PeopleSoft®

PeopleSoft 8 SP1
Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook

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Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook
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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

See *Using PeopleSoft Applications.*

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. 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 database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related 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 Website, http://www.peoplesoft.com/corp/en/login.asp

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 PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode 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 number 0, not 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 W.
`Monospace font`	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below 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.

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.

A note that is preceded by *Important!* 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.

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 in These 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.

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).

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

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.

Request ID An ID that represents a set of selection criteria for a report or process.

User ID An ID that represents the person who generates a transaction.

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.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Student Administration and Contributor Relations Solutions Preface

This preface discusses:

- PeopleSoft Application Fundamentals.
- Standard Field Definitions and the Glossary of Terms.
- Common Elements for This PeopleBook.

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

PeopleSoft Application Fundamentals

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

- *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook* (this PeopleBook)
- *PeopleSoft Campus Community Fundamentals PeopleBook*

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

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

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

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions deliver certain processes that are designed to enable integration with JetForm forms solutions. The integration with JetForm is included in the documentation about each process. JetForm Corporation is a PeopleSoft partner whose products require separate customer licensing for use. Additional information about JetForm is available on Customer Connection or at JetForm's web site www.jetform.com.

Standard Field Definitions and the Glossary of Terms

For a list of definitions of terms and acronyms frequently used throughout PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions, refer to the reference below.

A list of Standard Fields used in PeopleSoft documentation is available in *About These PeopleBooks.*

See Also

PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions, "Glossary"

About These PeopleBooks: PeopleBooks Standard Field Definitions

Common Elements for This PeopleBook

Access Code

Select how much security access a user should have.

Read/Write: Gives the user ID the security clearance to read information and add/change data for the selected item.

No Access: Does not allow the user ID to access the selected item. You can also simply remove the item from the page if you want to not give access to the user ID.

All Access

Click this button to give access to all of the items you are securing. For example, you could give access to all academic programs or all academic institutions.

When you click this button, *ALL* appears in the left column, and *Read/Write* appears in the Access Code field.

CHAPTER 1

Getting Started With PeopleSoft Student Administration and Contributor Relations Solutions

This chapter:

- Introduces PeopleSoft Student Administration and Contributor Relations Solutions.
- Reviews implementation prerequisites and dependencies.

Introducing PeopleSoft Student Administration and Contributor Relations Solutions

Following is an overview of the PeopleSoft Student Administration and Contributor Relations Solutions applications.

This section discusses:

- PeopleSoft Campus Community
- PeopleSoft Recruiting and Admissions
- PeopleSoft Student Records
- PeopleSoft Academic Advisement
- PeopleSoft Student Financials
- PeopleSoft Contributor Relations

PeopleSoft Campus Community

PeopleSoft Campus Community is used by every component of PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions, providing many features basic to all of the applications.

PeopleSoft Campus Community enables you to maintain and manage a wide range of biographical and demographic information about people and organizations of interest to your institution. PeopleSoft Campus Community includes the following functionality:

- *People Data Management*—Using this functionality, you can create and maintain name and address information, as well as identify profiles of the individuals who comprise your campus community.
- *Organization Data Management*—This functionality enables you to maintain data about the schools and other organizations important to your institution, including contact names and phone numbers.

- *Communications, Checklists, and Comments*—Campus Community's 3C's (Comments, Communications, and Checklists) enable you to create, track, and assign, interactions you have with prospects, applicants, students, alumni, donors, and external organizations. All users of your PeopleSoft system share the 3C's; this is important to consider when designing your 3C setup.
  - *Communication Management*—Use this functionality to manage all of your institution's contacts with students, prospects, recruits, staff, alumni, donors, and organizations.
  - *Checklist Management*—With this functionality, you can create lists to track activities and dues dates, and identify the status of those activities at any time.
  - *Comment Management*—You can use the comments features to enter notes in your database for individuals, organizations, or events.

PeopleSoft Recruiting and Admissions

PeopleSoft Recruiting and Admissions administers your institution's admission process by managing recruiters and tracking your prospects and applicants. Admissions offices will have the ability to empower prospective students through the self-service applications offered with PeopleSoft 8. Your PeopleSoft Recruiting and Admissions application includes automated processes such as application evaluations, external test score loading, recruitment category assignment, application loading from test score data, and academic transcript loading using the PeopleSoft EDI Manager tool.

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

PeopleSoft Recruiting and Admissions includes the following functionality:

Comprehensive Recruiting Capabilities

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

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

Flexible Application Processing

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

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

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

Enrollment Management Features

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

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

PeopleSoft Student Records

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

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

- *Establishing Catalog and Schedule Options* reviews all setup required to enable course catalog and schedule of classes definition.
- *Creating the Course Catalog* shows you how to set up Courses, Requisite Groups, Equivalencies, and Course Lists.
- *Scheduling Classes* discusses all the steps to schedule classes, search for facilities, and roll the schedule from term to term.
- *Managing Instructor Workload* discusses how to update, track and report workload hours for individuals.
- *Activating Students* discusses how to maintain student program, plan, and sub-plans and how to activate students.
- *Managing Transfer Credit* discusses all setup required for processing transfer credit and discusses how to evaluate, process, and post course, test, and other transfer credit using defined rules or manual rules.
- *Enrolling Students* reviews how to create enrollment appointments, enroll students, manage wait lists, and view summary statistics.
- *Managing Attendance Tracking* discusses how to prepare the system for student attendance, how to generate attendance rosters, and how to track student attendance.
- *Managing the Student's Academic Record* reviews all setup tables to track non-course related student data such as Extracurricular Activities, Committees, and Service Indicators. It also reviews how to link milestones to student records, manage the honor/award process, manage the academic standing process, track student groups, maintain service indicators and maintain extracurricular activities.
- *Evaluating Academic Work* shows you how to set up Grading Basis Exception Rules, Degrees, Degree Honors, and Transcript Types. It discusses how to generate grade rosters, enter grades as well as reviews running the repeat checking process, the mid-term deficiency report, and the grade lapse process. It also discusses how to graduate students and discusses how to define a transcript request and produce transcripts.
- *Reporting Academic Statistics* discusses how to prepare the system to consolidate academic statistics for students, how to run processes that consolidate academic statistics, and how to make use of the consolidated statistics after processing them.
- *Monitoring SR Process Messages* shows how to view PeopleSoft Student Records process messages through the message log.

