, address, and phone numbers for your emergency contact.
Emergency Contact Detail	SS_CC_EMRG_CNTCT_D	Click ADD AN EMERGENCY CONTACT on the Emergency Contact page.	Add an emergency contact for yourself , and enter the contact information.
Change Primary Contact	SS_CC_PRIM_CONTACT	Click CHANGE THE PRIMARY CONTACT on the Emergency Contacts page.	Change the primary emergency contact.
Demographic Information	SS_CC_DEMOG_DATA	Self Service, Campus Personal Information, Demographic Information	View a summary of your demographic data such as your date of birth, gender, marital status, national ID, and so on. **Note.** If a photo is loaded into the system from on the Photograph page in PeopleSoft Enterprise Campus Solutions, that photo appears in the upper right on this page.

Page Name	Object Name	Navigation	Usage
List FERPA/Directory Restrictions	SS_CC_FERPA_INQ	Self Service, Campus Personal Information, Privacy Settings	View data that you have restricted from being released.
Edit FERPA/Directory Restrictions	SS_CC_FERPA	Click the EDIT FERPA DIRECTORY RESTRICTIONS button on the FERPA Restrictions page.	Place restrictions to prevent the release of data about yourself.
Release To Publication	INST_PUB_CATG_SEC2	Click the Release To Publication link on the Edit FERPA/Directory Restrictions page.	Release restricted information for inclusion in specific internal directory publications.

Using Self-Service Personal Attributes Data

Self-service users can view and update the list of languages that they read, write, and speak.

Languages are set up in PeopleSoft Enterprise Campus Solutions. No additional setup is required for self service.

Note. Ethnicity, religious preference, and decedent data personal attributes are not available from Campus Self Service. These are set up and maintained in PeopleSoft Enterprise Campus Solutions only.

Pages Used for Self-Service Personal Attributes

Page Name	Object Name	Navigation	Usage
Languages	SS_CC_LANGUAGES_L	Self Service, Campus Personal Information, Languages	View or edit a list of the languages that you read, write, or speak and the proficiency with which you read, write, or speak them.
Language Detail	SS_CC_LANGUAGES_D	• Click the name of the language on the Languages page. • Click the edit button on the Languages page • Click theADD A LANGUAGE button on the Languages page.	When accessed from the name of the language, view details of that language and your proficiency. When accessed from the edit button, view and modify details of that language and your proficiency. When accessed from the ADD A LANGUAGE button, add a language to your list of languages.

Using Self-Service Identification Data

Self-service users can enter and change their own personal identification numbers from within Campus Self Service. No specific setup is required.

Note. For security reasons, other identification data are either not available from Campus Self Service (external system ID and residency data) or used as display only (visa and passport data, driver's license information or photos) These are set up and maintained in PeopleSoft Enterprise Campus Solutions only.

Page Used for Self-Service Identification Data

Page Name	Object Name	Navigation	Usage
Personal Identification Number	SS_CC_PIN	Self Service, Campus Personal Information, Personal Identification Number	Create a personal identification number for yourself.

Using Self-Service Participation Data

Self-service users can view and update lists of their own licenses and certificates, memberships, and publications from within Campus Self Service. In addition, individuals can view lists of their own extracurricular activities and honors and awards.

Participation data is set up in PeopleSoft Enterprise Campus Solutions system. No additional setup is required for self service.

Note. Athletic participation is not available from Campus Self Service. You set up and maintain athletic participation data in PeopleSoft Enterprise Campus Solutions only.

Pages Used for Self-Service Participation Data

Page Name	Object Name	Navigation	Usage
License and Certificates	SS_CC_LIC_CERT_L	Self Service, Campus Personal Information, Licenses and Certificates	View a list of your licenses and certificates.

Page Name	Object Name	Navigation	Usage
License/Certificate Detail	SS_CC_LIC_CERT_D	• Click the name of the license or certificate on the License and Certificates page. • Click the edit button on the License and Certificates page • Click theADD A LICENSE/CERTIFICATE button on the Licenses and Certificates page.	When accessed from the name of the license or certificate, view details about that license or certificate. When accessed from the edit button, view or modify details about that license or certificate. When accessed from the ADD A LICENSE/CERTIFICATE button, add another license or certificate to your list of licenses and certificates.
Memberships	SS_CC_MEMBER_L	Self Service, Campus Personal Information, Memberships	View a list of your memberships.
Membership Detail	SS_CC_MEMBER_D	• Click the name of the membership on the Memberships page • Click the edit button on the Memberships page. • Click theADD A MEMBERSHIP button on the Memberships page.	When accessed from the name of the membership, view details about that membership. When accessed from the edit button, view or modify details about that membership. When accessed from the ADD A MEMBERSHIP button, add another membership to your list of memberships.
Extracurricular Activities	SS_CC_EXTRACUR_ACT	Self Service, Campus Personal Information, Extracurricular Activities	View a list of your extracurricular activities. **Note.** Self service users can view extracurricular activities information, but they cannot enter, modify, or update it.
Honors and Awards	SS_CC_HONOR_AWARD	Self Service, Campus Personal Information, Honors and Awards, Academic Honors and Awards	View a list of your academic honors and awards. **Note.** Self service users can view academic honors and awards information, but they cannot enter, modify, or update it.
Publications	SS_CC_PUB_L	Self Service, Campus Personal Information, Publications	View a list of your publications.

Page Name	Object Name	Navigation	Usage
Publication Detail	SS_CC_PUB_D	Click the name of the publication on the Publications page. Click the edit button on the Publications page. Click the ADD PUBLICATION button on the Publications page.	When accessed from the name of the publication, view details of that publication. When accessed from the edit button, view and modify details of that publication. When accessed from the ADD PUBLICATION button, add a publication to your list of publications.

Using Other Self-Service Biographical Data

You can also use Campus Community self service to enable students to manage other biographical data.

Pages Used to Enter Other Self-Service Biographical Data

Page Name	Object Name	Navigation	Usage
Work Experience	SS_CC_WORK_EXP_A	Self Service, Campus Personal Information, Work Experience	View a list of your work experience.
Employment Details	SS_CC_WORK_EXP	Click the name of the work experience on the Work Experience page. Click the edit button on the Work Experience page. Click the ADD A WORK EXPERIENCE button on the Work Experience page.	When accessed from the name of the work experience, view details of that work experience. When accessed from the edit button, view and modify details of that work experience. When accessed from the ADD A WORK EXPERIENCE button, add a work experience to your list of work experiences

Using Self-Service Service Indicators Data

Self-service service indicators are presented in Campus Self Service as holds.

Service indicators are set up in PeopleSoft Enterprise Campus Solutions. No additional set up is required for self service.

The Holds link under Campus Personal Information enables self-service users to assume responsibility for viewing and resolving their own negative service indicator issues.

Note. Positive service indicators are not presented from Campus Self Service. Positive service indicators are set up and applied in PeopleSoft Enterprise Campus Solutions only.

Pages Used for Self-Service Service Indicators Data

Page Name	Object Name	Navigation	Usage
Your Holds	SS_CC_HOLDS	Self Service, Campus Personal Information, Holds	View holds placed on services for yourself and determine how and by when to resolve them.
Hold Item	SS_CC_HOLD_SEC	Click the name of the hold item on the Your Holds page.	View information about a specific hold and determine how to resolve it and whom to contact

Using Self-Service Checklists Data

Checklists data is presented as a to do list in Campus Self Service.

The To Do List link under Campus Personal Information enables self-service users to assume responsibility for viewing and resolving their own pending checklist items.

Checklists are set up in PeopleSoft Enterprise Campus Solutions. No additional setup is required for self service.

Pages Used for Self-Service Checklists Data

Page Name	Object Name	Navigation	Usage
To Do List	SS_CC_TODOS	Self Service, Campus Personal Information, To Do List	View your pending checklist items and determine what to do to satisfy the requirements.
To Do Item	SS_CC_TODOS_SEC	Click the name of the To Do Item on the To Do List page.	View information about a specific checklist item and determine what is required and whom to contact.

CHAPTER 12

Using Self-Service Academic Records

This chapter discusses how students perform the following self-service tasks:

- View grades.
- Request official transcripts.
- View unofficial transcripts.
- View advisors.
- Request enrollment verifications.

Viewing Grades

Students can view their posted grades through the Campus Self Service.

Page Used to View Grades

Page Name	Object Name	Navigation	Usage
View My Grades	SS_ES_GRADE_LIST	Self Service, Academic Records	Students can view their posted grades by term.

Requesting Official Transcripts

Students can request official transcripts through Campus Self Service.

Prerequisites

Before you enable self-service transcript requests (official or unofficial), you must define which transcript types you want to make available for official and unofficial transcript requests. Use the Self-Service Availability group box on the Transcript Type - Basic Data page to do this.

Pages Used to Request a Self-Service Transcript

Page Name	Object Name	Navigation	Usage
Request Official Transcript	SS_TSCRPT_OFF	Self Service, Academic Records	Students use this page to enter their request for an official transcript. Students enter their processing preferences, transcript quantity, and recipient address information. If students select the My Address check box, they can specify which of their system addresses they want to use.
Transcript Request Confirmation	SS_TSCRPT_OFF1	Automatically appears after the student submits his or her transcript request.	Students use the Transcript Request Confirmation page to confirm their request. Students can print this confirmation through their browser.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Request Official Transcript page.	Edit your address.

Viewing Unofficial Transcripts

Students can view unofficial transcripts through Campus Self Service.

Prerequisites

Before you enable self-service transcript requests (official or unofficial), you must define which transcript types you want to make available for official and unofficial transcript requests. Use the Self-Service Availability group box on the Transcript Type - Basic Data page to do this.

Pages Used to View Unofficial Transcripts

Page Name	Object Name	Navigation	Usage
Unofficial Transcript	SS_ES_AARPT_TYPE2	Self Service, Academic Records, View Unofficial Transcript	Students use the Unofficial Transcript page to specify the institution and report type that they want to generate.
View Previously Requested Reports	SS_STUREQ_RSLT	Self Service, Academic Records, View Unofficial Transcript	Students use the View Previously Requested Reports page to view a summary of all unofficial reports they have generated.
Report Results	SS_REPORT_RESULT_A	Automatically appears after the student submits his or her transcript request.	Student view the result of the report.

Viewing Advisors

Students can view advisor information through Campus Self Service.

Page Used to View Advisors

Page Name	Object Name	Navigation	Usage
My Advisors	SS_STDNT_ADVISR	Self Service, Academic Records, View My Advisors	Students can view their academic advisors by academic career and program at an academic institution.

Requesting Enrollment Verifications

This section discusses how students can request and view enrollment verifications through self-service.

Pages Used to Request Enrollment Verifications

Page Name	Object Name	Navigation	Usage
Request Enrollment Verification	SS_ENRL_VER_REQ	Self Service, Academic Records, Request Enrollment Verification	Print enrollment verifications from the browser or request the institution to mail the verification
Request Enrollment Verification	SS_ENRL_VER_RESULT	Self Service, Academic Records, Request Enrollment Verification	View the results of a self-service enrollment verification request.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Request Enrollment Verification page.	Edit your address.

CHAPTER 13

Using Self-Service Degree Progress/Graduation

This chapter discusses how to:

- View the Degree Progress report through self-service pages.
- Apply for graduation through self-service pages.

Viewing the Degree Progress Report Through Self-Service Pages

Students can view the Degree Progress report through pages in Campus Self Service.

Pages Used to View the Degree Progress Report Through Self-Service Pages

Page Name	Object Name	Navigation	Usage
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service, Degree Progress/Graduation, View Degree Progress Report	Students can request a Degree Progress report by selecting their institution and a report type and clicking Go.
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on Degree Progress Report page.	Students can run a quick what-if scenario
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on Degree Progress Report page.	Students can run course list what-if scenarios .

Applying for Graduation Through Self-Service Pages

This section provides an overview of the self-service application process and discusses how to students can apply for graduation through pages in Campus Self Service.

Understanding the Self-Service Application Process

Campus Self Service enables students to submit requests for graduation over the internet using a single self-service transaction. A successful self-service application updates a student's Program/Plan record with a new effective-dated row and program action of *Data Change.* The self-service application also updates the student's degree checkout status to *Applied.* You can use the Graduation Processing and Reporting feature to select this population of students and to track and update their degree checkout progress through graduation.

Degree checkout counselors and academic advisors who are evaluating and approving student applications for graduation, for example, can later use the Graduation Reporting component to query and identify this student as part of a larger student population in the system (students with a degree checkout status equal to *Applied).*

Prerequisites

Before students can use the self-service Apply for Graduation feature, you must define valid graduation terms on the Term Calendar 4 page. For each graduation term, you must specify a range of days that a student must apply within in order to apply for the graduation term. For example, you can set up a term of fall 2005 with a valid date range of September 1, 2004, through August 15, 2005. Students that use the self-service Apply for Graduation feature between the dates of September 1, 2004, and August 15, 2005, see *Fall 2005* as one of the graduation term choices.

Pages Used to Apply for Graduation Through Self-Service Pages

Page Name	Object Name	Navigation	Usage
Apply for Graduation	SS_GRAD_APPLY	Self Service, Degree Progress/Graduation	Students view the academic programs for which they are eligible to apply for graduation.
Apply for Graduation - Select Graduation Term	SS_GRAD_APPLY2	Self Service, Degree Progress/Graduation Click an academic program.	Students specify the graduation term for which you are applying.
Apply for Graduation - Submit Application	SS_GRAD_APPLY3	Self Service, Degree Progress/Graduation Click the Continue button on the Apply for Graduation - Select Graduation Term page.	Students verify the accuracy of a request before it is officially submitted.
Apply for Graduation - Confirmation	SS_GRAD_APPLY4	Self Service, Degree Progress/Graduation Click the Submit Application button on the Apply for Graduation - Submit Application page.	Students receive confirmation from the system that an application for graduation was successfully submitted.

CHAPTER 14

Using Self-Service Transfer Credit

This chapter discusses how to:

- View transfer credit reports through self-service pages.
- Evaluate transfer credit through self-service pages.

Viewing Transfer Credit Reports Through Self-Service Pages

Students can view transfer credit reports through pages in Campus Self Service.

Page Used to View Transfer Credit Reports Through Self-Service Pages

Page Name	Object Name	Navigation	Usage
View Transfer Credit Report	SS_TRCR_RPT	Self Service, Transfer Credit	Students can view all of their course, test, and other transfer credit that your academic institution has submitted for posting to their student enrollment records.

Evaluating Transfer Credit Through Self-Service Pages

This section provides an overview of the Self-Service Modeling Transfer Credit feature and discusses how students, applicants, prospects, and visitors can use this feature.

Understanding the Self-Service Modeling Transfer Credit Feature

The Self-Service Modeling Transfer Credit feature enables users to enter and process "what-if" course transfer credit evaluations over the internet. Students, applicants, prospects, and visitors can use the Evaluate Transfer Credit self-service pages to create course transfer credit models based on transfer courses from external organizations or from internal academic careers and programs. These individuals can then process their transfer credit models, view their transfer credit evaluation summaries, and use the evaluation results to run what-if degree progress reports.

In addition to what-if courses entered by the student and possible internal courses on the student's record, the system includes in its degree progress analysis all courses on the individual's record that are in a "completed" or "posted" transfer model. This way, for prospects and applicants with completed (but not posted) transfer models on file, the system automatically articulates and includes these courses in the what-if degree audit.

Users have access to the self-service Modeling Transfer Credit feature based on their role. Visitors—individuals who have not formally applied to your institution—can access the Evaluate Transfer Credit self-service pages once the visitor has been assigned an ID. Prospects, applicants, and students can also access the Evaluate Transfer Credit self-service pages.

The Self-Service Modeling Transfer Credit feature stores the data it creates in its own tables separate from the tables the Student Records feature uses. This separation ensures the data integrity of official transfer credit records. However, the page elements of the self-service feature prompt against the setup tables of the Student Records Transfer Credit feature, making the setup for the Transfer Credit feature a prerequisite for the self-service feature. Before a user can evaluate transfer credit scenarios, you must define academic institutions, careers, programs, terms, courses, course transfer equivalency rules, and academic program and source equivalencies.

Because the course transfer rules associated with an external organization or internal academic institution are based on effective dates and grade points, the articulation term, external term, external year, unit, and grading information that individuals enter into their models is critical. The self-service pages have onscreen instructions that guide individuals through these data entry requirements so that they can receive accurate information.

Note. Transfer model self-service reports always include both posted and completed transfer models, regardless of the Incl Completed Transfer Models check box setting on the Transcript Type—Basic Data page.

Prerequisites

Before individuals can process self-service transfer credit modelling, you must:

- Set up your system for academic advising.
- Define a transcript type that is available for self-service processing.

Pages Used to Evaluate Transfer Credit Through Self-Service Pages

Page Name	Object Name	Navigation	Usage
Evaluate My Transfer Credit	SS_TRCR_SRCH	Self Service, Transfer Credit	Individuals can use this page to edit or delete an existing course transfer credit model that they have previously created, or begin creating a new model.