PeopleSoft Academic Advisement

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

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

- *Setting Up PeopleSoft Academic Advisement* explains the concepts used in PeopleSoft Academic Advisement.
- *Establishing Academic Course Lists* describes how to create and use academic course lists.
- *Establishing Academic Requirements* describes how to create and use academic requirements.

- *Establishing Academic Requirement Groups* describes how to create and use academic requirement groups.
- *Reviewing the Requirement Group, Requirement, and Course List Summaries* describes how to use the PeopleSoft Academic Advisement summary pages.
- *Sharing Courses* explains how courses can be used by more than one requirement group.
- *Using Course Substitution, Course Directives, and Course Overrides* explains how to modify existing requirements and make exceptions for a specific student.
- *Creating and Using Expanded Conditions and Custom Conditions* describes how to create and use expanded conditions as well as custom conditions.
- *Requesting the PeopleSoft Academic Advisement Reports* describes how to create and request degree progress reports, administrative reports, and summary reports.
- *Using the Analysis Database to Create Customized Reports* describes the analysis database tables and how to retrieve data stored in each academic advisement table.

PeopleSoft Financial Aid

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

- *Setting Up Your Financial Aid Awarding Cycle* discusses defining the boundaries for each financial aid year, associating the aid year with your school code, identifying careers for each aid year and school code, and defining valid terms for a career.
- *Managing Financial Aid Terms* describes how to use the information provided by the system to validate a student's eligibility to receive aid and to establish a student's budget and proceed toward the awarding process. This information includes the student's career, primary program, academic plan, enrollment, academic level and standing, and financial aid standing.
- *Setting Up Financial Aid Item Types* explains how to define Financial Aid Item Types, add fiscal limits for Financial Aid Item Types, set up aggregate programs, update aggregate aid limits, set up award messages, and add loan fees to award item types.
- *Setting Up and Working with Student Budgets* describes how to create the budget categories, items and formulas you need to manage the budget process.
- *Defining Application Processing Options* explains how to control the flow of incoming and outgoing financial aid data. It covers setting up global options and defines how to handle both federal and institutional need analysis methodologies.
- *Processing Financial Aid Applications* covers using the PeopleSoft EDI Manager to load and manage data file loads for ISIR, Pell RFMS, Direct Loan, and CommonLine file formats. In addition it covers processing applications, requesting duplicate ISIRs, managing corrections, using suspense management, maintaining institutional information, reviewing correction audits, reviewing EFC summary detail, and using application processes.

- *Maintaining Institutional Applications* documents the institutional financial aid application and provides data maps for each page for the Profile financial aid application.
- *Assessing Eligibility for Financial Aid* provides a summary of a student's financial aid application, creating and processing student budgets, award packaging information, loan history, verification setup, auto and mass verification, and INAS simulation.
- *Establishing Awarding and Packaging Rules* explains how to create packaging equations and packaging plans—which will be used in automated packaging processes—and how to set up disbursements plans, disbursement split codes, and early financial aid award categories.
- *Awarding and Packaging Financial Aid* describes all aspects of the awarding and packaging process, including monitoring awarding of restricted aid, online awarding, auto packaging, mass packaging, award notification letters, award activity, and anticipated aid.
- *Processing CommonLine Loans* gives you the information you need for CommonLine loan processing. It includes setting up loan types, entering vendor information, using the PeopleSoft EDI Manager for processing files, setting your loan processing options, and creating report packages.
- *Processing Direct Loans* provides you with the information you need for Direct Lending loan processing. It covers origination, creating promissory notes, making corrections to loans, using the PeopleSoft EDI Manager for processing files, disbursing loans, and loan data reconciliation.
- *Processing Pell Payment* provides the tools to set up Pell reporting and payment processing and describes how to send and receive Pell Payment data files.
- *Establishing Disbursement Rules* explains how to set up your authorization and disbursement rules for disbursing awarded financial aid.
- *Authorizing and Disbursing Financial Aid to Students* describes the online and background authorization and disbursement processes.
- *Understanding Self-Service for Financial Aid* presents all the self-service pages for financial aid.
- *Processing Return of Title IV Funds* describes how you can use PeopleSoft Financial Aid to process the return of Title IV funds.
- *Managing Student Employment* provides information to verify and assign Work-Study to an approved student.
- *Using the Fiscal Operation Report and Application to Participate (FISAP)* describes how to generate key sections of the FISAP report.

PeopleSoft Student Financials

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

PeopleSoft Student Financials receives information from virtually all areas of the PeopleSoft Student Administration Solutions. The information is used to calculate fees and tuition, maintain customer account information, create bills, establish payment plans, perform cashiering, and process collections. In addition, PeopleSoft Student Financials is designed to interface with your current general ledger system. Using the reporting functionality, you can also manage certain aspects of your tax process, including the creation of U.S. 1099-T and Canadian T2202A tax returns.

- *Setting Up Student Financials* discusses the steps for setting up a Business Unit and setting up basic tables required prior to using Student Financials.

- *Administering Your General Ledger Interface* describes how to use the General Ledger Interface process to transfer account information from PeopleSoft Student Financials to your general ledger system.
- *Calculating Tuition and Fees* discusses how to set up your fees, billing and due date calendars, course lists, and tuition groups. This section also details how to calculate tuition and fees for individuals, as well as tuition groups.
- *Refunding Tuition and Fees* describes the steps for setting up your system to generate refunds using either Accounts Payable or the Payroll Interface. The section also details creating a refund from a student's account for someone other than the student.
- *Administering Payment Plans* discusses the major payment plans you can create in Student Financials such as the Third-party Payment plan, the Multi Year Payment Plan, and the Pre Payment Plan.
- *Billing Customers* details the steps you need to take in order to generate a student's bill.
- *Cashiering* details how to track large amounts of cash, checks, and credit card receipts. This section also demonstrates aspects of credit card processing, as well as monitoring receipt flows.
- *Maintaining Receivables* describes functions such as Quick Post, Quick Write off, Class Cancellation, and Late Fee Processing.
- *Maintaining Customers* discusses maintenance processes such as reviewing Credit History, overriding billing information, and creating a waivers table.
- *Collecting Receivables* describes the collection process.
- *Reporting Taxes* describes how to generate the US 1099-T and the Canadian T2202A tax data, and how to set up and print tax forms.