Page Name	Object Name	Navigation	Usage
Transfer Credit Model Information	SS_TRCR_TARGET	Self Service, Transfer Credit Click the Create New Model button on the Evaluate My Transfer Credit page.	Individuals can use this page to select the required target information for their course transfer credit model. Target information includes the academic career, program, and plan to which they want to apply the course transfer credit, and the articulation term. To assist individuals in entering this information, the page elements prompt against the academic institution, academic career, academic program, academic plan and term tables.
Transfer Credit Source Information	SS_TRCR_SOURCE	Self Service, Transfer Credit Click the Next button on the Transfer Credit Model Information page.	Individuals can use this page to enter the external organization or internal academic institution from which the individual is transferring. To assist individuals in entering this information, the page elements prompt against the course transfer rules tables to ensure that you institution has established a course transfer rule for the external organization or internal academic institution.
Current Coursework	SS_TRCR_INTCR	Self Service, Transfer Credit Select a source career and institution and click the Next button on the Transfer Credit Source Information page.	Individuals who are creating internal course transfer credit models can use this page to view their coursework for at the specified internal academic institution. The system automatically loads their enrollment information into the page.

Page Name	Object Name	Navigation	Usage
Education Data	SS_TRCR_EDUC	Self Service, Transfer Credit Select an external institution and click the Next button on the Transfer Credit Source Information page.	Individuals who are creating external course transfer credit models can use this page to enter their external education information. This information includes the external year and term, term type, external subject area, course number, units taken, and grade received. The system does not uses the education data table to retrieve and store this information. The system instead requires the individual to enter the information, which it then stores on a set of tables unique to the Self-Service Modeling Transfer Credit feature.
Transfer Credit Results	SS_TRCR_RSLT	Self Service, Transfer Credit Click the Submit button on the Education Data page or on the Current Coursework page.	Individuals can use this page to view the results of the Self-Service Transfer Credit Evaluation process for the model. The system displays the transfer credit summary report in a grid at the bottom of the page. Individuals can use the browser print function to print the page. Individuals can click the View Details button to see additional information about the incoming courses and their internal equivalents. The evaluation is tentative pending final review by your academic institution.
Transfer Credit Results Detail	SS_TRCR_RSLT_DTL	Self Service, Transfer Credit Click the View Transfer Equivalency Details button on the Transfer Credit Results page.	Individuals can use this page to view incoming course and internal equivalent information. The system displays each incoming course beside its internal equivalent course. The system captures but hides the valid attempts, earn credit, and include in GPA fields.

Page Name	Object Name	Navigation	Usage
Process A Degree Progress Report	SS_TRCR_AA_RQST	Self Service, Transfer Credit Click the Next button on the Transfer Credit Results page.	Individuals can use this page to run a degree progress audit report to see how the internal equivalents of their transfer credit model apply towards their degree requirements. The report process combines PeopleSoft Academic Advisement what-if and course list what-if functionality. In PeopleSoft Academic Advisement, you can apply degree requirements to students based on their academic career, program, plan, and subplan. A what-if scenario enables you to select this academic structure information and run a process to see what requirements a student needs for graduation.
Modeling Transfer Credit - View Degree Progress Report	SS_TRCR_AA_RSLT	Self Service, Transfer Credit Click the Next button on the Process A Degree Progress Report page.	Individuals can use this page to view the what-if degree progress report, showing them their possible degree progress based on the transfer credit model. For visitors, the process uses the target academic program and internal equivalent courses, which become the what-if courses, during the creation of the degree progress report. For applicants and students, the process uses the target academic program and internal equivalent courses of the model, completed and posted transfer credit models, and enrollment records during the creation of the degree progress report.

CHAPTER 15

Using Self-Service Student Recruiting

The chapter discusses using self service student recruiting.

Using Self Service Student Recruiting for Recruiting and Admissions

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

Prerequisites

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

Pages Used to Manage Student Recruiting for Recruiting and Admissions

Page Name	Object Name	Navigation	Usage
Prospects by Category - Select Search Criteria	SS_ADM_PRS_REQ_CAT	Self Service, Student Recruiting, View Prospects by Category	Recruiting officers use this page to search for prospects by category.
Prospects by Category - Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Program Detail link on any one of the prospect search results pages.	Recruiting officers use this page to view program details for a prospect.
Prospects by Organization - Select Search Criteria	SS_ADM_PRS_REQ_ORG	Self Service, Student Recruiting, View Prospects by Organization	Recruiting officers use this page to search for prospects by organization.
Prospects by Organization - Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization - Select Search Criteria page.	Recruiting officers use the page to view prospect search results.

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

CHAPTER 16

Using Self-Service Advisement

This section discusses viewing advisee information through pages in Campus Self Service.

Viewing Advisee Information Through Self-Service Pages

This section discusses how advisors can view an advisee's roster, view an advisee's academic program information, and view a new/drop-in advisee's roster.

Pages Used to View Advisee Information Through Self-Service

Page Name	Object Name	Navigation	Usage
View My Advisees	SS_ES_GRADE_LISTA	Self Service, Advisement, View Advisee Information	Advisors can view all of their advisees' class schedules, enrollment appointments, term grades, degree progress reports, transfer credit reports, and unofficial transcripts.
Advisement Committee Members	SS_ADV_COMM_MEMB	Click a committee name on the View My Advisee page.	Review committee members and their roles. Send notification to all or a selected group of committee members.
Academic Information	SS_ADV_STUDACAD1	Select Academic Information in the Student Details field on the View My Advisee page.	Advisors can view an advisee's academic program information, which includes the advisee's academic program, academic career, desired degree, and major.
Current Addresses	SS_AA_ADDRESSES	Select Addresses in the Student Details field on the View My Advisee page.	Advisors can view an advisee's addresses.
<Advisee's name> Class Schedule	SSR_SSENRL_LIST1	Select Class Schedule in the Student Details field on the View My Advisee page.	Advisors can view an advisee's class schedule.
Degree Progress Report	SS_ES_AARPT_TYPE	Select Degree Progress in the Student Details field on the View My Advisee page.	Advisors can view an advisee's degree progress report.

Page Name	Object Name	Navigation	Usage
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on Degree Progress Report page.	Advisors can run a quick what-if scenario for their advisee's.
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on Degree Progress Report page.	Advisors can run course list what-if scenarios for their advisee's.
Emergency Contacts List	SS_AA_EMRG_CNTCT	Select Emergency Contacts in the Student Details field on the View My Advisee page.	Advisors can view an advisee's emergency contact information.
Enrollment Appointment	SS_ES_ENRL_APPT	Select Enrollment Appointment in the Student Details field on the View My Advisee page.	Advisors can view an advisee's enrollment appointments.
Advisee Grade Inquiry	SS_ES_GRADE_LIST	Select Grades in the Student Details field on the View My Advisee page.	Advisors can view an advisee's grades.
Send Notification	CS_NOTIF	Select Send Notification in the Student Details field on the View My Advisee page.	Advisors can send notifications to their advisee's.
Current Phone Numbers	SS_AA_PERS_PHONE	Select Telephone in the Student Details field on the View My Advisee page.	Advisors can view an advisee's phone numbers.
To Do List Summary	SS_AA_TODOS	Select To Do List in the Student Details field on the View My Advisee page.	Advisors can view an advisee's to do list summary.
View Transfer Credit Report	SS_TRCR_RPT	Select Transfer Credit Report in the Student Details field on the View My Advisee page.	Advisors can view an advisee's transfer credit report.
Unofficial Transcript	SS_ES_AARPT_TYPE2	Select Unofficial Transcript in the Student Details field on the View My Advisee page.	Advisors can view an advisee's unofficial transcript.
Weekly Schedule	SS_WEEKLY_SCHEDULE	Select Weekly Schedule in the Student Details field on the View My Advisee page.	Advisors can view an advisee's weekly schedule.
My Advisee – <Advisee's Name>'s Service Indicators	SS_AA_CC_HOLDS	Click the positive or negative service indicator icon on the on the View My Advisee page.	Advisors can view an advisee's service indicators.
<Advisee's Name> Releasable FERPA Information	SSR_AA_FERPA	Click the FERPA icon on the View My Advisee page when an advisee has requested information be restricted from release.	Advisors can view advisee's releasable directory information.

Page Name	Object Name	Navigation	Usage
New/Drop-In Advisees	SS_ADV_ANYONE	Self Service, Advisement	Advisors can view class schedules, enrollment appointments, grades, degree progress, and unofficial transcripts for new and drop-in advisees.

Processing Self-Service Advisement Reports

The self-service Degree Progress Report feature enables students and advisors to process and view advisement reports that you define for self-service processing. Users of this feature can conduct what-if scenarios and explore the course requirement consequences of completing additional coursework, or changing the student's major, minor, subplan, and requirement term.

See Chapter 13, "Using Self-Service Degree Progress/Graduation," page 143.

Prerequisites

Before individuals at your institution can use the self-service Degree Progress report feature, you must:

- Assign student users an active program, a user ID, and a password.
- Assign advisors a valid user ID and password.
- Set up a self-service advising transcript type.

Pages Used to Perform Self-Service Advising

Page Name	Object Name	Navigation	Usage
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service, Degree Progress/Graduation, View Degree Progress Report	Students and advisors use this page to assess academic progress toward graduation. Students and advisors can run what-if reports to simulate additional coursework completion or to simulate a different academic career, program, plan, or subplan.
Report Results	SS_REPORT_RESULT_A	• Self Service, Degree Progress/Graduation, View Degree Progress Report, Report Results • Self Service, Academic Records, View Unofficial Transcript, Report Results	Students and advisors use this page to view the academic advisement report.
View Previously Requested Reports	SS_STUREQ_RSLT	Click the View a Report that you had previously requested link on the Degree Progress Report page or Unofficial Transcript page.	Students and advisors use this page to review reports that they requested in the past. To view a specific report, students click the corresponding Go button.
Degree Progress Report - Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Students and advisors use this page to enter hypothetical career, program, subplan, and requirement term information. Students or advisors must enter a required term for every career, program, plan, or subplan override option that they specify.
Degree Progress Report – Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Students and advisors use this page to enter hypothetical coursework data.
Course List What-If Analysis Report - Course Search	STDNT_CRSE_SECPNL	Click the Search button on the Degree Progress Report - Course List What-If Analysis page.	Students and advisors use this page to select courses for their Course List Analysis report.

CHAPTER 17

Using Self-Service Outreach

PeopleSoft Outreach is a self-service application that provides tools and features for two roles within your organization: the development outreach officer and the student recruiting officer. The fundraising portion of the application is designed to help the outreach officer focus on the prospect, not the process.

This chapter relates specifically to the outreach officer; student recruiting officer documentation is part of PeopleSoft Recruiting and Admissions. Specifically, this chapter provides an overview of PeopleSoft Outreach for fundraising and discusses how to:

- Create and maintain the My Prospects workset.
- Manage an action plan.
- Manage prospect strategies.
- Manage prospect actions.
- Analyze prospect information.

Understanding PeopleSoft Outreach for Fundraising

This section lists prerequisites and discusses PeopleSoft Outreach for fundraising.

Prerequisites

The target users of PeopleSoft Outreach include organization employees designated as prospect managers, outreach officers, or other advancement officers who may travel frequently.

Because of the extensive clearance process that exists at many philanthropic organizations, PeopleSoft Outreach strategy and action pages provide records for only those IDs that are actual prospects of the user. These prospects are contained in the user's My Prospects workset, which is created on the AV_WORKSET and AV_WORKSET_MBR records.

Various resource assignment processes within PeopleSoft Enterprise Contributor Relations manage additions to the My Prospects workset. When a new assignment is made, the system adds the EMPLID or EXT_ORG_ID of the newly assigned prospect to the user's My Prospects workset. Likewise, when an assignment is no longer active, the system removes the EMPLID or EXT_ORG_ID of the prospect from the My Prospects workset. PeopleSoft Outreach contains a workset initialization and maintenance process, the My Prospects Application Engine process (AV_WS_MYPROS) that controls additions and removals by regenerating the My Prospects workset each time that users run it.

See Also

Chapter 15, "Using Self-Service Student Recruiting," page 151

PeopleSoft Outreach Business Processes

For the outreach officer who travels a great deal, PeopleSoft Outreach provides a way to easily manage constituent and prospect data while away from the office. The self-service application gives users quick access to the information that they need to cultivate and communicate with constituents and donor prospects. The application also filters and organizes the information and efficiently presents it on self-service pages.

Typically, outreach officers are assigned a number of constituents to manage through the development lifecycle. This lifecycle includes identifying constituents, informing them of relevant news about the organization's fundraising efforts, gaining their interest in the organization's mission, involving them in activities, and helping them invest in the organization's future. PeopleSoft Outreach presents tools to analyze prospects and to develop strategies to move these constituents through the development lifecycle. The prospects that outreach officers manage are generally in the interested, involved, or ready to invest steps of the lifecycle.

PeopleSoft Outreach comprises four major processes:

1. My Action Plan.
2. Prospect Strategy.
3. Prospect Actions.
4. Prospect information views for analysis.

PeopleSoft Outreach uses PeopleSoft Enterprise Contributor Relations workset functionality to build the My Prospects workset through which a user can easily progress. Building a prospect workset creates a smaller subset of the database, which contains only those IDs that are relevant to the outreach officer.

Creating and Maintaining the My Prospects Workset

To use the action and strategy management pages in PeopleSoft Outreach, users need a current My Prospects workset. Your organization can initialize and maintain this workset by running the My Prospects process as well as by assigning resources within PeopleSoft Enterprise Contributor Relations.

This section discusses how to:

- Run the My Prospects process.
- Assign resources to the My Prospects workset.

Page Used to Create and Maintain the My Prospects Workset

Page Name	Object Name	Navigation	Usage
Outreach Workset Initialization/Maintenance	AV_RUNCTL_OUTR	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Outreach WS Initialization	Run the My Prospects process to generate or regenerate My Prospects worksets for outreach officers.

Running the My Prospects Process

Access the Outreach Workset Initialization/Maintenance page.

When users run this process, the system does the following:

1. Empties the workset tables AV_WORKSET and AV_WORKSET_MBR for the My Prospects workset.
2. Selects records from resource assignment tables based on the following conditions:

Table	Conditions
AV_ASGN_STF_PRP	Include on START_DT < current date and end date > current date
AV_PG_STAFF	Include on START_DT < current date and end date > current date
AV_CNST_ACTN	Include as SLCTR_ID or RSPL_ID and action expiration or complete date + 30 days < current date
AV_CNST_AC_ASGN	Include as STAFF_ID and action expiration or complete date + 30 days < current date

3. Inserts the selected records into the My Prospects workset on the workset tables AV_WORKSET and AV_WORKSET_MBR for any user that has both a STAFF_ID on the AV_STAFF table and a user ID for access to the system.

   The process ignores assignments that are made to someone who is not also a system user. Because staff and volunteers exist in the same AV_STAFF record, volunteers who also have system user IDs have a My Prospects workset built for their user ID.

Use the Process Monitor to review the status of the process. Users can configure Process Scheduler to generate the workset at user-defined intervals.

Note. PeopleSoft recommends that you schedule the My Prospects process to run nightly, to keep the My Prospects worksets current for all users.

The functionality of Contributor Relations Outreach is fully realized when each prospect has a constituent type assigned.

Assigning Resources to the My Prospects Workset

There are several resource assignment pages within PeopleSoft Enterprise Contributor Relations that enable you to assign a prospect to an outreach officer. Those additions immediately update their My Prospects workset (or create one, if one does not already exist), regardless of whether the My Prospects process has been run.

The following table lists all PeopleSoft Enterprise Contributor Relations pages where you can assign a prospect to an outreach officer, thus updating the My Prospects workset:

Contributor Relations Page or Component	Assignment Condition
Resource Assignment component	Any staff or volunteer assignment for a user who also has a system user ID.

Contributor Relations Page or Component	Assignment Condition
Mass Assign Staff page	Any staff or volunteer assignment for a user who also has a system user ID.
Workset Mass Assignments component	Any staff or volunteer assignment for a user who also has a system user ID.
Prospect Action page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Action Info page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Mass Actions 1 page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Mass Actions 2 page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Workset Mass Actions component	Any user assigned as the responsible person, solicitor, or an assigned resource.
Bequest Detail page	Assigned bequest internal resources on the AV_PG_STAFF record.
Trust Detail page	Assigned trust internal resources.
Gift Annuity Detail page	Assigned gift annuity internal resources.
Pooled Income Information page	Assigned pooled income internal resources.

Note. A deletion from any one of these pages or components affects the My Prospects workset only when the My Prospects process runs.

Managing An Action Plan

The links under My Action Plan on the Outreach Home page enable outreach officers to review reminders and manage action plans. This section discusses how to:

- Review reminders.
- View assigned actions.

Pages Used to Manage an Action Plan

Page Name	Object Name	Navigation	Usage
My Reminders	AV_MYREMINDERS	Self Service, Outreach, My Prospects, My Reminders	View actions that need immediate or current attention.
My Action Plan	AV_OUTR_TODO_LIST	Self Service, Outreach, My Prospects, My Action Plan	View all actions.

Reviewing Reminders

The My Reminders page appears even if there are no reminders. For reminders to appear, the user's ID must have at least one prospect action assigned to it.

This page displays actions in three categories − Past Due, Due Today, and Upcoming − based on the planned date. The system sorts the reminders to display in alphabetical order. Prospects are constituents that are affected by the action. Users click an action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type field describes the type of action required. Action type values are defined on the Action Types page. The Planned Date and Complete Date fields show when the action is intended to occur and when it actually occurred. The Action Status field lists whether the action is *Scheduled, Pending, On Hold, Completed,* or *Cancelled.* The organization can add additional status values on the Setup Action Status page. The Result field displays the outcome of the action.

Users enter the number of upcoming days for which to display reminders (based on the planned date). The default display is the current date plus seven. To expand or shorten the displayed list, users enter a new value in the Number of Upcoming Days field and click the Refresh button. Users click the Save as Default button to save the value in this field as the new default display period for that user.

Users click the Outreach link on the portal navigation to return to the Outreach navigation page. If they have modified the number of upcoming days, the system prompts them to save their changes.

Viewing Assigned Actions

The My Action Plan page appears even if there are no action plan items. For items to appear, the user's ID must have at least one prospect action assigned to it.

This page populates with all current (incomplete) actions that are less than or equal to today's date and the value of the Reminder Days field defined on the CR Installation page. To choose a different range of actions, users first must select an institution, then enter a date range. When they click the Refresh button, the page displays actions that are assigned to the user that meet the institution and date criteria, sorted in alphabetical order by prospect name. Prospects are constituents that are affected by the action.

Users click an action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type field describes the type of action required. Action type values are defined by your organization on the Action Types page. The Planned Date and Complete Date fields show when the action is intended to occur and when it actually occurred. The Action Status field lists whether the action is *Scheduled, Pending, On Hold, Completed,* or *Cancelled.* The organization can add additional status values on the Setup Action Status page. The Result field displays the outcome of the action.

Managing Prospect Strategies

This section discusses how to:

- Select a prospect name.
- Edit or add a prospect strategy.
- Edit or add prospect strategy details.
- Link a prospect strategy with initiatives.
- Link a prospect strategy with actions.
- View a prospect strategy summary.

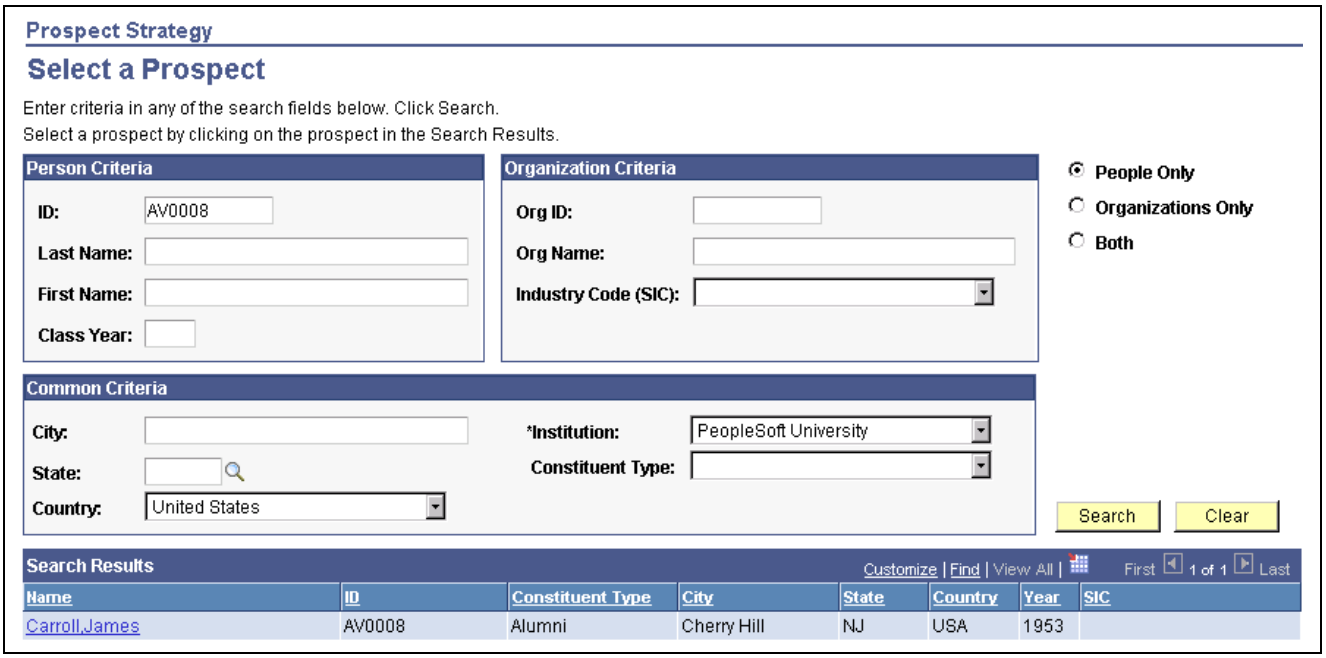
Pages Used to Manage Prospect Strategies

Page Name	Object Name	Navigation	Usage
Prospect Strategy − Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update a Strategy	Search for and select a prospect strategy record from the My Prospects workset.
Prospect Strategy − Edit Strategy	AV_OUTR_STRT_LIST	Click a prospect name in the Search Results area of the Prospect Strategy − Select a Prospect page.	Select a prospect strategy to edit, add, or delete.
Prospect Strategy − Strategy Detail	AV_OUTR_STRT_DTL	Click a link under the Strategy Name heading or click the Add a Strategy button on the Prospect Strategy − Edit Strategy page.	Enter or update a specific strategy plan for cultivating the prospect.
Prospect Strategy − Linked Initiatives	AV_OUTR_STRT_INIT	Click the Next button on the Prospect Strategy − Strategy Detail page.	Link a prospect strategy to one or more initiatives, if appropriate.
Prospect Strategy − Linked Actions	AV_OUTR_STRT_ACTN	Click the Next button on the Prospect Strategy − Linked Initiatives page.	Link a prospect strategy to one or more actions. Users can also use this page to view linked spouse actions.
Prospect Strategy − Summary	AV_OUTR_STRT_SMRY	Click the Next button on the Prospect Strategy − Linked Actions page.	View and print a prospect strategy summary.

Selecting a Prospect Name

To add or update prospect strategies, outreach officers must first access the Prospect Strategy page, search their prospect workset, and select a prospect name. Once users select a name, they can then add new strategies or edit existing ones on that prospect record.

Access the Prospect Strategy − Select a Prospect page.



Prospect Strategy - Select a Prospect page

To search for a prospect, users must select an institution and any additional combination of search values.

When users click the Search button, the results appear at the bottom of the page in alphabetical order. At any point, users can clear search values.

Note. Search pages for strategies and actions in PeopleSoft Outreach only populate with members of the My Prospects workset.

The following format restrictions apply to the fields on this page: The Class Year field must be in CCYY format (century/year), the value in the City field must use initial capitals and include spaces between words, and the value in the Org Name field must be uppercase and exclude spaces between words. In addition, note that the ID fields (Last Name, First Name, and Org Name) convert to uppercase when users click the Search button.

Person Criteria

The fields in this group box apply only to person records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Organization Criteria group box.

To search for a person, users can enter an employee ID, first name, last name, or class year.

Organization Criteria

The fields in this group box apply only to organization records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Person Criteria group box.

To search for an organization, users can enter values in the Org ID, Org Name, or Industry Code (SIC) fields.

Common Criteria

You can use the fields in this group box to search for people, organizations, or both.

The system populates the Institution and Country fields by default. The default country value depends on your installation setup, but you can change the value here. The values in the State field depend on the country selected.

Constituent Type field values relate specifically to either people or organizations. The value that you select affects your search results. For example, if you search for organizations but choose a person constituent type of *Alumni,* the search returns no prospect records.

Note. Valid constituent types are shipped with your system and should not be altered.

Examples

Here are three examples of search results:

- If you enter a city and a constituent type, the search results display all prospects with the selected constituent type who live in that city.
- If you enter a person ID, but select the Organizations Only search option, the system ignores the values in the Person Criteria group box.

  The search results display no people, but display all organizations that meet the common criteria.
- If you enter a person's partial last name and a partial organization name, and then select the Both search option, the system searches for person and organization prospects that meet the criteria in either group box.

  The search results display all people and all organizations that meet the partial name criteria.

Editing or Adding a Prospect Strategy

Access the Prospect Strategy − Edit Strategy page.

To edit an existing strategy, users click a link under the Strategy Name heading. If there are no existing strategies for the prospect and users want to add a new strategy, they click the Add a Strategy button. Both the link and the button take users to the Prospect Strategy − Strategy Detail page. If users are adding a new strategy, they must enter the strategy detail information on the Prospect Strategy − Strategy Detail page. If users are editing an existing strategy, the system populates the Prospect Strategy − Strategy Detail page with the existing data.

To remove an entire strategy from a prospect's record, users select the appropriate check box and click the Delete button. A warning message appears, asking users to click the OK button to confirm the deletion or click the Cancel button to return to the Prospect Strategy − Edit Strategy page. Users can delete multiple strategies at once.

Editing or Adding Prospect Strategy Details

Access the Prospect Strategy − Strategy Detail page.

Page Layout

All of the Prospect Strategy pages display the same information at the top of the page: the step of the process, the prospect's name, email address, highest-ranking constituent type, and the name of the assigned prospect manager. Users can click the email address link to launch their email program and send a message to the prospect, then return to this page in the process. For a prospect who is a person, users can access the Constituent Type Summary page, which lists all assigned constituent types for the prospect.

Several buttons appear in the upper right corner of the page:

	Assign or view communication records for the prospect.
	Assign or view checklists for the prospect.
	Add a comment or view a list of all comments about the prospect.
	View details about the service restrictions that are associated with negative service indicators for the prospect.
	View details about the positive service indicators for the prospect.

In addition, the navigation buttons on this page apply to all of the Prospect Strategy pages.

Strategy Detail

In this section, users enter or change a strategy name, select its status, and choose whether to link the strategy to the prospect's spouse and manage the prospects as a couple.

Note. The Apply Strategy to Spouse option is only available if a spouse exists for the prospect in the system.

Users can also enter or edit a detailed strategy description using the long free-text description field and mark the date and time of each descriptive entry.

Linking a Prospect Strategy with Initiatives

Access the Prospect Strategy − Link Strategy to Initiatives page.

The instructions on the page lead the user through this optional process of linking an initiative to the strategy. Adding a campaign initiative to a prospect's strategy results in the prospect being identified as a prospect for that campaign. Users select an initiative type from the available options. In addition to these delivered types, the organization can define more types on the Setup Initiative Types page. After selecting the type, the user enters an initiative of that type or selects one from the prompt.

Linking a Prospect Strategy with Actions

Access the Prospect Strategy − Linked Actions page.

Outreach officers can use the Prospect Strategy − Linked Actions page to manage specific actions to achieve the strategy. The page instructions lead users through the process of editing any existing actions; users can also click the Add an Action button to link new ones. Any actions previously added and linked to the strategy appear on this page. Users click a link under the Action heading to display the populated Prospect Action − Action Detail page; they click the Add an Action button to display a blank Prospect Action − Action Detail page.

This page also displays any actions that have been added to a spouse's record that are linked to this strategy. Again, users click the Action link to display the Prospect Action − Action Detail page.

See Also

Chapter 17, "Using Self-Service Outreach," Editing or Adding Prospect Action Details, page 168

Viewing a Prospect Strategy Summary

Access the Prospect Strategy − Strategy Summary page.

Users can print the page using their web browser's print functionality (File, Print or CTRL+P). Users can edit any section or click the appropriate number in the upper left portion of the page to return to the step that enables them to edit that part of the process.

To return directly to the summary from the edited step, the user can click the last of the numbered circles in the upper left corner of the page.

After viewing the summary information, users must save the transaction if they did not save the strategy in a prior step.

Managing Prospect Actions

This section discusses how to:

- Select a prospect name prior to managing prospect actions.
- Edit or add a prospect action.
- Edit or add prospect action details.
- (Optional) Edit or add ask information.
- (Optional) Edit or add prospect action descriptions.
- Assign resources to prospect actions.
- Link prospect actions to initiatives.
- View a prospect action summary.
- Select a prospect name prior to completing an action.
- Select an action to complete.
- Complete a prospect action.
- Select a prospect name prior to completing a contact report.
- Enter contact report details.
- View a contact report summary.
- Send a contact report.
- Send updated biographic information.

Pages Used to Manage Prospect Actions

Page Name	Object Name	Navigation	Usage
Prospect Action − Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update an Action	Search for and select a prospect action record from the My Prospects workset.

Page Name	Object Name	Navigation	Usage
Prospect Action − Edit Action	AV_OUTR_ACTN_LIST	Click a name in the Search Results area of the Prospect Action − Select a Prospect page.	Select a prospect action to edit.
Prospect Action − Action Detail	AV_OUTR_ACTN_DTL	Click a link under the Action Description heading or click the Add an Action button on the Prospect Action − Edit Action page.	Enter or update an action step for a prospect that will be carried out by a staff member or volunteer.
Prospect Action − Ask Information	AV_OUTR_ACTN_ASK	Click the Next button on the Prospect Action − Action Detail page.	Enter details about an action that includes a donation request (ask). If the action type on the Prospect Action − Action Detail page is not *Ask,* users should skip this page.
Prospect Action − Action Description	AV_OUTR_ACTN_DSCR	Click the Next button on the Prospect Action − Ask Information page.	Enter detailed information related to the action. If the action does not require further description, users can skip this page.
Prospect Action − Assigned Resources	AV_OUTR_ACTN_ASGN	Click the Next button on the Prospect Action − Action Description page.	Assign other resources to the action. If appropriate, users can skip this page.
Prospect Action − Linked Initiatives	AV_OUTR_ACTN_INIT	Click the Next button on the Prospect Action − Assigned Resources page.	Link campaign, event, membership, volunteer, or other initiatives to the action. If appropriate, users may skip this page.
Prospect Action − Summary	AV_OUTR_ACTN_SMRY	Click the Next button on the Prospect Action − Linked Initiatives page.	View and print a prospect action summary.
Prospect Action Results − Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Complete an Action	Search for and select a prospect record from the My Prospects workset that has an action to complete.
Prospect Action − Results − Edit Action	AV_OUTR_RSLT_LIST	Click a name in the Search Results area of the Prospect Action Results − Select a Prospect page.	Select a specific action to complete.
Prospect Action − Results	AV_OUTR_ACTN_RSLT	Click a link under the Action Description heading on the Prospect Action − Results − Edit Action page.	Enter the specific results of a completed action.

Page Name	Object Name	Navigation	Usage
Prospect Contact Report − Select a Prospect	AV_OUTR_SRCH	Self Service, Outreach, My Prospects, My Stewardship Plans, Complete Contact Report	Search for and select a prospect record from the My Prospects workset to complete and send a contact report.
Prospect Contact Report − Detail	AV_OUTR_ACTN_CNCT	Click a name in the Search Results area of the Prospect Contact Report − Select a Prospect page.	Enter constituent contact report details.
Prospect Contact Report − Summary	AV_OUTR_ACTN_CSMRY	Click the Printer Friendly Version link on the Prospect Contact Report − Detail page.	View a printable summary of all information on the contact report.
Send Contact Report	AV_OUTR_CNCT_SEND	Click the Send Report button on the Prospect Contact Report − Detail page.	Send a completed contact report to a list of users.
Send BioDemo Update	AV_OUTR_BIO_SEND	Click the Send BioDemo Update button on the Prospect Contact Report Detail page.	Send updated biodemo data, learned during a prospect contact, to the department responsible for updates to biodemo data.

Selecting a Prospect Name Prior to Managing Prospect Actions

Outreach officers can manage prospect actions by using the three links on the Outreach Home page. Their options are to add or update an action, complete an action, or complete a prospect contact report.

To add or update prospect actions, outreach officers must first access the Prospect Action page, search their prospect workset, and select a prospect name. When users select a name, they can then add new actions or edit existing ones on that prospect record.

See Also

Chapter 17, “Using Self-Service Outreach,” Selecting a Prospect Name, page 162

Editing or Adding a Prospect Action

Access the Prospect Action − Edit Action page. This page lists each action associated with the prospect, its status, and its planned completion date.

To edit an existing action, users select an action description. If there are no existing actions for the prospect and users want to add a new action, they click the Add an Action button. Both the link and the button access the Prospect Action − Action Detail page. If users are adding a new action, they must enter the action detail information on the Prospect Action − Action Detail page. If users are editing an existing action, the system populates the Prospect Action − Action Detail page with the existing data.

Editing or Adding Prospect Action Details

Access the Prospect Action − Action Detail page.

Users enter or change an action description and select its status from the available options. Next, users enter an expected completion date for the action as well as a date the action expires if it is not completed. The action no longer displays in the current actions lists on the My Reminders page when the action is expired. It does appear on the My Action Plan page if the date range entered includes the action date of the expired action. The expected completion date displays in grids as the planned date. Users also have options to select an action type and method of contact. Available values for the Action Type and Method fields on this page are defined by the organization. To complete the action, users select a responsible person. When users enter the responsible person's ID, the responsible person's name appears to the right of the ID field. Finally, users may select the strategy that this action supports.

Note. The values for the Responsible Person Type field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

See Also

Chapter 17, "Using Self-Service Outreach," Editing or Adding Prospect Strategy Details, page 164

Editing or Adding Ask Information

Access the Prospect Action − Ask Information page.

If the action type is *Ask,* outreach officers must enter specific ask information on the Prospect Action − Ask Information page. Users enter the monetary range (From and To amounts) that will be requested as a donation. The type of solicitor for the donation and the solicitor name are required if the action is an ask. Only resources defined with a role of Solicitor (*SOL*) display in the Solicitor field.

Note. The values for solicitor type are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

Editing or Adding Prospect Action Descriptions

Access the Prospect Action page.

This page contains a 254 character free-form text field in which outreach officers can enter brief details of the action. Users can mark the date and time of each descriptive entry by clicking the Date/Time Stamp button.

Assigning Resources to Prospect Actions

Access the Prospect Action − Assign Others to Action page.