PeopleSoft Contributor Relations

PeopleSoft Contributor Relations is a comprehensive solution that helps contributor relations professionals to optimize strategic planning and decision making. The application seamlessly integrates with other PeopleSoft applications such as Student Administration, Financials for Public Sector, and Human Resources for Public Sector to create an enterprise-wide organizational solution.

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

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

The eight component functions within PeopleSoft Contributor Relations are:

- *Constituent Information*
- *Gift and Pledge*
- *Prospect Manager*
- *Event Manager*

- *Campaign Manager*
- *Volunteer Manager*
- *Membership Manager*
- *Planned Giving*

Reviewing Implementation Prerequisites and Dependencies

This chapter provides an overview of the dependencies within PeopleSoft Student Administration and Contributor Relations Solutions and discusses implementation considerations for:

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

Understanding Dependencies within Student Administration

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

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

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

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

Preparing for Campus Community and Your Institutional Structure

Detailed information for the following setup tasks can be found in the *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook* and the *PeopleSoft Campus Community Fundamentals PeopleBook.*

Preliminary setup tasks:

- Set up your Human Resources Organization Codes.
- Set up your Finance Organization Codes.
- Coordinate the setup of Establishment ID, Locations, Campuses, Departments, and Facility Tables with PeopleSoft Human Resources and PeopleSoft Financials.

Preparing for Student Records

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

Preliminary setup tasks:

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

Preparing for Recruiting and Admissions

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

Preliminary setup tasks:

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

Preparing for Academic Advisement

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

Preliminary setup tasks:

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

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

Preparing for Financial Aid

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

Preliminary setup tasks:

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

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

Preparing for Student Financials

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

Preliminary setup tasks:

- The Institutional Structure/PeopleSoft Campus Community, PeopleSoft Recruiting and Admissions, and PeopleSoft Student Records setup sequences must be completed prior to setting up your PeopleSoft Student Financials system.
- If you interface PeopleSoft Student Financials with PeopleSoft General Ledger for Education and Government, you must run the GL Interface process to load Chartfield and other GL setup data from the PeopleSoft Financials environment into your PeopleSoft Student Administration database.

  Coordinate with your Financials counterparts to ensure you are using valid account and chartfield combinations.
- If you run student financials refunding through PeopleSoft Payroll, you must create a Refunding Company and Refunding Paygroup using PeopleSoft Payroll.

  Coordinate the setup of Student Financials Business Unit − Payroll/Tax parameters with Payroll, and ensure Job and Tax Record Creation flags are turned on for each PeopleSoft Student Financials Business Unit that generates refunds through Payroll.

- If you run student financials refunding through PeopleSoft Financials, you must create an AP Business Unit and AP Vendor Set Controls.

  Work with your AP counterparts to define the correct AP business unit because they should match between products.
- Review 3Cs—Communications, Checklists, and Comments—and service indicator setup to make sure your PeopleSoft Student Financials needs of these features are in place.
- Coordinate the setup of item types and keywords with PeopleSoft Financial Aid and PeopleSoft Contributor Relations.
- Coordinate the setup of application and deposit fees with PeopleSoft Recruiting and Admissions.

Preparing for Contributor Relations

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

Preliminary setup tasks:

- The Institutional Structure/PeopleSoft Campus Community setup sequence, including departments, must be completed prior to setting up your PeopleSoft Contributor Relations system.
- Coordinate the setup of item types with PeopleSoft Student Financials.

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

Preparing for Gradebook

Detailed information for the following setup tasks can be found in the *PeopleSoft Gradebook PeopleBook.*

Preliminary setup tasks:

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

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

Preparing for Campus Directory Interface

PeopleTools 8.1 enables you to integrate PeopleSoft security with LDAP (Lightweight Directory Access Protocol) directories to authenticate directory users. With PeopleSoft Campus Directory Interface, you can share the data that already exists and is maintained in your PeopleSoft Student Administration Solutions database with your directory. PeopleSoft Campus Directory Interface simplifies directory setup and ensures that the user data in the directory matches the selected PeopleSoft data and simplifies data maintenance.

See *PeopleSoft 8 SP1 Campus Directory Interface PeopleBook*

CHAPTER 2

Working with Campus Community and Using HRMS Menus

This chapter discusses:

- Working with Campus Community
- Using PeopleSoft Human Resources Management System menus

Working with Campus Community

PeopleSoft Campus Community is a fundamental piece of your PeopleSoft Student Administration and Contributor Relations Solutions system. It is very important that you look at your *PeopleSoft Campus Community Fundamentals PeopleBook* early in your implementation process. PeopleSoft Campus Community is the foundation for managing data about people and organizations in your system. Campus Community is also used to create communications and checklists, which are used to create mailings and track required items. All the functional groups at your institution should be involved in setting up the Campus Community aspects of your system, since they all have an interest in how the data is stored in Campus Community.

Using Human Resources Management System Menus

PeopleSoft Student Administration and Contributor Relations Solutions are built on top of the PeopleSoft Human Resources Management System (HRMS) database. This enables integration of your Human Resources data and Campus Community data.

Because of the integration of HRMS and PeopleSoft Student Administration and Contributor Relations Solutions, there are some menus that are not used by PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions, but that appear in your system. If you need to learn more about these items, refer to the PeopleSoft HRMS documentation.

- Under the *Home* menu, the following items are documented by HRMS.
  - *Develop Workforce*
  - *Administer Workforce*
  - *Compensate Employees*
  - *Monitor Workplace*
  - *HR Self Service*

- Under the *Home, Define Business Rules* menu, the following items are documented by HRMS.
  - *Administer HR System*
  - *Define Automated Benefits*
  - *Define Base Benefits*
  - *Define Benefits Billing*
  - *Define COBRA*
  - *Define Company Cars (GBL)*
  - *Define FSA*
  - *Define Payroll Interface*
  - *Define Payroll Process*
  - *Define Payroll Taxes*
  - *Define Retroactive Process*
  - *Define Time and Labor*
  - *Maintain Pension Parameters*
  - *Maintain Pension Plans*
  - *Maintain Service Parameters*
  - *Manage Human Resources (GBL)*
  - *Manage Integration Rules*
- Under the *Home, Define Business Rules, Define General Options* menu, the majority of the pages are documented by HRMS. The pages under this menu that are used by PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions are documented in this book, the *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.*

CHAPTER 3

Introducing Business Units and Data Sharing

This chapter provides an overview of business units and discusses how to:

- Decide on a business unit structure.
- Share data among business units.
- Implement tableset shaing.

Understanding PeopleSoft Business Units

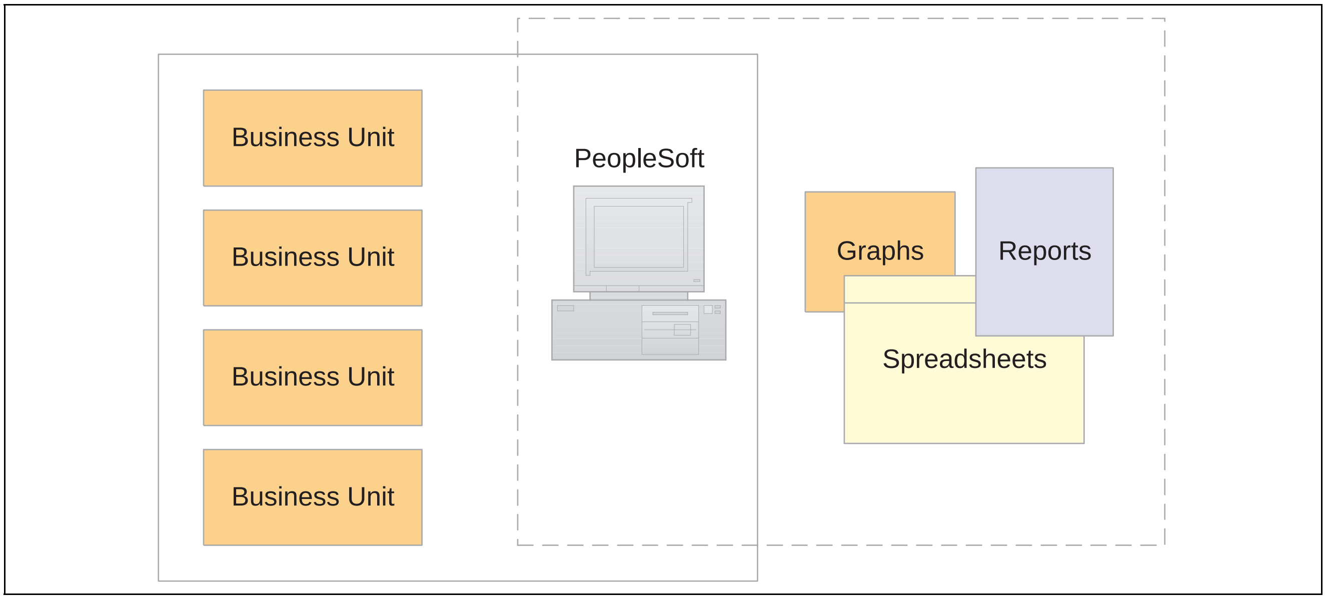
Before you implement the PeoleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions applications for your institution, take a close look at how your institution functions operationally. To make the most of PeopleSoft's flexible design, you have to first decide how you want to "map" your operational structures into PeopleSoft applications.

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

Business units can mean different things to different applications within PeopleSoft. For example, PeopleSoft Student Financials and PeoleSoft General Ledger business units typically comprise different entities for financial and tax reporting purposes. You can share business units across any combination of applications in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions, or define them within just one application. If your entire institution keeps only one set of books, then you can have only one business unit. You must have one business unit defined for each PeopleSoft application installed but all applications can share the same business unit. So, a minimum of one business unit is required for the entire suite of applications in your PeopleSoft Student Administration system.

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

While each business unit keeps its own set of books, your institution can still maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit and ensuring consistent and accurate consolidated results. More importantly, you'll be able to produce reports across business units, enabling you to see the big picture or compare and contrast the finest details.



Centralized data enables analysis and reporting across business units

Deciding on a PeopleSoft Business Unit Structure

Business units offer a flexible structuring device through which you can implement each PeopleSoft application based on how your institution is organized. In some institutions, the correspondence between existing structures and the organizational model is quite obvious. In other cases, it can take a bit of careful analysis to determine how to set up your business units so that they reflect your institution and enable you to get the most out of the system.

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

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

Examine your existing codes and IDs and compare them with the concept of the business unit in PeopleSoft. Consider whether you can make a simple mapping of your existing structures onto business units, or whether this might be a good time to modify your structures based on the flexibility afforded by PeopleSoft.

Note. You want to work closely with your PeopleSoft implementation partner early in your design to determine how best to define business units for your PeopleSoft Student Administration and PeopleSoft Contributor Relations Solutions system.

Sharing Data Among Business Units

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

This section provides an overview of tableset sharing and:

- Reviews control tables keyed by tableset ID.
- Introduces record groups in tableset sharing.
- Explains how business units, tablesets, and record groups fit together.
- Explains the Set Control Value.
- Reviews how centrally maintained data is shared.

Understanding TableSet Sharing

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

Control Tables

Store 'master lists' of information, for example, department names and account codes. This data is maintained centrally by the institution and is generally entered once at implementation, then changes little over time.

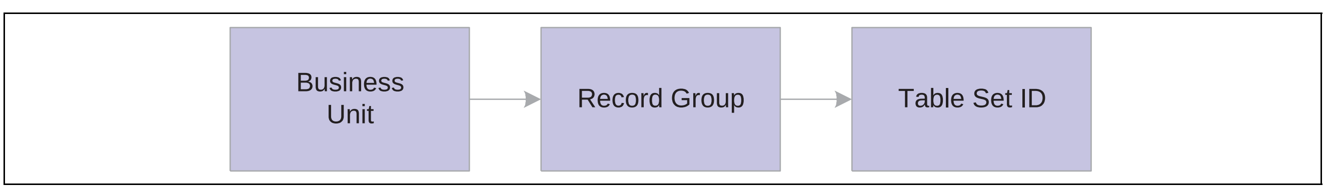
The structure and processing rules for each of the PeopleSoft applications you are using are defined in a series of control tables.

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

Transaction Tables

Store day to day business activity and are updated frequently. These tables are keyed by business unit.

A new concept −*tableset ID*− was introduced in the definition of the control table. The tableset ID is what allows tableset sharing. The tableset ID indicates which of the rows in the control table a particular business unit can access. Each row in the control table has a tableset ID associated with it and business units are associated with tableset IDs through Record Groups.