If users want to assign additional resources to the action, they can add them on the Prospect Action − Assigned Resources page. Assigned resources assist the outreach officer in completing the action either by providing information or by actual involvement in the action itself. Roles indicate the assigned resource's relation to the action; these values are defined by the institution.

To add a resource, users select the resource type, and then enter the role and the ID of the resource assigned.

Note. The values for the Resource Assigned field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

Linking Prospect Actions to Initiatives

Access the Prospect Action − Link Initiatives to Action page.

If outreach officers want to link initiatives to an action, they can add them on the Prospect Action − Linked Initiatives page. Linking a campaign initiative to an action means that the prospect appears on the prospect list for that campaign. To begin, users click the Add an Initiative button. Next, they enter an initiative type and initiative code. The name of the initiative appears to the right of the code. Initiative type code values are defined by the organization on the Initiative Types page.

Viewing a Prospect Action Summary

Access the Prospect Action − Action Summary page.

When the outreach officer finishes entering or editing all of the desired action information, the Prospect Action − Summary page appears. Users can print the page using their web browser's print functionality (File, Print or CTRL+P). If users want to edit a section, they can return to the step that enables them to edit that part of the process by clicking the Edit button.

To return directly to the summary from the edited step, the user can click the last of the numbered circles in the upper left corner of the page.

When finished viewing the summary information, users must save the transaction if they want to keep it and have not saved in an earlier step.

Selecting a Prospect Name Prior to Completing an Action

To complete prospect actions, outreach officers must first access the Prospect Action - Results page, search their prospect workset, and select a prospect name. When users select a name, they can then complete actions on a prospect record.

See Also

Chapter 17, "Using Self-Service Outreach," Selecting a Prospect Name, page 162

Selecting an Action to Complete

Access the Prospect Action − Results − Edit Action page.

This page lists each action associated with the prospect, its status, and its planned date for completion. Outreach officers click a link under the Action Description heading to choose the action that they want to complete; the system displays the Prospect Action − Results page.

Completing a Prospect Action

Access the Prospect Action − Results page. In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Action Results

Outreach officers select an action status; the status has a default value of *Complete.* Users also must select a result code. The organization may define other values as well.

Next, users complete the Complete Date field. The current date appears by default the first time that the page is accessed for an action, but the default value can be overwritten. If the ask resulted in a commitment, enter the expected commitment amount, or the monetary amount that you expect to receive from the donor because of this action. The Actual Commitment field displays the monetary amount that the organization received because of this action.

Action Results − Pledge

Users can enter the pledge number for a pledge that resulted from the action. Users click the Details link to view the Pledge Detail page.

Action Gifts

Users can enter the gift number for a gift that was received as a result of the action. Users click the Details link to view the Gift Detail page. To add another gift to the action results, users click the Add a gift button. Users click the Add another Action button to start the process for creating a new action for that prospect.

When saving the page, if the user entered a gift number, the date and gift amount appear to the right of the gift number. The process works similarly if a user enters a pledge number. The date and time that the action was last updated appear at the bottom of the page.

Users can click the Contact Report button to go directly to the Prospect Contact Report page.

See Also

Chapter 17, “Using Self-Service Outreach,” Entering Contact Report Details, page 171

Selecting a Prospect Name Prior to Completing a Contact Report

There are two ways in which users can complete a contact report:

- If they are at the end of the process for completing an action, they can click the Contact Report button on the Prospect Action − Results detail page.

  The system displays the Prospect Contact Report − Detail page.

- If they are at the beginning of the process for completing a contact report, they must first access the Prospect Contact Report page, search their prospect workset, and select a prospect name.

  When users select a name, they can then complete a contact report for that prospect.

See Also

Chapter 17, “Using Self-Service Outreach,” Selecting a Prospect Name, page 162

Entering Contact Report Details

Access the Prospect Contact Report page. In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Contact Report Detail

Outreach officers first enter their author ID (which is the user ID by default) and the report date (which is the current date by default). Users can view a printer-friendly version of the Prospect Contact Report summary page.

The Report field is a long free-form text area where outreach officers can enter any details of the prospect contact, such as what happened as a result of the action or notes about possible further contacts. Users click the Date/Time Stamp button to mark the date and time of each descriptive entry. If users learn new information about a new prospect, they can link other prospects to this contact report by using the Link Report to Other Prospects section.

Link Report to Other Prospects

To link the report to a prospect's spouse, click the Link to Spouse button. The spouse ID displays in the ID field. Users can then access the same contact report through either the prospect ID or the spouse ID.

Note. The Link to Spouse button only appears if a spouse exists for the prospect in the system.

To link the report to other prospects, users select a value in the ID Type field and enter an ID. The linked prospect's name appears to the right of the ID. ID type values are delivered by the system. To link to more than one prospect, users click the Link another Prospect button. Users can also click the Delete button to unlink any currently linked prospects from the action.

Users click the Save button to save the contact report. The date and time that the action was last updated appear above the Report field. Users click the Send Report button to access the Send Contact Report page. Users click the Send BioDemo Update button to access the Send BioDemo Update page.

See Also

Chapter 17, "Using Self-Service Outreach," Sending a Contact Report, page 172

Chapter 17, "Using Self-Service Outreach," Sending Updated Biographic Information, page 173

Viewing a Contact Report Summary

Access the Prospect Contact Report − Contact Report Summary page.

Users can review all contact report information online or print the complete contact report page as well, using their web browser's Print functionality (File, Print or CTRL+P).

After printing or viewing, users can return to the Prospect Contact Report − Detail page.

Sending a Contact Report

Access the Send Contact Report page.

When outreach officers complete a contact report and are ready to distribute it, they can use this page to send it to anyone in the organization. They can define their distribution list by selecting the ID type of the recipients and entering the distribution ID. A user can also select a *Role* ID type to send the report to all users with the selected security role. They can also enter any other email address list members that they want to include in the distribution, separating multiple email addresses with a semicolon. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security − User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and action description. The Email Text field contains the outreach officer's name and the entire contents of the contact report from the Prospect Contact Report Detail page. Users can edit any field and add any discussion text necessary.

When finished, users click the Send button to trigger the workflow that sends the contact report to the defined distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report Detail page.

Sending Updated Biographic Information

Access the Send BioDemo Update page.

During the course of managing a prospect, outreach officers occasionally learn new biodemo information. This page enables users to distribute this new information to anyone in the organization. They can define their distribution list by selecting the ID type of the recipients and entering their distribution ID. A user can also select a *Role* ID type to send the report to all users with the selected security role. They can also enter any other email address list members that they want to include in the distribution, separating multiple email addresses with a semicolon. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security − User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and ID. The Email Text field begins with the outreach officer's name; users can then enter any updated information that is associated with the prospect.

When finished, users click Send to trigger the workflow that sends the contact report to the distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report − Detail page.

Analyzing Prospect Information

PeopleSoft Enterprise Contributor Relations provides a number of pages that outreach officers can use to analyze prospect information. PeopleSoft Outreach offers a menu structure that gathers and delivers an assortment of pages that facilitate an outreach officer's responsibilities. The links within these pages lead to either a run control page for a report or an inquiry page of summarized prospect information. These pages are not limited to the My Prospects workset and may be accessed for any constituent in the system.

This menu contains submenu links to personal information, organizational information, prospect lists and worksets, stewardship details, and PeopleSoft Enterprise Contributor Relations reports. The following table summarizes these menu paths and lists all prospect analysis information pages that PeopleSoft Outreach delivers:

Menu Navigation	Prospect Information Page
Self Service, Outreach, View Person Information, Constituent Information	Person Profile
	Involvement Summary
	Membership History

Menu Navigation	Prospect Information Page
	Audience History
	Event History
	Volunteer History
	Relationship Summary
	Communication Summary
	Comment Summary
	Checklist Summary
Self Service, Outreach, View Person Information, Prospect Information	Strategy Summary
	Clearance Summary
	Personal Assets
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary
	Planned Giving Profile
	Action Summary
	Contact Report Summary
Self Service, Outreach, View Person Information, Giving Information	Giving Profile
	Commitment Summary
	Commitment Register

Menu Navigation	Prospect Information Page
	Transaction Register
	Giving Club Progress
	Open Pledge Register
Self Service, Outreach, View Organization Information, Constituent Information - Org	Organization Profile
	Relationship Summary
	Involvement Summary
	Membership History
	Employee List
	Audience History
	Communication Summary
	Comment Summary
	Checklist Summary
Self Service, Outreach, View Organization Information, Prospect Information - Org	Strategy Summary
	Action Summary
	Contact Report Summary
	Clearance Summary
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary

Menu Navigation	Prospect Information Page
Self Service, Outreach, View Organization Information, Giving Information - Org	Giving Profile
	Commitment Summary
	Commitment Register
	Transaction Register
	Open Pledge Register
	Matching Gifts
	Giving Club Progress
Self Service, Outreach, View Lists	Person Profile
	Campaign Prospects
	Top Donors
	Giving Club Membership
	Involvement Roster
	Profile Compare
Self Service, Outreach, View Reference Information	Campaigns
	Giving Clubs
	Designations
Self Service, Outreach, CR Reports	Bio-Bit Report − Person
	Bio-Bit Report − Organization
	Bio-Bit Report − Workset

Menu Navigation	Prospect Information Page
	Designation Donors
	Campaign Progress
	Role Assignments

CHAPTER 18

Using Student Center

This chapter provides an overview and discusses how to use the self-service Student Center.

Understanding Self-Service Student Center

The Student Center is a self-service page that provides students a single entry point from which to begin navigation to student related transactions. It also presents to students, in one location, the information that is important to them, such as their class schedule, enrollment dates, and account information.

From the Student Center, students access any student related transaction that is available from Campus Self Service. You can use the Student Center Options page and security setup to control which sections and transactions appear on the Student Center.

The nine sections that the Student Center can display are:

- Academics

  Provides links to enrollment and academic records self-service transactions. Also displays the student's schedule, which displays the classes, in any career, in which the student is registered for the current term, as of today's date. If there are no such classes, the system looks at the next term in which the student is term activated for classes to display.

- Finances

  Provides links to PeopleSoft Student Financials self-service transactions and displays account summary information.

- Personal Information

  Provides links to PeopleSoft Campus Community self-service transactions and displays contact information.

- Admissions

  Provides links to PeopleSoft Recruiting and Admissions self-service transactions.

- Holds

  Provides a list of hold items. Students can click the Details link to access the Holds self-service application page for more information.

- To Do List

  Provides a list of to do items. Students can click the Details link to access the To Do List self-service application page for more information.

- Enrollment Dates

  Provides a list of enrollment dates. Students can click the Details link to access the Enrollment Dates self-service application page for more information.

- Advisor

  Provides advisor information. Students can click the Details link to access the View My Advisor self-service application page for more information.

- Related Links

  Displays the links that you defined on the Student Center Options page.

See Also

Chapter 4, “Setting Up Self-Service Student Records,” Setting Up Self-Service Student Center, page 16

Using Self-Service Student Center

Students can use the self-service Student Center.

Page Used to Use Self-Service Student Center

Page Name	Object Name	Navigation	Usage
Student Center	SSS_STUDENT_CENTER	Self Service, Student Center	Students use this page to access student related transactions and to view important information, such as class schedule, dates, and account information.

CHAPTER 19

Using Faculty Center

This chapter provides an overview and discusses how to:

- Use the self-service Faculty Center.
- Enter grades through self service.
- View self-service class rosters.

See Also

Chapter 4, "Setting Up Self-Service Student Records," Setting Up Self-Service Faculty Center, page 20

Understanding the Self-Service Faculty Center

The Faculty Center is a self-service component that provides instructors a single entry point from which to begin navigation to instructor-related transactions. From the Faculty Center, instructors can do the following:

- View their class schedule.
- View their grade rosters, enter grades, and post grades.
- View their class rosters.
- View advisee information.
- Search for classes and browse the catalog.
- Access your Learning Management System.
- Access the Gradebook, if your institution has licensed PeopleSoft Enterprise Gradebook.
- Locate a faculty member.

Using the Self-Service Faculty Center

Instructors can use self-service Faculty Center.

Pages Used to Use the Self-Service Faculty Center

Page Name	Object Name	Navigation	Usage
Faculty Center	INSTR_CLASS3	Self Service, Faculty Center	Instructors use this page to access instructor-related transactions and to view their teaching schedule. Instructor see only those terms for which they are assigned as the instructor.
Class Detail	SSR_CLSRCH_DTL	Click a class within My Teaching Schedule on the Faculty Center page.	Instructors can view the details of the classes in their schedules.
View My Weekly Schedule	SS_WEEKLY_SCHED_IN	Click the View My Weekly Schedule button on the Faculty Center page.	Instructors can view their weekly schedule in a grid format.
Locate a Faculty Member	SSR_FIND_INSTR	Click the faculty search tab on the Faculty Center page.	Instructors can locate the teaching schedule for another instructor. If available, once the instructor's teaching schedule is displayed, click on the instructor's name to send an email.
Advisement	SS_ES_GRADE_LISTA	Self Service, Faculty Center	Advisors can view all of their advisees' class schedules, enrollment appointments, term grades, degree progress reports, transfer credit reports, and unofficial transcripts. See the advisor chapter
Class Search	SSR_CLSRCH_ENTRY	Self Service, Faculty Center	Instructors can search for classes and browse the catalog.
Learning Management System	LMS_TARGET_SELECT	Self Service, Faculty Center	Instructors can access your Learning Management Systems from the Faculty Center either by using the Learning Management Systems tab to get to their LMS home page, or by clicking the Learning Management System icon for a specific class. The icon will take the instructor directly to the course information within the Learning Management System.

Entering Grades through Self-Service

This section provides prerequisites and discusses how instructors enter grades through self-service.

Prerequisites

In order for instructors to access their mid-term and final grade rosters, you must:

- Generate the rosters.
- Assign the instructors to classes.
- Give the assigned instructors appropriate grade roster access of Grade, Approve, or Post.

Pages Used to Enter Grades through Self-Service

Page Name	Object Name	Navigation	Usage
Grade Roster	SS_GRADE_ROSTER	Self Service, Faculty Center Click the Grade Roster icon on the Faculty Center page.	Instructors view or enter grades, update the roster's approval status, and post grades.
Grade Change Request	SS_GRADE_CHANGE	Click the Grade Change Request link on the self-service Grade Roster page.	This link appears after grades are posted. Instructors submit grade change requests.
Send Notification	CS_NOTIF	Click the Notify Selected Students or the Notify All Students links on the Self-Service Grade Roster page.	Instructors send email notifications to select or all students in a class.
Students Without Email Address	SSR_NO_EMAIL	This page appears when you click the Notify All Students link and there are students on the grade roster who do not have email addresses in the system.	Displays the students on the grade roster who do not have email addresses.
Transcript Note	GRADE_ROSTER_NOTE	Click the Note link on the Transcript Notes tab on the self-service Grade Roster page.	Instructors can add a transcript note to a student's transcript. The Note link on the self-service Grade Roster page is only available with a roster type of *Final Grade.*

Entering Mid-Term and Final Grades

Access the Grade Roster page.

The Grade Roster icon appears on the Faculty Center — My Teaching Schedule once grade rosters have been generated for a class and when the instructor has been assigned grade, approve, or post access within the schedule of classes. Instructors with grade, approve, or post access for the class can assign grades to students. Instructors with approve or post access can use the Approval Status field to update the status of the final grade roster before they save it. Choices are *Approved, Not Reviewed,* and *Ready for Review.* A status of *Approved* is required in order to post the roster. Once the status is set to Approved and is saved, the post button becomes available for instructors with Post access. The instructor can then post grades from the self service grade roster. Once a class is posted, the Request Grade Change button becomes available for instructors to change a student's grade.

Click the Printer Friendly Version button to print a copy of the grade roster.

Viewing Self-Service Class Rosters

This section discusses how instructors view class section rosters through self-service.

Pages Used to View Self-Service Class Rosters

Page Name	Object Name	Navigation	Usage
Class Roster	SS_FAC_CLASS_ROST	Self Service, Faculty Center Click the Class Roster icon on the Faculty Center page.	Instructors view the students who are enrolled in a class, have dropped a class, or are on the wait list for a class. Instructors can send email notifications to selected students or all students in the class.

Using Instructor Self-Service Pages and LMS Authentication

When you use PeopleSoft authentication, instructors can use self-service pages to link to their Learning Management System.

An LMS button appears next to LMS classes on the Faculty Center — My Teaching Schedule when a provider for authentication is identified or when an LMS URL is provided on the Schedule of Classes — LMS Data page.

Instructors can also access a list of LMS providers and select the appropriate provider link to transfer directly to their home page in that LMS provider's website.

See Also

Customer Connection, PeopleSoft Student Records, "Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions 8.9"

Pages Used to Access the LMS Website

Page Name	Object Name	Navigation	Usage
Learning Management Systems	LMS_TARGET_SELECT	Self Service, Faculty Center Click the Learning Management System button.	Instructors click the a Learning Management System provider to access the LMS website.

Using the LMS Button to Access the LMS Website

Instructors can access the Faculty Center self-service page and click on the LMS button to transfer to the appropriate external LMS site.

When an LMS provider is identified for authentication and the instructor clicks the LMS button, the system authenticates the user and transfers him or her directly to the academic content for the specified class within the external LMS. With authentication, the instructor does not have to log in to the external site.

If instead of a provider an LMS URL is specified, no authentication takes place. The system transfers the user to the specified URL, such as an instructor's website, where a log in may or may not be required.

If neither an LMS provider nor an LMS URL are assigned to the class, the LMS button does not appear.

Using the Provider Link to Access the LMS Site

Instructors can use the Learning Management Systems self service page and click the LMS provider link to transfer to the appropriate external LMS site. The system performs the authentication and transfers them directly to their home page in that provider's website. Since instructors are not tied to an institution, all providers are displayed where the Display as Provider Link is selected on the LMS Provider setup page.

CHAPTER 20

Using Self-Service Student Admissions

This section discusses how applicants or visitors perform the following self-service tasks

- Request information.
- Accept or decline admission.
- View application status.

Using Self-Service Request Information

Visitors can request information from your institution through Campus Self Service.

Understanding Self-Service Request Information

Campus Self Service enables you to capture prospect data over the internet. When visitors to your website request admissions information, they can enter information about themselves that the system converts to prospect data. For example, they can enter academic interests, test scores, academic program information, and more. The system takes this information and creates a prospect record. To request admissions information, a visitor must have a user ID and password.

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

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

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

See Also

Chapter 7, "Setting Up Recruiting and Admissions Self Service," page 51

Pages Used to Use Self-Service Request Information

Page Name	Object Name	Navigation	Usage
Request Admission Materials	ADM_WEB_PRS_INTRO	• Self Service, Student Admission, Request Information • Self Service, Request Information	Visitors view introductory text about requesting admission materials, such as how to move from page to page and how to prompt for values.
Request Information	ADM_WEB_PRS_CAR	Click the Next button on the Request Admission Materials page.	Visitors add, delete, or edit the academic careers for which they want to request information
Request Information—I am Interested in Attending	ADM_WEB_PRS_CAR_SP	Click the Add button on the Request Information page.	Visitors enter academic career, academic information, school information, and academic program information, depending on your set up in the Web Prospect Setup page.
Academic Interests	ADM_WEB_PRS_INT	Click the Next button on the Request Information page.	Visitors can select their academic interests. This page appears to visitors if you enable this segment on the Web Prospect Setup page.
Test Results	ADM_WEB_PRS_TST	Click the Next button on the Academic Interests page.	Visitors can enter test results. This page appears to visitors if you enable this segment on the Web Prospect Setup page.
Test Results	ADM_WEB_PRS_TST_SP	Click the Add button on the Test Results page.	Visitors add test details, such as test name, scores, percentiles, and dates.
Submit	ADM_WEB_PRS_SUB	Click the Next button on the Test Results page.	Visitors submit the request.
Your request for information has been processed	ADM_WEB_PRS_END	Click the Submit button on the Submit page.	Visitors view a message confirming that their request was successfully submitted.

Using Self-Service Accept or Decline Admission

Applicants can view their application status and accept or decline admission using self-service pages.

You can edit the text messages on both the Accept Admission self-service page and the Decline Admission self-service page. These messages are in the message catalog under the message set number 14200.

If the applicant accepts admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Intention to Matriculate*. The system sets the effective date to the day the student accepts admission.

If the student declines admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Applicant Withdrawal*. The system sets the effective date to the day the student declines admission.

Additionally, any data that is provided about the school that the student is going to attend and why they choose that institution over this one is inserted on the Application Student Response page. Each of the pages above is within the Maintain Applications component.

Pages Used to Use Self-Service Accept Admission

Page Name	Object Name	Navigation	Usage
Accept Admission	SS_ADM_ACCEPT	• Self Service, Student Admission • Self Service, Admissions	This page appears if the applicant has no application to accept or decline.
Accept Admissions–Select Application	SS_ADM_ACCEPT2	• Self Service, Student Admission • Self Service, Admissions	Applicants can select the application that they want to accept or decline. If an applicant was admitted to multiple academic careers or academic programs, each application will appear on this page.
Accept or Decline Admission	SS_ADM_ACC_DEC	Click the Accept/Decline link for the application that you want to process.	Applicants select whether they want to accept or decline admission.
Confirm Acceptance	SS_ADM_ACCEPT3	Click the I Accept Admission button on the Accept or Decline Admission page.	Applicants can confirm their acceptance.
Admittance Accepted!	SS_ADM_ACCEPT4	Click the Confirm Acceptance button on the Confirm Acceptance page.	This page appears to show that the applicant's selection has been processed.
Confirm Decline	SS_ADM_DECLINE1	Click the I Decline Admission button on the Accept or Decline Admission page.	Applicants can confirm that they want to decline admission.
Admission Declined	SS_ADM_DECLINE2	Click the Confirm Decline button on the Conform Decline page.	This page appears to show that the applicant's selection has been processed. Also, applicants can enter a the reason they declined admission and the institution they chose to attend. Applicants can select the institution from the prompt, or they can enter the institution in the free-from field if you selected Free Form Institution on the Installation Defaults - AD page. The information the applicant enters on this page posts to the Application Student Response page in the Application Maintenance component.

Using Self-Service View Application Status

This section discusses how applicants view their application status through Campus Self Service.

Pages Used to Use Self-Service View Application Status

Page Name	Object Name	Navigation	Usage
Application Status	SS_ADM_APP_STATUS	• Self Service, Student Admission • Self Service, Admissions	Applicants can view the status of their applications.

Viewing Application Status

Application status is based on the status of the checklists assigned to this application. If one or all checklists are complete, the status will show *Complete*. If one or all checklists are incomplete, the status will show *Incomplete* and the View outstanding items for this application link appears. Applicants can follow this link to access their to do list. Applicants can follow this link to view their outstanding items that must be received in order for the application to be processed.

CHAPTER 21

Using Self-Service Course Catalog and Schedule

Students, instructors, and community members use the self-service Class Search feature to search the schedule of classes or browse the course catalog for a specific institution and term. Students can access class search from several places within Campus Self Service, and they can select classes directly from class search, even if they do not access class search through enrollment navigation. Instructors can access class search through the Faculty Center in Campus Self Service. They can see classes in their search results that do not appear to students because the Schedule Print check box for those classes has been cleared on the Maintain Schedule of Classes - Basic Data page.

Common Elements

Select Classes

Students accessing class search from self-service navigation can select classes directly from search pages. Select Classes behaves differently based on how class search was accessed. If accessed from the Student Center, from left hand navigation, Class Search, or from the Wish List, Select Classes places classes on the student's Wish List. If class search is accessed from the Add page Select Classes begins the add classes process. If class search is accessed from the Swap page Select Classes begins the swap classes process.

Searching for Classes Using Self-Service Pages

This section provides prerequisites and discusses how to:

- Select institution and term for Class Search.
- Select search criteria and searching for classes.
- Review Class Search results.
- View Class Search details.
- Browse the course catalog.
- Review course catalog details.

Prerequisites

Configure self-service class search on the Class Search Setup page.

See Also

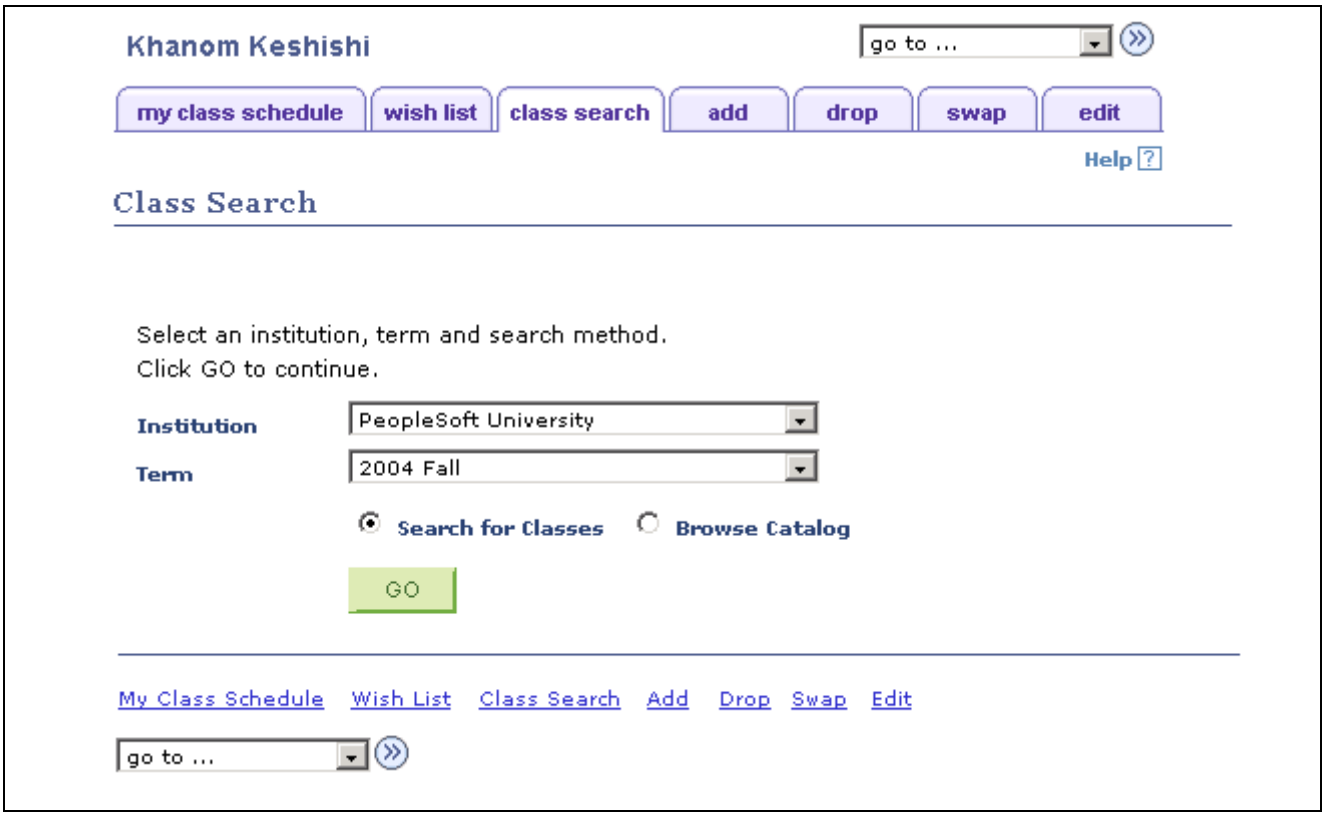
Chapter 4, "Setting Up Self-Service Student Records," Defining Class Search Setup, page 14

Pages Used to Search for Classes Using Self-Service Pages

Page Name	Object Name	Navigation	Usage
Class Search	SSR_CLSRCH_MAIN	• Self Service, Student Center Click the Class Search tab. • Self Service, Enrollment, Class Search/Browse Catalog • Self Service, Enrollment, Wish List • Self Service, Enrollment, Enrollment, Add Classes • Self Service, Enrollment, Enrollment, Swap Classes • Self Service, Class Search/Browse Catalog • Self Service, Faculty Center Click the Class Search tab.	Specify the academic institution and term in which you want to search for classes.
Search for Classes	SSR_CLSRCH_ENTRY	Select Class Search and click Go on the Class Search page.	Search for classes offered during a specific term. Enter search criteria and retrieve your results.
Class Search Results	SSR_CLSRCH_RSLT	Click the Search button on the Search for Classes page.	Review all classes that match your search criteria.
Class Search Detail	SSR_CLSRCH_DTL	Click a class section on the Class Search Results page.	Review detail for a specific class.
Browse Catalog	SSR_CLSRCH_CRSECAT	Select Browse Catalog and click Go on the Class Search page.	Browse the course catalog to find course details and class sections.
Catalog Detail	SSR_CLSRCH_CATDETL	Click a course on the Browse Catalog page.	View course details and access class sections.

Selecting Institution and Term for Class Search

Access the Class Search page.



Class Search page

Institution When accessed by a student through self-service navigation, the institution appears as default from the student's row in the STD_CAR_TERM table.

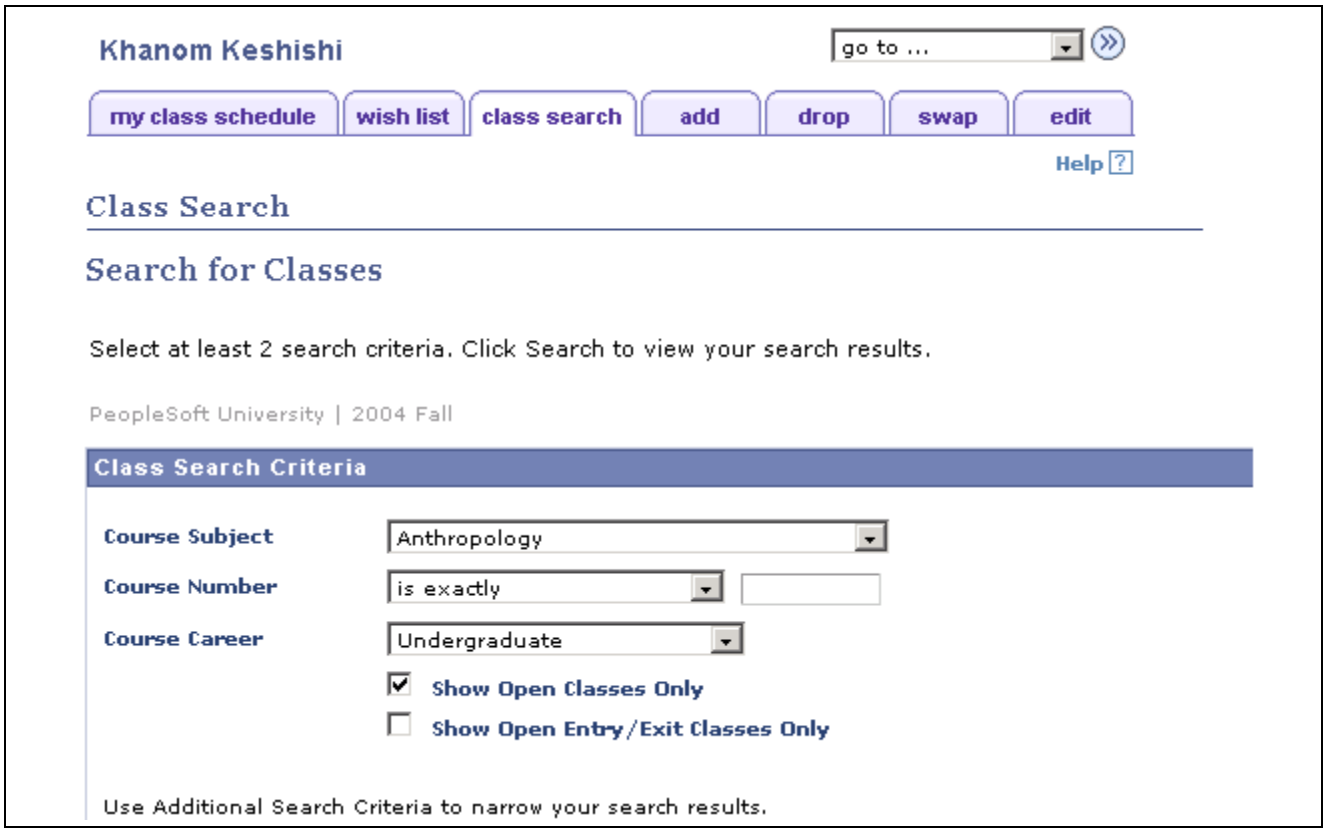
Term When accessed by a student directly from class search, the most current term appears. When accessed from Wish List, Add Classes, or Swap a Class, the term selected in the enrollment page is displayed in the Class Search.

Search for Classes Select this option and click Go to search the schedule of classes for the selected institution and term.

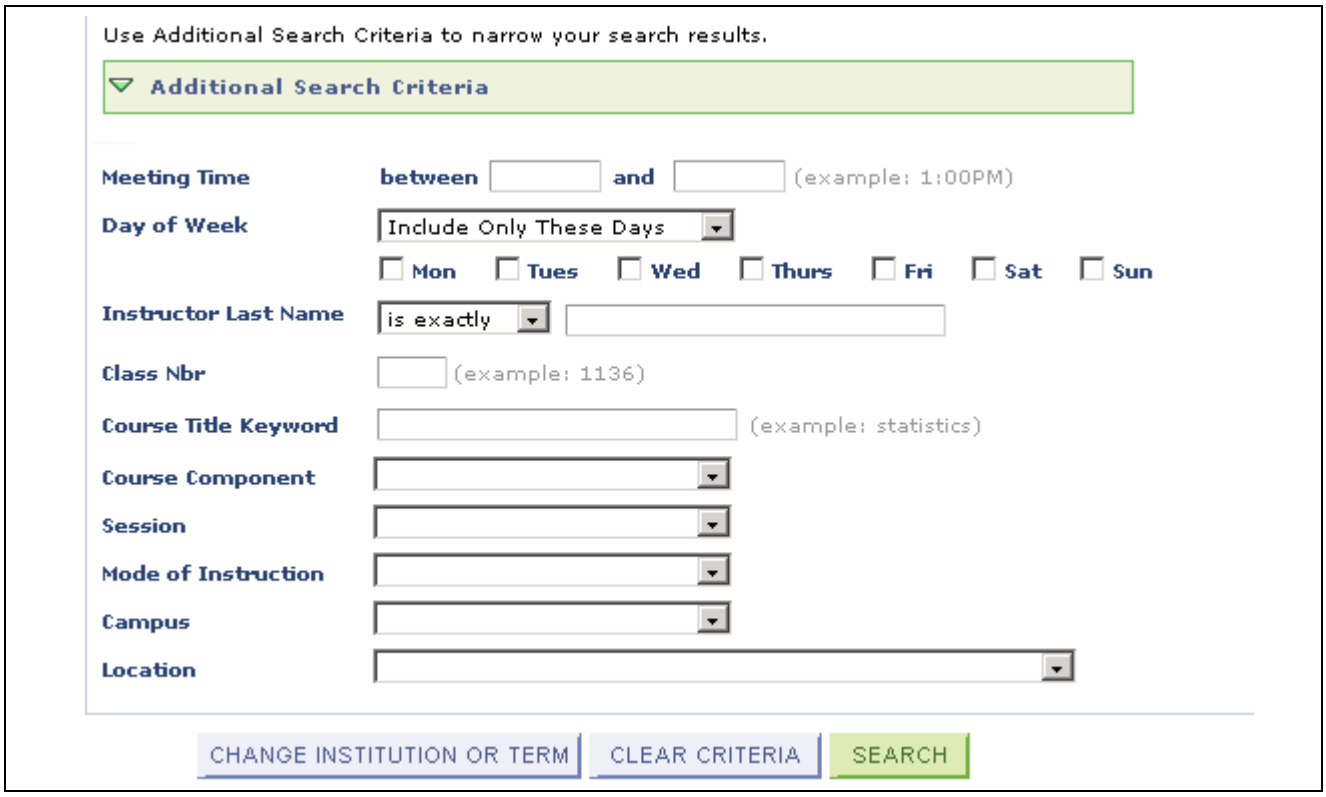
Browse Catalog Select this option and click Go to browse the course catalog for the selected institution and term.