Business Units and Table Set IDs associated through Record Groups

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

If much of your control table data is the same from business unit to business unit, tableset sharing enables you to share that information among business units instead of having to enter the same data multiple times. For example, let's say you have ten business units and they all use the same accounts. Instead of having to enter all of your accounts ten times, you could simply enter them once and set up tableset sharing to enable all of your business units to access them.

TableSet sharing also enables you to manage exceptions within your organization. For example, let's say nine of your ten business units use the same accounts, but the tenth business unit uses entirely different accounts. This too is easily accommodated through tableset sharing.

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

View of the accounts for the three different campuses is shown.

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

View of the accounts for East Campus is shown.

Tableset ID	Account Number
EASTC	0000090347
EASTC	0000090349

See Also

PeopleTools: Data Management, "PeopleTools Utilities," Control Tables

Reviewing Control Tables Keyed by Tableset ID

Here are some examples of the control tables keyed by tableset ID for each application in PeopleSoft Student Administration and Contributor Relations Solutions. This information can help you decide how your data can be segmented so you can make the correct decisions when setting up your tableset IDs and then assign the correct tableset ID to a record group.

Note. This is not an exhaustive list.

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

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

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

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

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

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

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

Introducing Record Groups in TableSet Sharing

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

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

Record groups exist for two basic reasons:

1. To save time in data entry.

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

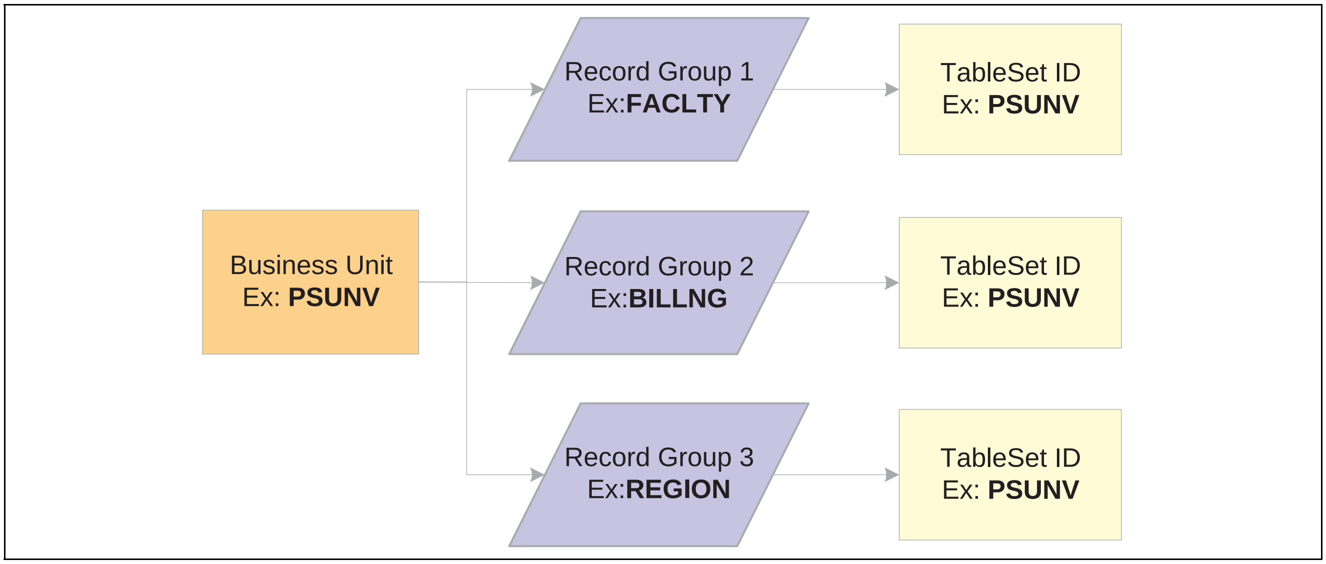
2. To provide consistency in your data.

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

Putting Business Unit, TableSets, and Record Groups Together

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

Note. PeopleSoft suggests that you create tableset IDs and business units that are five characters long. A performance degradation will occur if your tableset IDs or business units have fewer than five characters.



Relationship between business unit, record group, and tableset ID

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

Warning! You need to define at least one complete set of these tables—a tableset—for your PeopleSoft student administration system to function.

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

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

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

You are not required to share all tables in a tableset. With PeopleSoft Student Administration Solutions, you can share any combination of tables with any number of business units, according to your needs. Use the TableSet Controls pages in the Utilities menu to identify for each business unit which data should be shared and how it should be shared.

As a result of its design, tableset sharing can be extremely easy for an organization to design. In fact, it is almost entirely set up by the time you have finished creating your business units.

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

Explaining the Set Control Value

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

Here is an example of how this works. Imagine a community college district with three campuses.

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

Two of the campuses share Location and Facility information and all three share the Grading Scheme and Level/Load Rules. This means there are record groups that are shared.

Record Group	Shared by
FACILITY (Facility Table)	North Campus and West Campus
HR_03 (Location Table)	North Campus and West Campus
CAREER (Grading Scheme and Level/Load Tables)	North Campus, West Campus and Far South Campus

The table shows how the Set Control Value and tableset ID are used to identify which rows are returned in prompt boxes.