Selecting Search Criteria and Searching for Classes

Access the Search for Classes page.



Search for Classes page (1 of 2)



Search for Classes page (2 of 2)

Course Career If accessed by a student directly from class search or Add, the student's academic career appears by default. If accessed by a student from Wish List or Swap, the academic career selected in the Wish List or Swap appears.

Meeting Time To narrow search results by meeting time, enter a range of class start and end times. For example, if you enter 1:00 PM in the Between field and 3:00 PM in the And field, the system would only retrieve classes that begins at or after 1:00 PM and ends at or before 3:00 PM. If you just entered 1:00 PM in the Between field and left the And field blank, the system would retrieve all classes that meet on or after 1:00 PM.

Day of Week To narrow search results by day of week, select one of the following:

Include Only These Days:. Finds classes that meet on the selected days. For example, if you select Monday and Thursday, the system will retrieve all classes that meet on Mondays and Thursdays only or Mondays, Thursdays, and other days.

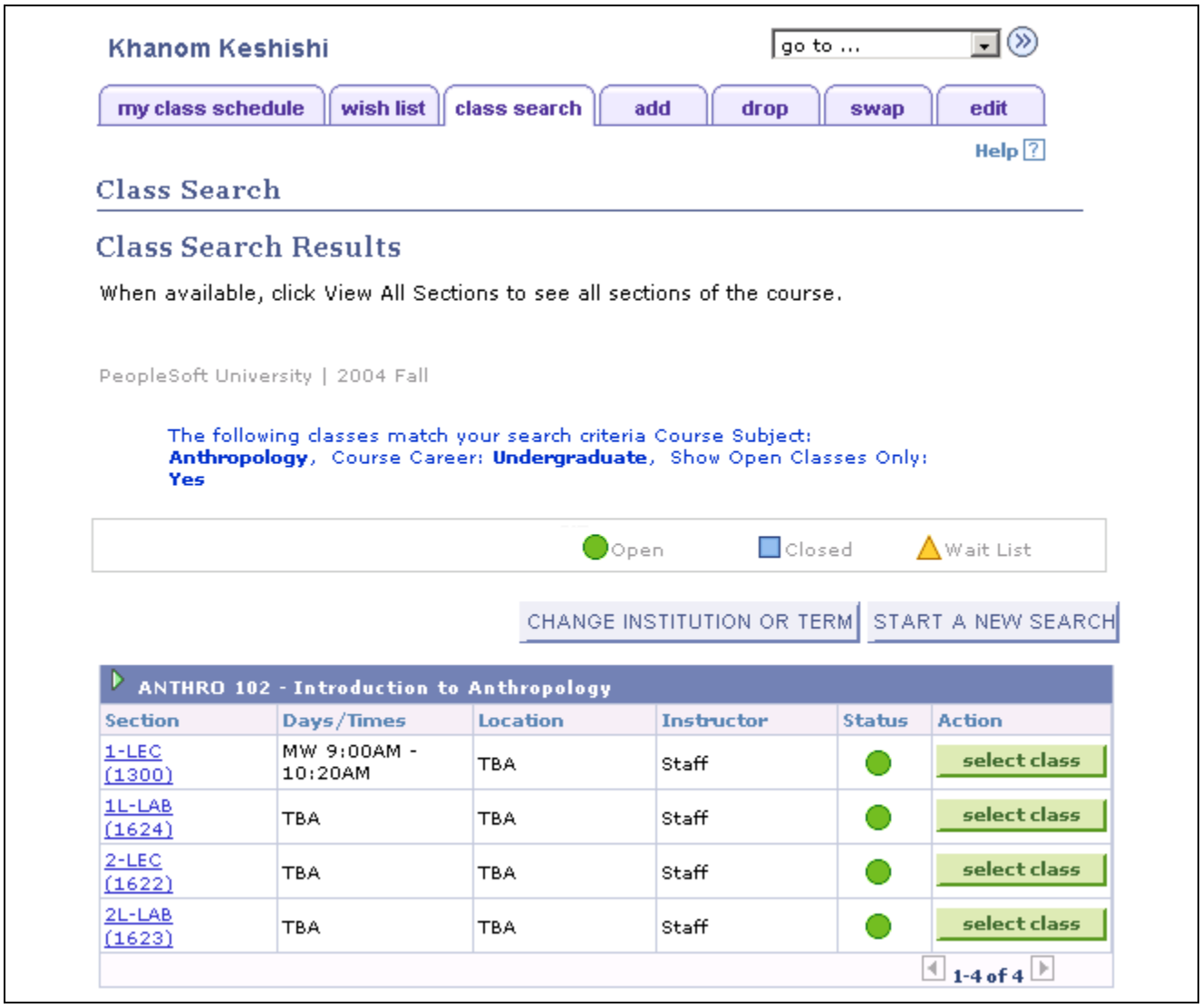
Include Any of These Days:. Finds classes that meet on at least one of the selected days. So if you select Monday and Thursday, the system will retrieve all classes that meet On Monday only, Thursday only, or Mondays or Thursdays and other days.

Exclude Any of These Days:. Finds classes that do not meet on either of the selected days.

Exclude Only These Days:. Finds classes that do not meet on both of the selected days.

Reviewing Class Search Results

Access the Class Search Results page.



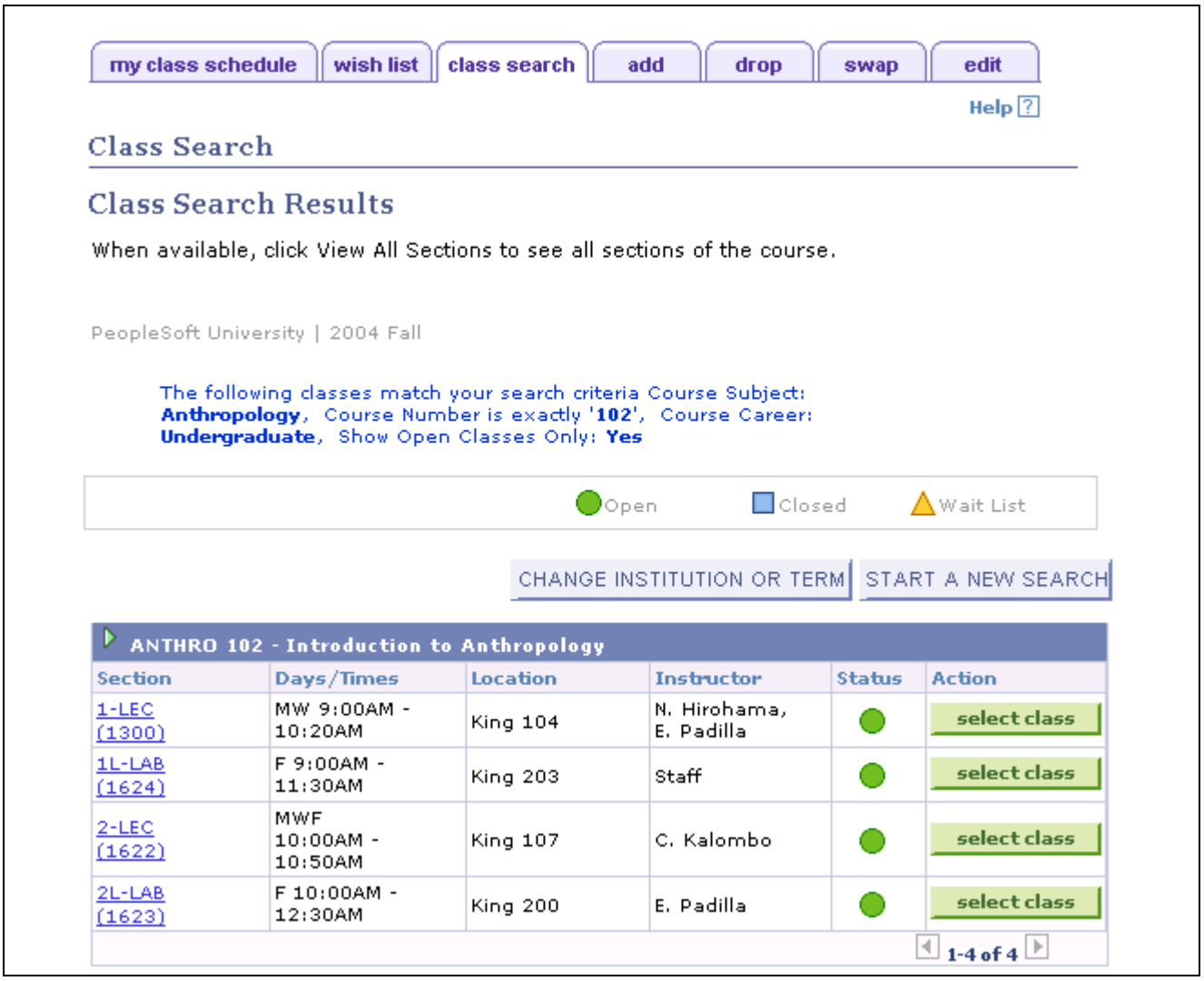
Class Search Results page

Wait List This icon only appears in the legend if you clear the Use Wait Listing check box on the Student Records Setup page. Likewise, if you clear the Use Wait Listing check box, the search results will either have a status of open or closed for classes.

Schedule Print When accessed by an instructor, the Schedule Print check box indicates whether a class section appears in the student and visitor class search or on the printed class schedule. You indicate whether a class section prints on the class schedule on the Maintain Schedule of Classes - Basic Data page.

Viewing Class Search Details

Access the Class Search Detail page.



Class Search Detail page

The Class Search Detail page displays all information from the course catalog, plus class schedule information. However, you can control what information appears on this page for students and faculty who access the page through self-service navigation. Use the Class Search Setup page to determine which information appears on this page to students and faculty.

Browsing the Course Catalog

Access the Browse Catalog page.



Browse Catalog page

Students and instructors can browse the course catalog by academic subject. They can also click the View Class Sections link to go to Class Search Results page for the indicated course and term.

Reviewing Course Catalog Details

Access the Catalog Detail page.



Catalog Detail page

Students and instructors can click the View Class Sections link to go to the Class Search Results page.

CHAPTER 22

Using Community Directory Search

This chapter provides an overview of the Community Directory Search application in PeopleSoft Campus Self Service, and discusses how to:

- Set up community directory.
- View the directories.

Understanding Self-Service Community Directory Search

The Community Directory Search self-service functionality enables you to provide searchable directories of members of your campus community online over the internet. Instead of exposing an entire list of people at your institution and having users load and search through it, you can make student, employee, or alumni directories available so users can search from smaller online lists and quickly locate individuals at your institution.

To set up PeopleSoft Community Directory Search, run the Community Directory Load process to generate a student, employee, or alumni directory. Specify the appropriate mass change definition for the directory to generate, and specify the type of data to include in that directory.

If a student places FERPA privacy restriction on a specific type of data for him or herself, the system will not expose that data in the online directory. Or, if the individual placed the restriction but chose to release it for inclusion in a specific publication, for example, the Student Directory, then even though the data is not releasable elsewhere, the system displays it in the specified directory as indicated.

Generating Community Directories

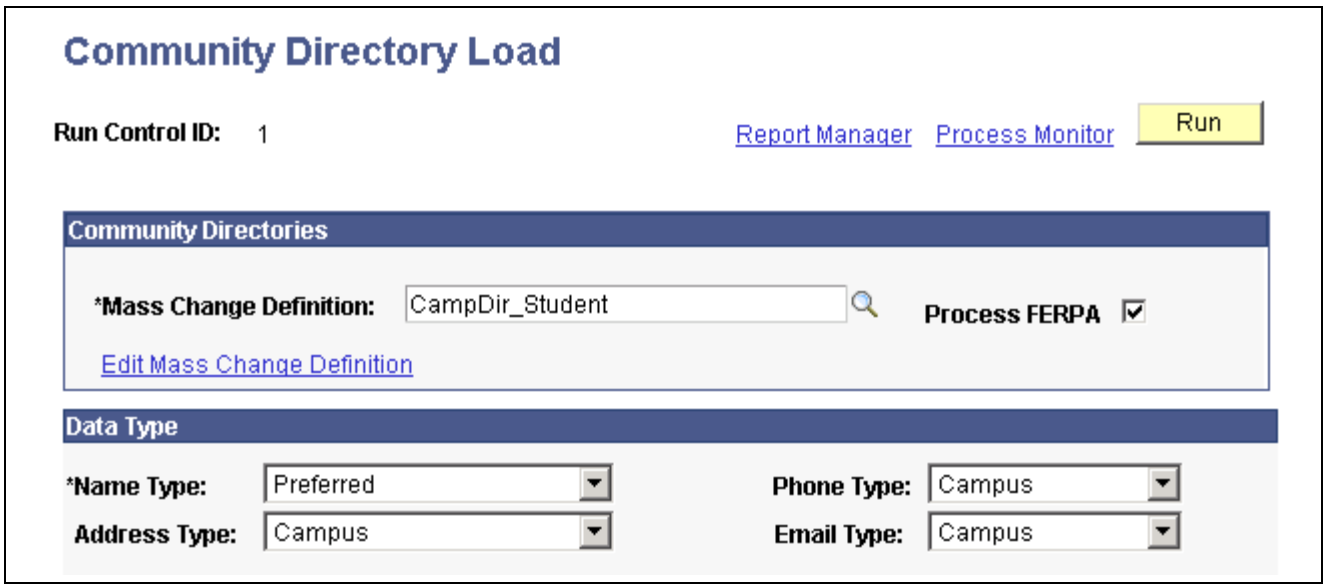
This section discusses how to generate online directories.

Page Used to Generate Community Directories

Page Name	Object Name	Navigation	Usage
Community Directory Load	CAMPDIR_RUNCNTL	Set Up SACR, Product Related, Community Access/Directory, Community Directory Load	Generate online directories.

Generating Online Directories

Access the Community Directory Load page.



Community Directory Load page

Community Directories

Mass Change Definition Specify the mass change definition for the directory to generate. The following mass changes are delivered with your system:

CampDir_Alumni: Generates the Alumni Directory.

CampDir_Staff: Generates the Employee Directory

CampDir_Student: Generates the Student Directory

Process FERPA Select to apply the FERPA restrictions and release to publications options selected on the FERPA page, FERPA Quick Entry page, or the self-service Privacy Settings page in PeopleSoft Campus Self Service.

Edit Mass Change Definition Click to access the Mass Change Definition search page where you can select the mass change definition to edit or to regenerate.

Data Type

Select one or any combination of data types to include in the directory.

Name Type Select the type of name to include for individuals in this directory.

Address Type Select the type of address to include for individuals in this directory.

Phone Type Select the type of phone data to include for individuals in this directory.

Email Type Select the type of email address to include for individuals in this directory.

To keep your community directories up to date, run the process at least once a day. Always regenerate the mass changes prior to running the process.

Searching Community Directories

This section discusses how to:

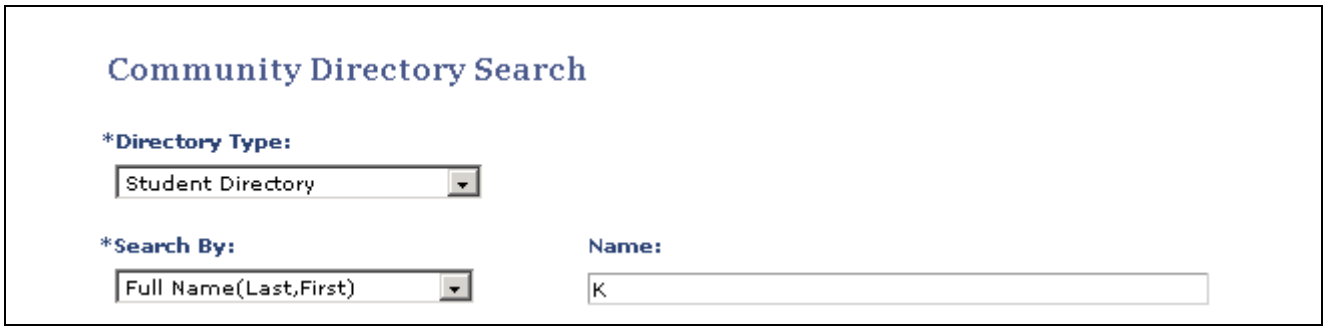
- Specify the community directory to search.
- Search the community directory.