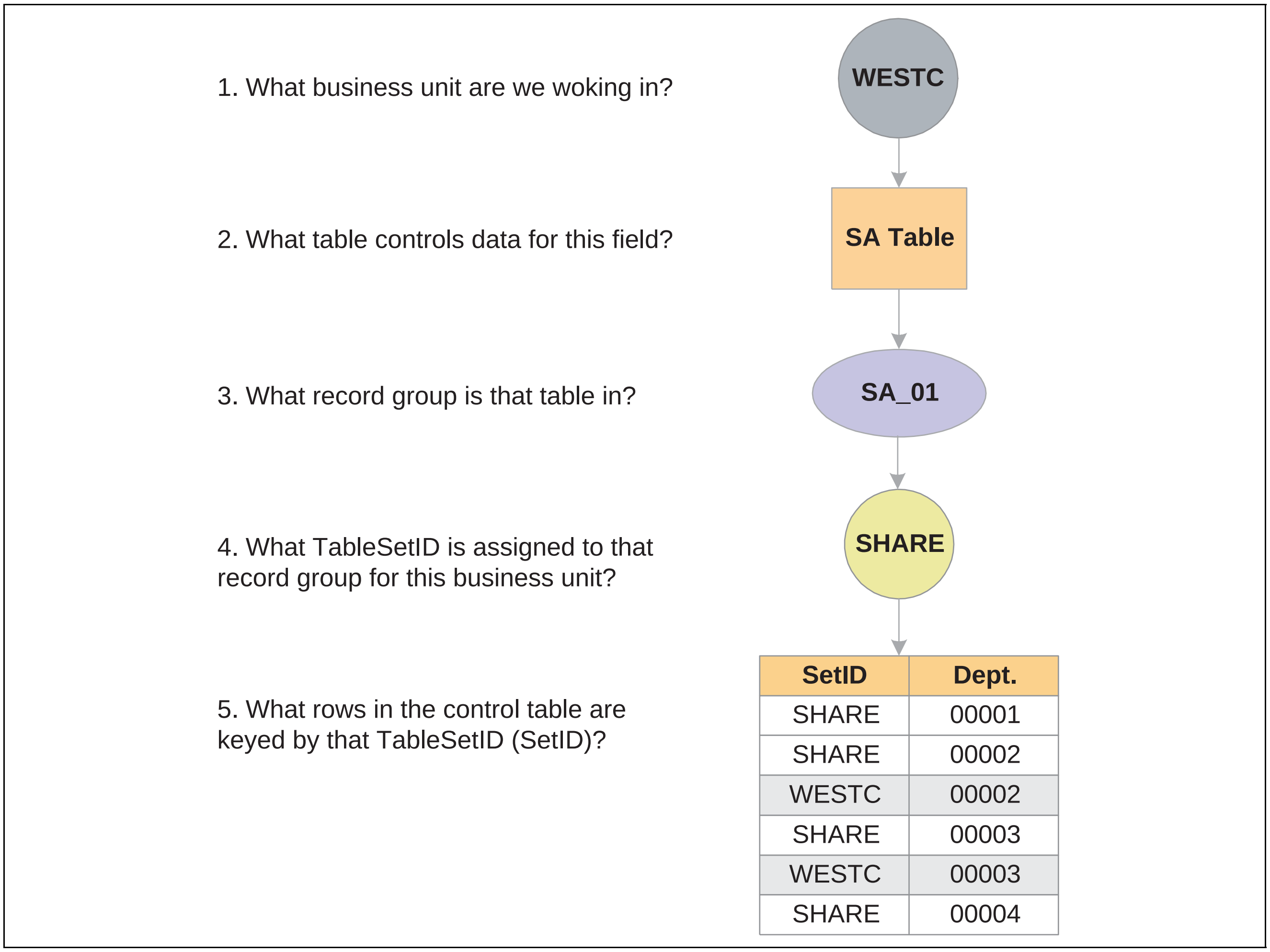
Set Control Value	Record Group	Tableset ID
NORTH	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
WESTC	FACILITY	NORTH
	HR_03	NORTH
	CAREER	CCMDO
SOUTH	FACILITY	SOUTH
	HR_03	SOUTH
	CAREER	CCMDO

Reviewing How Centrally Maintained Data is Shared

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

To understand how this works in the PeopleSoft system, you need to look at what happens when a user selects from a list box field. The list that appears contains all of the possible, valid entries that can be entered in that field based on what business unit is being used.

The following series of questions outlines the online process that occurs.



TableSet sharing process

Note. Record groups and set IDs for a Set Control Value have a one-to-one relationship.

Implementing TableSet Sharing

Once you have determined how many business units you need and how you want to organize them, you can create them for your PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions system and then implement tableset sharing.

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

Tableset IDs can be created as you set up your business units. If the Default SetID that you enter is creating a new business unit that does not exist, your PeopleSoft application automatically creates it; however, you can also create tableset IDs independent of business unit creation by using the TableSetID page.

To define tableset sharing for your organization, complete the steps for each of the following tasks.

To establish tableset sharing follow these steps.

1. Set up business units.
2. Define Record Groups (you can add new record groups if necessary).
3. Define tableset IDs for your organization to reflect your organization’s structure.

   This step may be optional. For example, it is not optional for PeopleSoft Contributor Relations Solutions if a setID matching the Contributor Relations Solutions business unit does not exist.
4. Update all of your TableSet Record Group Controls.

To link tableset sharing and system defaults to permission lists and/or business units follow these steps.

1. Set up Primary Permission List Preference Defaulting options (Required).
2. Set up all Business Unit HR Defaulting options (Optional).

This section discusses how to:

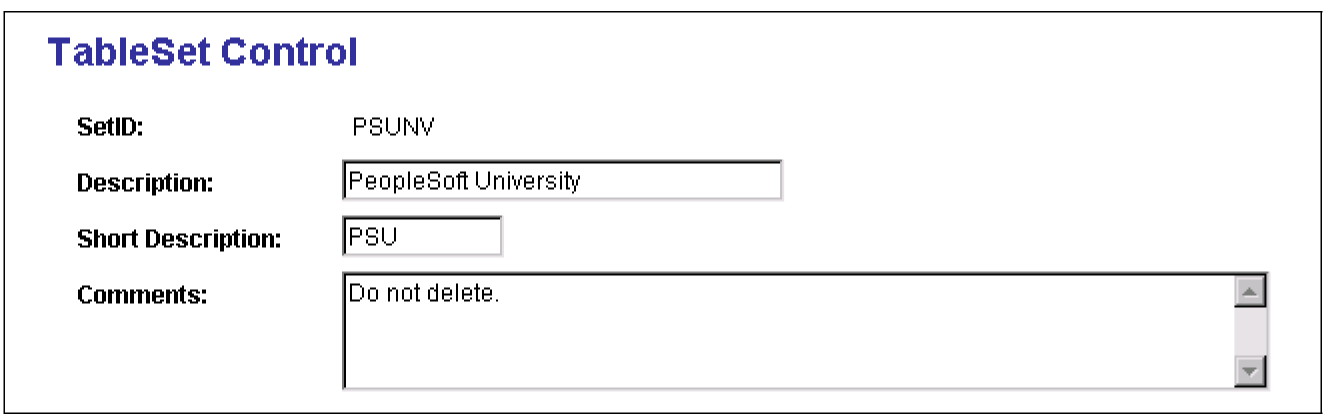
- Create tableset IDs.
- Review recrod groups.
- Create business units.
- Assign business units cross references.
- Adjust tableset sharing for record groups.
- Adjust tableset sharing using trees.