Pages Used to Search the Directories

Page Name	Object Name	Navigation	Usage
Community Directory Search	SRCH_CD_TYPE	Self Service, Community Directory Search	Specify the community directory and criteria to search.
Community Directory for Students	SRCH_STDNT_CRIT	On the Community Directory page, select *Student Directory* and enter criteria for which to search.	View the search results obtained from the Student Directory and enter fields to perform a new search.
Community Directory for Employees	SRCH_STAFF_CRIT	On the Community Directory page, select *Employee Directory* and enter criteria for which to search.	View the search results obtained from the Employee Directory and enter fields to perform a new search.
Community Directory for Alumni	SRCH_ALUMN_CRIT	On the Community Directory page, select *Alumni Directory* and enter criteria for which to search.	View the search results obtained from the Alumni Directory and enter fields to perform a new search.
Student Profile	STDNT_PROF_SEC	Click the student's name on the Community Directory for Students page.	View data in the directory profile for that person.
Employee Profile	STAFF_PROF_SEC	Click the employee's name on the Community Directory for Employees page.	View data in the directory profile for that person.
Alumni Profile	ALUMN_PROF_SEC	Click the alumnus name on the Community Directory for Alumni page.	View data in the directory profile for that person.

Specifying the Directory to Search

Access the Community Directory Search page.



Community Directory Search page

Directory Type Select the directory type *(Alumni Directory, Staff Directory,* or *Student Directory)* to search.

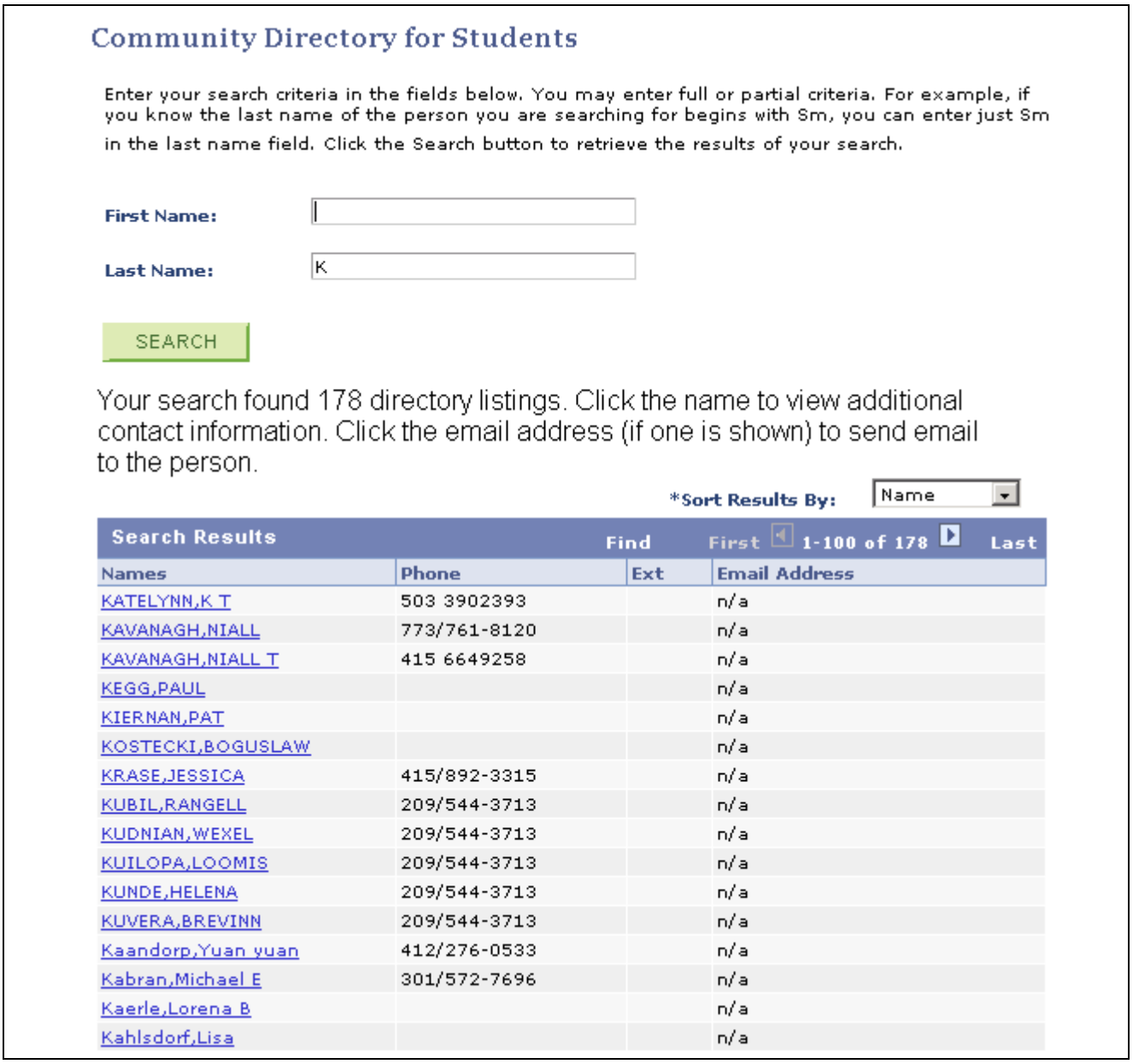
Search By Specify the criteria *(First Name, Full Name (Last,First),* or *Last Name)* by which to search.

Specify one or more characters to use. For example, if you select *First Name* and enter only *S,* the system searches through the specified directory for all first names that begin with "S."

Search Click to access the specified directory.

Searching a Community Directory

Access the Community Directory for Students, Community Directory for Employees, or Community Directory for Alumni page.



Community Directory for Students

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name: K

SEARCH

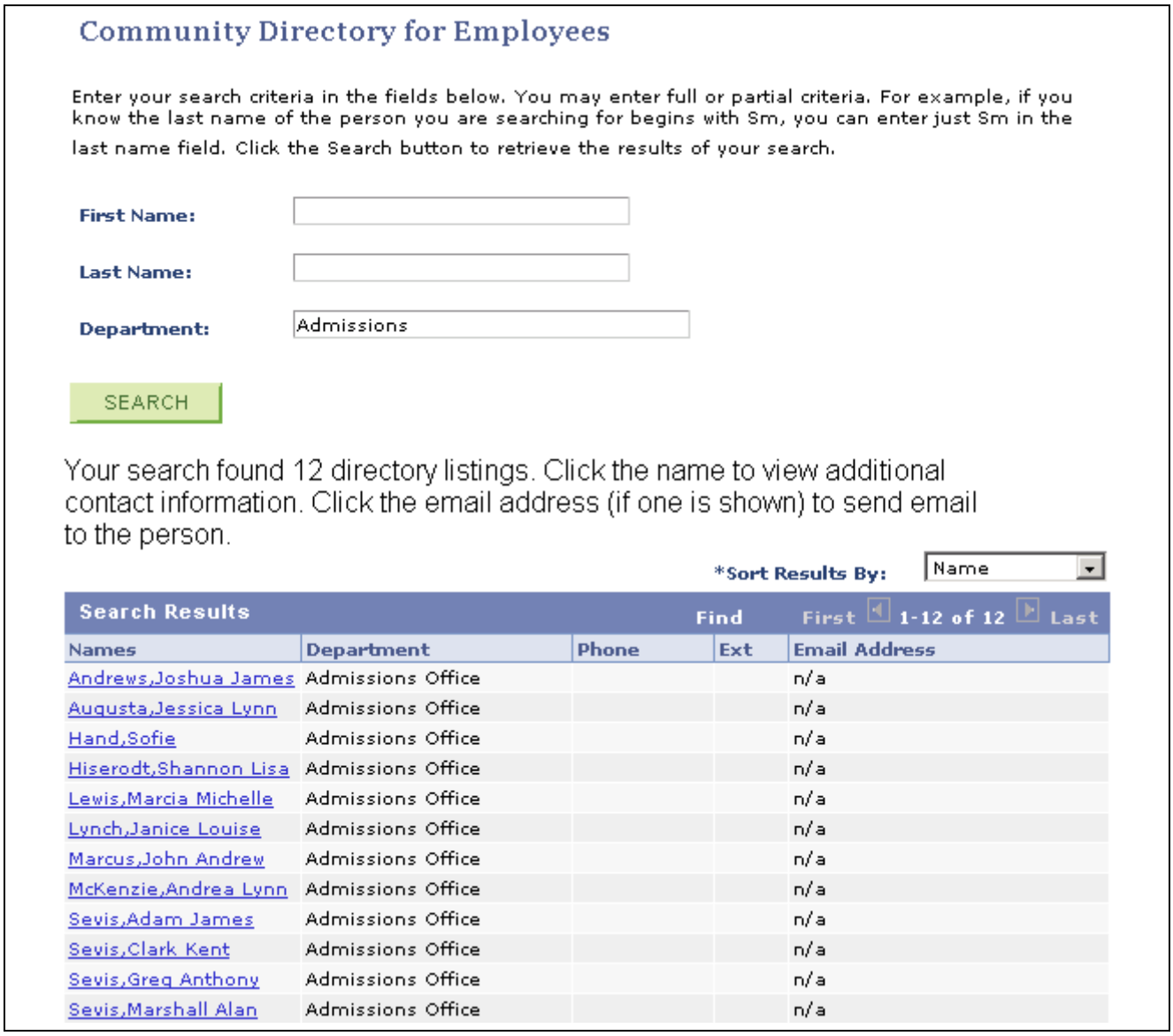
Your search found 178 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

***Sort Results By:** Name

Search Results Find First 1-100 of 178 Last

Names	Phone	Ext	Email Address
KATELYNN,K T	503 3902393		n/a
KAVANAGH,NIALL	773/761-8120		n/a
KAVANAGH,NIALL T	415 6649258		n/a
KEGG,PAUL			n/a
KIERNAN,PAT			n/a
KOSTECKI,BOGUSLAW			n/a
KRASE,JESSICA	415/892-3315		n/a
KUBIL,RANGELL	209/544-3713		n/a
KUDNIAN,WEXEL	209/544-3713		n/a
KUILOPA,LOOMIS	209/544-3713		n/a
KUNDE,HELENA	209/544-3713		n/a
KUVERA,BREVINN	209/544-3713		n/a
Kaandorp,Yuan yuan	412/276-0533		n/a
Kabran,Michael E	301/572-7696		n/a
Kaerle,Lorena B			n/a
Kahlsdorf,Lisa			n/a

Community Directory for Students page



Community Directory for Employees

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

First Name:

Last Name:

Department: Admissions

SEARCH

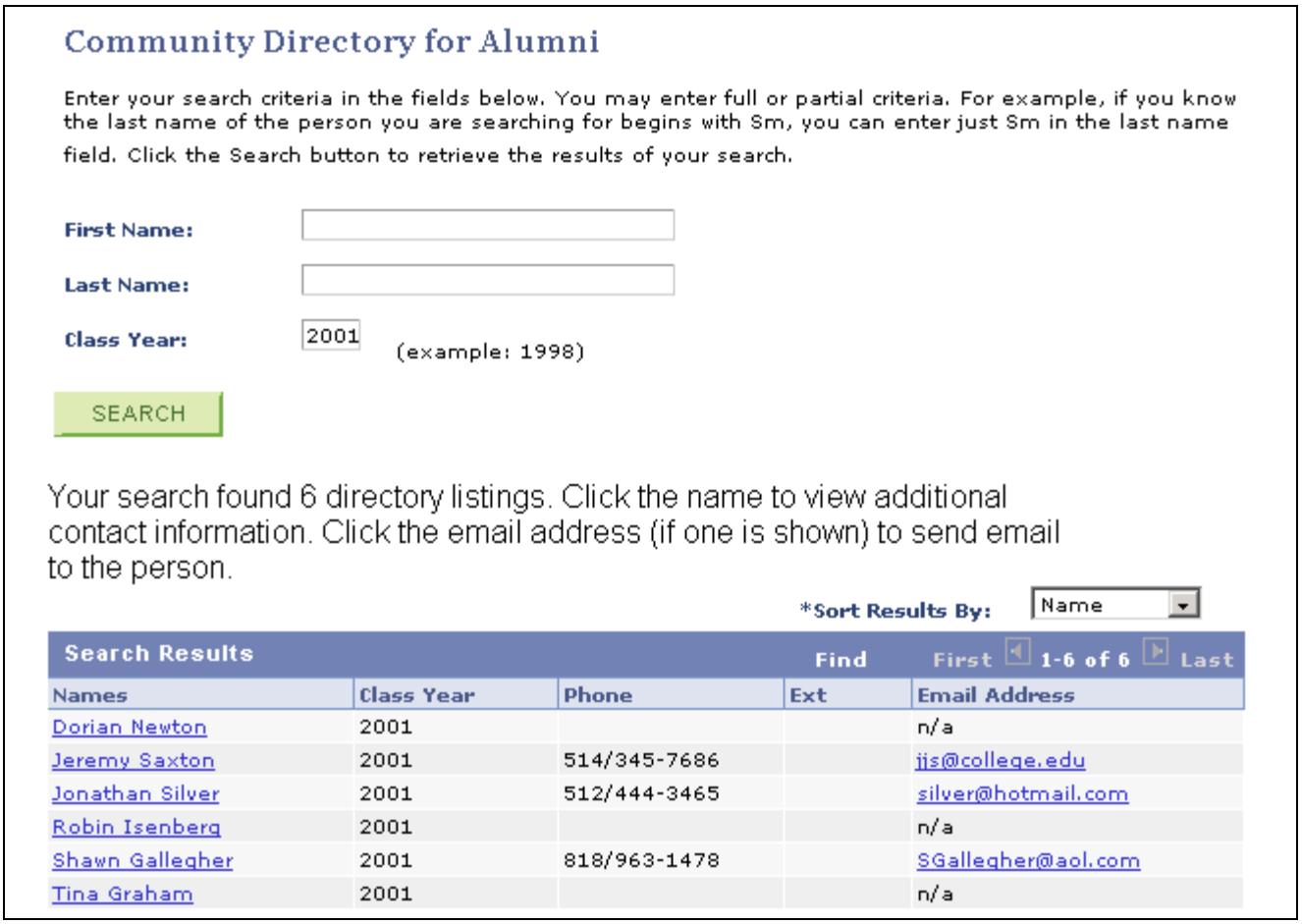
Your search found 12 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

***Sort Results By:** Name

Search Results Find First 1-12 of 12 Last

Names	Department	Phone	Ext	Email Address
Andrews,Joshua James	Admissions Office			n/a
Augusta,Jessica Lynn	Admissions Office			n/a
Hand,Sofie	Admissions Office			n/a
Hiserodt,Shannon Lisa	Admissions Office			n/a
Lewis,Marcia Michelle	Admissions Office			n/a
Lynch,Janice Louise	Admissions Office			n/a
Marcus,John Andrew	Admissions Office			n/a
McKenzie,Andrea Lynn	Admissions Office			n/a
Sevis,Adam James	Admissions Office			n/a
Sevis,Clark Kent	Admissions Office			n/a
Sevis,Greg Anthony	Admissions Office			n/a
Sevis,Marshall Alan	Admissions Office			n/a

Community Directory for Employees page



Community Directory for Alumni page

Search Results

Names Click the individual's name to access the directory profile page for that person where you can view or edit profile data.