Pages Used to Implement TableSet Sharing

Page Name	Object Name	Navigation	Usage
TableSetID – TableSet Control	SETID_TABLE	PeopleTools, Utilities, Use, TableSetID, TableSetID	Create tableset IDs in your system.
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Use, Record Group	Review record groups to see which tables and views are included in each record group in your system. Record Groups are pre-defined for your system.
Business Unit	BUS_UNIT_TBL_HR	Define Business Rules, Manage Human Resources (US), Setup, Business Unit, Business Unit	Create business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Define Business Rules, Manage Human Resources (US), Setup, Business Unit, Business Unit Reference	Assign business unit cros references to identify business units in other PeopleSoft applications that relate to your business units.
TableSet Control – Record Group	SET_CNTRL_TABLE1	PeopleSoft, Utilities, Use, TableSet Control, Record Group	Adjust tableset sharing for record groups. Tableset sharing is set up as soon as you create your business units; however, you adjust tableset sharing by changing the tableset IDs that are assigned to individual record groups.
TableSet Control – Tree	SET_CNTRL_TABLE2	PeopleSoft, Utilities, Use, TableSet Control, Tree	Adjust tableset sharing using trees.

Creating Tableset IDs

Access the TableSet ID – TableSet Control page and create a new setID.



TableSet ID – TableSet Control page

Note. Your set IDs should be 5 characters in length for optimum performance with you system.

SetID PeopleSoft suggests that you create one setID (also known as a tableset ID) that does not match any of your business units and that you use that setID to key information that is generic throughout your system. PeopleSoft then suggests that all of the rest of your set IDs match the business unit with which they will be used. This method helps eliminate confusion.

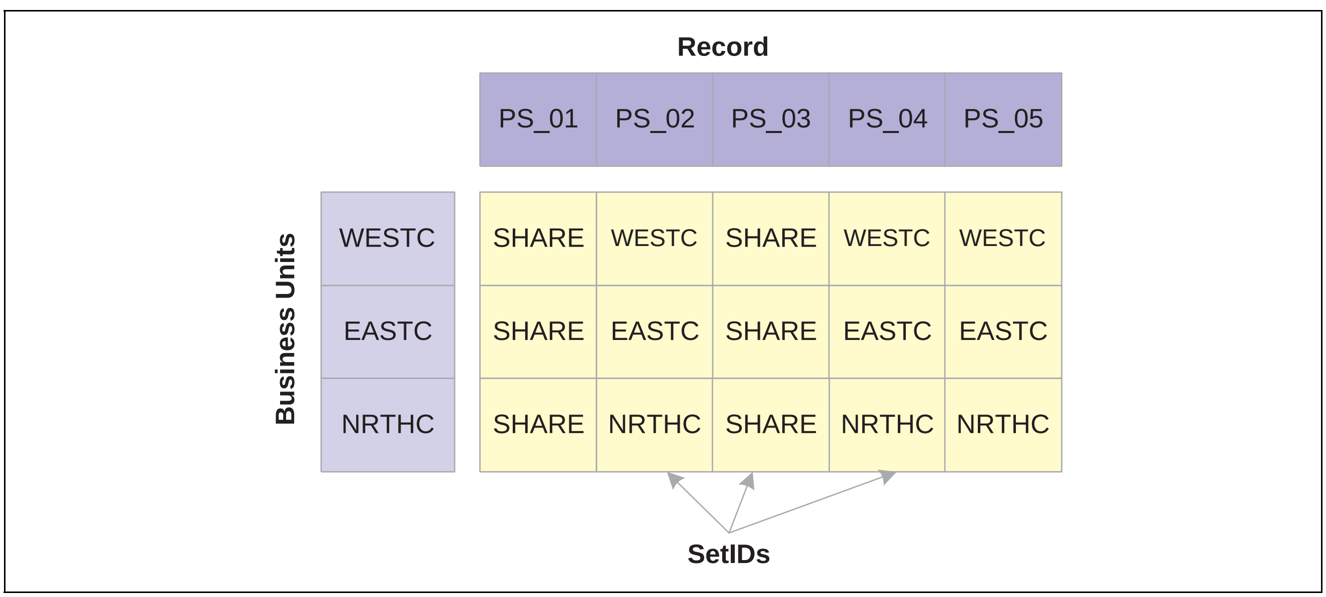
Creating Your Tableset IDs

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

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

If you want to use multiple tableset IDs to set up tableset sharing for the first business unit you create (before you have created any additional business units), you need to create tableset IDs in the TableSet ID page prior to defining your business unit.

PeopleSoft suggests that you create one tableset ID that does not match any of your business units to use to key information that is generic throughout your system. In examples, PeopleSoft uses the tableset ID *Share* to identify shared information. PeopleSoft suggests that the rest of your tableset IDs match the business unit with which they will be used. This method helps eliminate confusion.