Email Address Click the individual's email address to send an email to that address.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group

A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag

Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag

Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data

In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object

In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction

In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

academic advisement reports 155
Academic Calendar Deadlines page 59
Academic Information page 153
Academic Interests page 188
accept admission 189
Accept Admission page 190
Accept Admissions–Select Application page 190
Accept or Decline Admission page 190
Account Activity page 66, 69
Account Summary page 66, 67
accounts
  reviewing, self service 80
action plans, Outreach 160
Add a New Name page 132
Add Address page 132
Add Classes - Confirm Classes page 60
Add Classes - Select Classes to Add - Enrollment Preferences page 60
Add Classes - View Results page 60
Add Classes page 60
additional documentation xviii
addresses 131
Addresses page 132
ADM_WEB_PRS_SETUP component 51
Admission Declined page 190
admission, accept or decline 189
Admissions and Recruiting self service 187
  accept or decline admission 189
  application status 191
  class search 193
  course catalog and schedule 193
  pages used for 188, 190, 191, 194
  request information 187
Admittance Accepted! page 190
Advisee Grade Inquiry page 154
<Advisee's name> Class Schedule page 153
advisees 153
Advisement Committee Members page 153
Advisement page 182
Advisement self service 153
advisors 141
Alumni Profile page 203
Applicants by Category - Application Status page 152
Applicants by Category - Program Detail page 152
Applicants by Category - Search Results page 152
Applicants by Category - Select Search Criteria page 152
Applicants by Organization – Search Results page 152
Applicants by Organization - Select Search Criteria page 152
Applicants by Region - Search Results page 152
Applicants by Region - Select Search Criteria page 152
application fundamentals xvii
Application Status page 191
application status, viewing 191
Apply for Graduation - Confirmation page 144
Apply for Graduation - Select Graduation Term page 144
Apply for Graduation - Submit Application page 144
Apply for Graduation page 144
athletic participation 135
authorization, credit card 30
awarding options 40
Awarding Options page 41
awards
  accepting, declining, and reducing 91

B

base currency 30
biographical information 131, 134, 135, 137
birth information 131
Browse Catalog page 194, 199
business processes 1
business unit labels 36

C

Campus Community self service
community directories (students, employees, alumni) 201
community directory search 203
overview 1
pages used for 7, 201, 203
personal information 7
type control 7
type control setup 7
Campus Personal Information self service 129
addresses, names, phones, and demographic data 131
biographical data, other 137
checklists 138
holds 137
identification data 135
pages used for 130, 132, 134, 135, 137, 138
participation data 135
personal attributes 134
service indicators 137
to do lists 138
understanding 129
user preferences 130
careers, setting up parameters 53
Catalog Detail page 194
Catalog Details page 200
Change Name page 132
Change Primary Contact page 133
Charges Due page 66, 70
checklists 20, 138
Class Detail page 182
Class Roster page 184
class rosters 184
class schedule 58
Class Search Detail page 194, 198
Class Search page 182, 194
Class Search Results page 194, 197
Class Search Setup page 12, 14
classes
adding 59
creating wish list 59
dropping 60
editing 61
swapping 60
viewing schedule of 58
comments, submitting xxii
common elements xxiii
Community Directories
generating 201
Community Directories (students, employees, alumni) 201
alumni 207
employees 206
pages used for 201, 203
searching 203
students 205
understanding 201
Community Directory for Alumni page 203
Community Directory for Employees page 203
Community Directory for Students page 203, 204
Community Directory Load page 201, 202
Community Directory Search page 203
Confirm Acceptance page 190
Confirm Decline page 190
contact information xxii
contact reports, Outreach 171
Contributor Relations self service
action plans 160
ask information 169
assigned actions 161
biographic information 173
business processes 158
contact report 171
fundraising 157
My Prospects process (AV_WS_MYPROS) 158
My Prospects workset 158
Outreach 157
overview 3
pages used for 158, 161, 162, 166
prospect actions 166, 168
prospect actions, assigning resources 169
prospect actions, editing or adding 168
prospect actions, editing or adding descriptions 169
prospect actions, linking to initiatives 170
prospect actions, viewing 170
prospect information 173
prospect selection 168
prospect strategy 164

prospect strategy, linking with initiatives. 165
prospects 162
prospects, selecting 162
reminders 161
convenience fee 34
course catalog and schedule 193
class search 193
common elements 193
pages used for 194
Course List What-If Analysis page 143, 154
Course List What-If Analysis Report page 156
credit card processing
making self service payments 79
posting 30
selecting item types 34
selecting merchant IDs 29
cross-references xxi
currency, base 30
Current Addresses page 153
Current Coursework page 147
Current Phone Numbers page 154
Customer Connection website xviii

D

daily limits 30
decedent data 134
decline admission 189
degree audit 155
degree progress 143
Degree Progress Report - Course List What-If Analysis page 156
Degree Progress Report - Quick What-If Analysis Report page 156
Degree Progress Report page 143, 153, 156
degrees 145
Delete Address page 132
Demographic Information page 133
Detail by Charge page 66, 73
Details by Charge page 72
Details by Due Date page 71
documentation
printed xviii
related xviii
updates xviii
driver's license data 135
Drop Classes - Confirm Your Selection page 60
Drop Classes - View Results page 60
Drop Classes page 60

E

eCheck processing
making self service payments 79
selecting item types 34
selecting merchant IDs 29
Edit Address page 132, 140, 142
Edit Class Enrollment Options - Confirm your Selections page 61
Edit Class Enrollment Options - View Results page 61
Edit FERPA/Directory Restrictions page 134
Edit page 61
Education Data page 148
email addresses 131
Email Addresses page 133
Emergency Contact Detail page 133
emergency contacts 131
Emergency Contacts List page 154
Emergency Contacts page 133
Employment Details page 137
Enrollment Appointment page 154
enrollment appointments 58
Enrollment Dates page 58
enrollment verification 141
ePayment 36
ePayment processing 24
See Also credit card processing; eCheck processing
creating institution sets 24
creating self service payment profiles 77
entering payment information 82
selecting payment methods 81
ethnicity 134
Evaluate My Transfer Credit page 146
exam schedule 62
Exam Schedule - View Details page 62
excess payments
allowing 29
defining self service parameters 35
extracurricular activities 135
Extracurricular Activities page 136

F

FA Item Type 3 page 45
faculty center
pages used for 182
faculty Center 181
Faculty Center component (SSS_FACCNTR_OPT) 20
Faculty Center Options page 21
Faculty Center page 182
Financial Aid – Award Detail page 92, 99
Financial Aid – Award Package page 92, 93
Financial Aid – Award Summary page 111, 113
Financial Aid – Estimated Financial Aid Budget page 125
Financial Aid – Expected Family Contribution page 126
Financial Aid – Financial Aid Eligibility page 121, 124
Financial Aid – Request Counselor Action page 100
Financial Aid – Select Aid Year to View page 92
Financial Aid - Award Summary page 121, 122
Financial Aid - Canceled Awards page 112, 122
Financial Aid - Declined Awards page 112, 118, 122, 127
Financial Aid - Estimated Financial Aid Budget page 111, 121
Financial Aid - Expected Family Contribution page 111, 116, 121
Financial Aid - Financial Aid Eligibility page 111, 114
Financial Aid - Loan Application Information page 112, 121
Financial Aid - Scheduled Disbursements page 112, 119, 122
Financial Aid - Select Aid Year to View page 111, 112, 121
Financial Aid - Select Career to View page 111, 117, 121, 126
Financial Aid - Status Information page 127
Financial Aid Estimated Financial Aid Budget page 115
Financial Aid Item Types component (FINANCIAL_AID_ITEM) 44
Financial Aid Item Types component interface (FINANCIAL_AID_ITEM_CI) 44
Financial Aid Loan Application Information page 118
Financial Aid self service 124
action options in packaging 44
activity by status 110
administrative inquiries 103
administrative requests 100, 109
aid year 92, 112
aid year, viewing pages by 110
award activity detail 106
award detail 99
award period 122
award period, viewing by 122
award period, viewing pages by 120
award processing 91, 93
award summary 113
awarding options 40
awards, declined 118, 127
batch detail 107
batch error 108
batch processing 102
batch summary 107
budget 125
career 117, 126
disbursements, scheduled 119, 127
eligibility 114
estimated budget 115
expected family contribution 116, 126
inquiry and award access in packaging 46
inquiry options 37
loan application 118, 126
loan applications 126
loan status 127
loan status modification 47
needs review or rejected status, removing 106
needs review or rejected, viewing 108
overview 3
pages used for 37, 41, 45, 48, 92, 100, 102, 104, 111, 121
processing awards 102
request counselor action 100
scheduled disbursements 127
setting up 37

setup components 37, 40, 44, 47
understanding 37, 91
user-defined text 49
using 91
Financial Aid Status page 45, 46
FINANCIAL_AID_ITEM component 44
FINANCIAL_AID_ITEM_CI component interface 44
fundraising 157
Future Addresses page 132

G

gender 131
getting started 1
glossary 209
Grade Change Request page 183
Grade Roster page 183
grades 139, 183
grades roster 183
graduation 143
graduation, applying for 143

H

Hold Item page 138
holds 20, 137
honors and awards 135
Honors and Awards page 136

I

identification data 135
implementation 4
Inquiry Options page 37, 38
Institution Set 2 page 24, 32
Institution Set page 24
institution sets
defining basic parameters 24
defining self service ePayment use 32
setting up 24
institutions, setting up parameters 53
internet addresses 131
Internet Addresses page 133

L

Language Detail page 134
languages 134
Languages page 134
learning management services (LMS)
authentication 62
accessing 62, 63
learning management system (LMS) 184
Learning Management System page 182
License and Certificates page 135
License/Certificate Detail page 136
List FERPA/Directory Restrictions page 134
Locate a Faculty Member page 182

M

Make a Payment — Confirm Payment page 81, 87
Make a Payment — Payment Result page 81, 88
Make a Payment — Select Payment Method page 81
Make a Payment — Specify Payment Amount page 81, 84
Make a Payment — Specify Payment Details page 81, 82
marital status 131
Membership Detail page 136
memberships 135
Memberships page 136
MMA Partners xviii
Modeling Transfer Credit - View Degree Progress Report page 149
My Action Plan page 161
My Advisors page 141
My Class Schedule page 59, 62
My Learning Management Systems 62
My Prospects process (AV_WS_MYPROS) 158
My Prospects workset 158
adding resources 159
My Reminders page 161

N

names 131
Names page 132
New/Drop-In Advisees page 155
notes xxi

O

Organization Primary Location page 152
Outreach 151, 157
action plans 160
ask information 169
assigned actions 161
biographic information 173

business processes 158
contact report 171
fundraising 157
My Prospects process (AV_WS_MYPROS) 158
My Prospects workset 158
pages used for 158, 161, 162
prospect actions 166
prospect actions, assigning resources 169
prospect actions, completing 170
prospect actions, editing or adding 168
prospect actions, editing or adding descriptions 169
prospect actions, editing or adding details 168
prospect actions, linking to initiatives 170
prospect actions, selecting one to complete 170
prospect actions, viewing 170
prospect information 173
prospect selection 168
prospect strategy 164
prospect strategy, linking with actions 165
prospect strategy, linking with initiatives 165
prospect strategy, viewing 166
prospects 162
prospects, selecting 162
reminders 161
Outreach Workset Initialization /Maintenance page 158
overview 1, 5

P

participation data 135
Payment History — Charges Paid by this Payment page 75
Payment History - Charges Paid by this Payment page 67
Payment History page 67, 74
payment messages 36
Payment Profile — Edit Payment Profile page 78
Payment Profile — Payment Profile Summary page 78
Payment Profile – Profile Detail page 78
payment profiles 77
payments
self service 25, 34
Pending Financial Aid page 67, 76
pending payments 32
PeopleBooks
ordering xviii
PeopleCode, typographical conventions xx
PeopleSoft application fundamentals xvii
personal attributes 134
Personal Identification Number page 135
personal identification numbers (PINs) 135
phone numbers 131
Phone Numbers page 133
photos 135
posting
credit card processing 30
prerequisites xvii
printed documentation xviii
Process A Degree Progress Report page 149
Prospect Action – Action Description page 167
Prospect Action – Action Detail page 167, 168
Prospect Action – Action Summary page 170
Prospect Action – Ask Information page 167, 169
Prospect Action – Assign Others to Action page 169
Prospect Action – Assigned Resources page 167
Prospect Action – Edit Action page 167, 168
Prospect Action – Link Initiatives to Action page 170
Prospect Action – Linked Initiatives page 167
Prospect Action – Results – Edit Action page 167, 170
Prospect Action – Results page 167, 170
Prospect Action – Select a Prospect page 166
Prospect Action – Summary page 167
Prospect Action page 169
Prospect Action Results – Select a Prospect page 167

Prospect Contact Report – Contact Report Summary page 172
Prospect Contact Report – Detail page 168
Prospect Contact Report – Select a Prospect page 168
Prospect Contact Report – Summary page 168
Prospect Contact Report page 171
Prospect Programs page 151
Prospect Strategy – Edit Strategy page 162, 164
Prospect Strategy – Link Strategy Summary page 166
Prospect Strategy – Link Strategy to Initiatives page 165
Prospect Strategy – Linked Actions page 162, 165
Prospect Strategy – Linked Initiatives page 162
Prospect Strategy – Select a Prospect page 162
Prospect Strategy – Strategy Detail page 162, 164
Prospect Strategy – Summary page 162
Prospect Strategy page 162
prospects 166
  enabling prospect career fields 52
Prospects by Category - Search Results page 151
Prospects by Category - Select Search Criteria page 151
Prospects by Organization - Search Results page 151
Prospects by Organization - Select Search Criteria page 151
Prospects by Region – Select Search Criteria page 152
Prospects by Region - Search Results page 152
prospects, Outreach 162, 173
Publication Detail page 137
Publications page 136

Q

Quick What-If Analysis Report page 143, 154

R

Recruiting and Admissions
  pages used for 52
  prospect careers 52
Recruiting and Admissions self service 151
  advisee information 153
  degree audit 155
  institution and career parameters 53
  overview 2
  pages used for 151, 153, 156
  reports 155
  request admissions information 51
  request for information setup 51
  setting up 51
  setup components 51
Related Class Sections page 60
related documentation xviii
Release To Publication page 134
religious preferences 134
Report Results page 141, 156
Request Admission Materials page 188
Request Counselor Action page 104, 109
Request Enrollment Verification page 142
request for information 51
  setting up 51
request information 187
Request Information page 188
Request Information—I am Interested in Attending page 188
Request Official Transcript page 140

S

Search for Classes page 194, 195
Select a class to edit - Enrollment Preferences page 61
Select a class to swap - Enrollment Preferences page 61
self service
  accepting payments 25, 34
  defining institution sets 32
Self Service Activity by Status page 104, 110
Self Service Activity page 104
Self Service Awarding Activity Detail page 104, 106
Self Service Awarding Batch Activity Detail page 104, 108

Self Service Awarding Batch Detail page 104, 107
Self Service Awarding Batch Error page 104, 108
Self Service Batch Process page 102
Self Service Batch Summary page 104, 107
Self Service Loan Status component (SS_FA_LOAN_STAT) 47
Self Service Loan Status page 47, 48
Self Service Options component (SS_FA_INSTALL) 37, 40
Self Service Security page 45
Self-service Security page 47
Send BioDemo Update page 168, 173
Send Contact Report page 168, 172
Send Notification page 154, 183
service indicators 20, 137
  self service 36
SETUP_TIME_PERIODS component 11
SF Self Service Options page 36
SS_FA_INSTALL component 37, 40
SS_FA_LOAN_STAT component 47
SSR_SS_ENRL_OPT component 11
SSS_FACCNTR_OPT component 20
SSS_STDNCTR_OPT component 16
Staff Profile page 203
Student Advisee Roster page 153
student center 179
  pages used for 180
Student Center component (SSS_STDNCTR_OPT) 16
Student Center Options page 16, 17
Student Center page 62, 180
Student Financials self service
  account activity, viewing 69
  account summary 67
  business unit labels 36
  charges 72, 73
  charges due details, viewing 70
  charges, viewing 65
  due dates 71
  ePayment for institution sets 32
  financial aid, viewing 65
  institution sets 24
  merchants 23
  options 36
  overview 3
  pages used for 24, 36, 66, 78, 81
  payment amount 84
  payment confirmation 87
  payment details 82
  payment history 74, 75
  payment messages 36
  payment method 81
  payment profile details 78
  payment profile summary 78
  payment profiles 77
  payment result 88
  payments 79
  payments, viewing 65
  pending financial aid 76
  setting up 23
Student Financials self-service
  using 65
Student Profile page 203
Student Records component (SSR_SS_ENRL_OPT) 11
Student Records self service
  advisors 141
  class rosters 184
  class schedule 58
  class search 14
  classes, adding 59
  classes, dropping 60
  classes, editing 61
  classes, swapping 60
  degree progress/graduation 143
  enrollment 57
  enrollment appointments 58
  enrollment verifications 141
  enrollment wish list 59
  exam schedule 62
  faculty center 20, 181
  grade roster 183
  grades 139
  grades, entering 183
  graduation, applying for 143
  instructor pages 184
  learning management services (LMS) authentication 62
  learning management system (LMS) 184
  overview 2
  pages used for 12, 16, 21, 58, 59, 60, 61, 62, 139, 140, 141, 142, 143, 144, 145, 146, 180, 182, 183, 184, 185
  setting up 11
  setup components 11, 16, 20
  student center 16, 179

transcripts, official 139
transcripts, unofficial 140
transfer credit 145
using 139
weekly schedule time periods 16
Student Records Setup page 12
Students Without Email Address page 183
Submit page 188
suggestions, submitting xxii
surcharges
see convenience fee 34
Swap Classes - Confirm your selection page 61
Swap Classes - View Results page 61
Swap page 61

T

terms 209
Test Results page 188
To Do Item page 138
to do list 20, 138
To Do List page 138
To Do List Summary page 154
Transcript Note page 183
Transcript Request Confirmation page 140
transcripts 139, 140
transfer credit 145
Transfer Credit Model Information page 147
transfer credit models 145
Transfer Credit Results Detail page 148
Transfer Credit Results page 148
Transfer Credit Source Information page 147
tuition calculation
self service triggers 32
type control
setting up 7
Type Control page 7
typographical conventions xx

U

understanding 5
Unofficial Transcript page 141, 154
User Preferences page 130, 131

V

View My Grades page 139
View My Weekly Schedule page 182
View Previously Requested Reports page 141, 156
View Transfer Credit Report page 145, 154
visa and passport data 135
visual cues xxi

W

warnings xxi
Web Prospect Create component (ADM_WEB_PRS_SETUP) 51
Web Prospect Setup 2 page 52, 53
Web Prospect Setup page 52
Weekly Schedule page 59, 154
Weekly Schedule Time Period component (SETUP_TIME_PERIODS) 11
Weekly Schedule Time Period page 16
Weekly Schedule Time Periods page 12
wish list
using 59
Wish List page 59
work experience 137
Work Experience page 137
worksets 158

Y

Your Holds page 138
Your request for information has been processed page 188