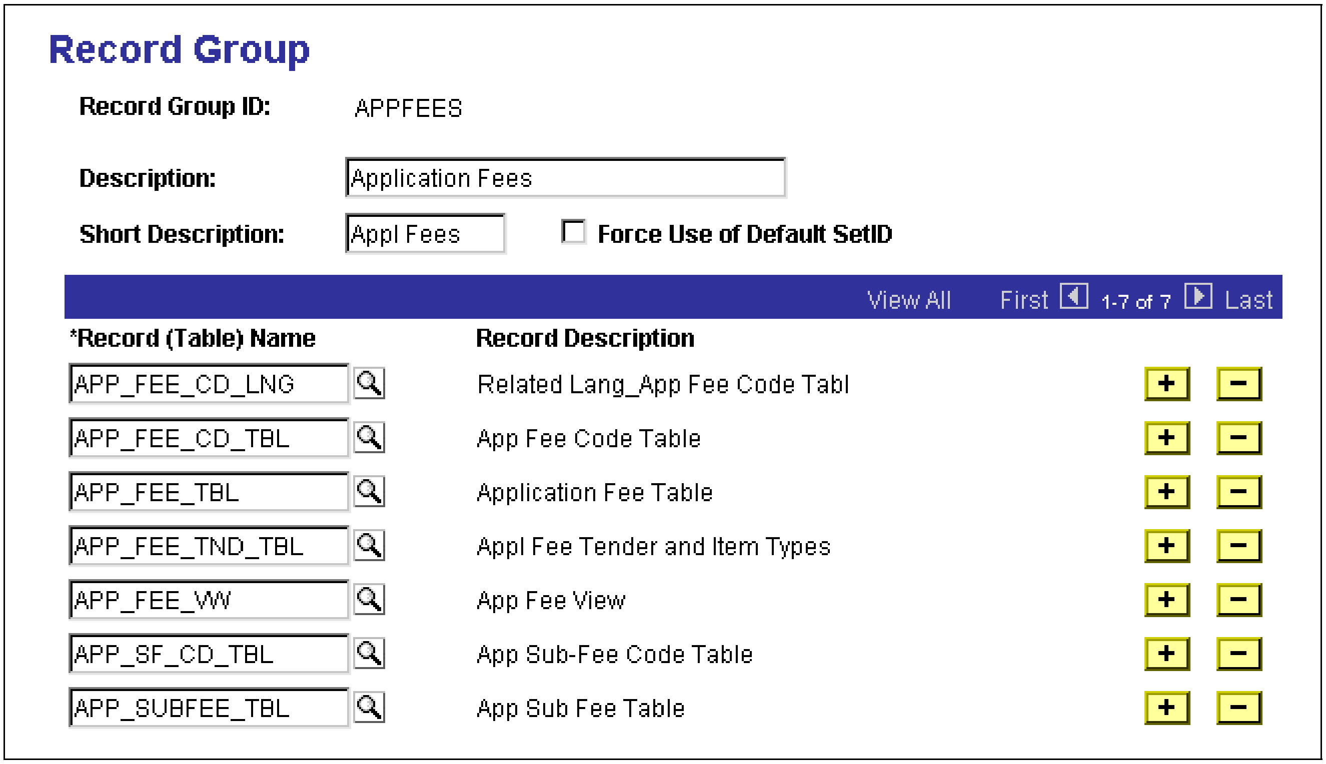
TableSet sharing matrix

See Also

PeopleTools: Application Designer, "Planning Records, Control Tables and TableSets," Understanding TableSets

Reviewing Record Groups

Access the Record Group page.



Record Group page

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

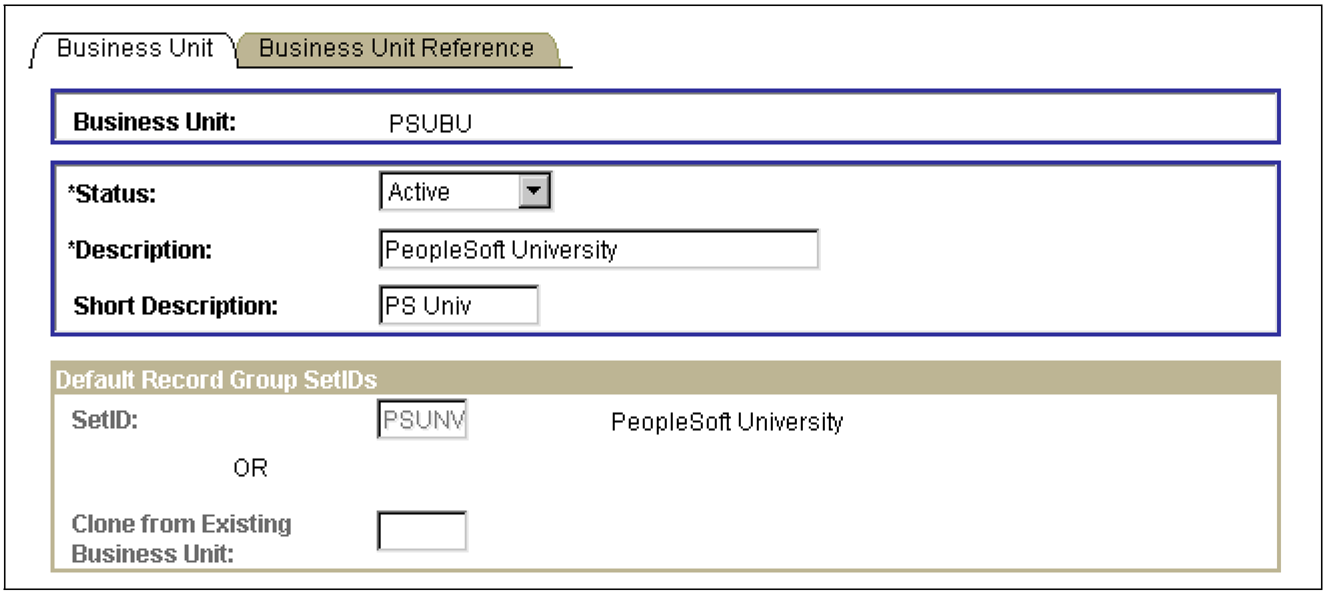
Warning! Record group definitions and the assignment of the individual tables and views to specific groups are provided to ensure complete and accurate tableset sharing within each functional area. PeopleSoft does not recommend that you change these record group assignments.

Record Group ID	The name you give the record group ID should be descriptive enough to encompass a category of related tables, not just the table you are specifically sharing.
Force Use of Default SetID	Select if you want to force the use of the default setID. Se up the Default SetID on the TableSet Control − Record Group page.
Record (Table) Name	The system displays the record name of all of the records that are part of the Record Group ID. Records (tables) are identified by a _TBL extension and views are identified with a _VW extension. A record group can contain a single table or many tables and views.
Record Description	The system displays the description of the associated Record (Table) Name.

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

Creating Business Units

Access the Business Unit page.



Business Unit page

Warning! In order to optimize system performance, your business units must be five characters. You will experience serious performance degradation if your or business units have fewer than five characters.

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

Status

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

SetID

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

For example, if your business unit is called MAINC, then the setID will default to MAINC. You can override the setID as necessary.

Clone from Existing Business Unit

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

For example, if you want the tableset sharing for the new business unit you are creating to mirror that of another business unit, or if you want the two units to be similar except for a few record groups, use this field.

Note. When you first enter the Business Unit page, the Clone from Existing Business Unit option is clear. To activate the option, clear any setID values from the SetID field, and move out of the field.

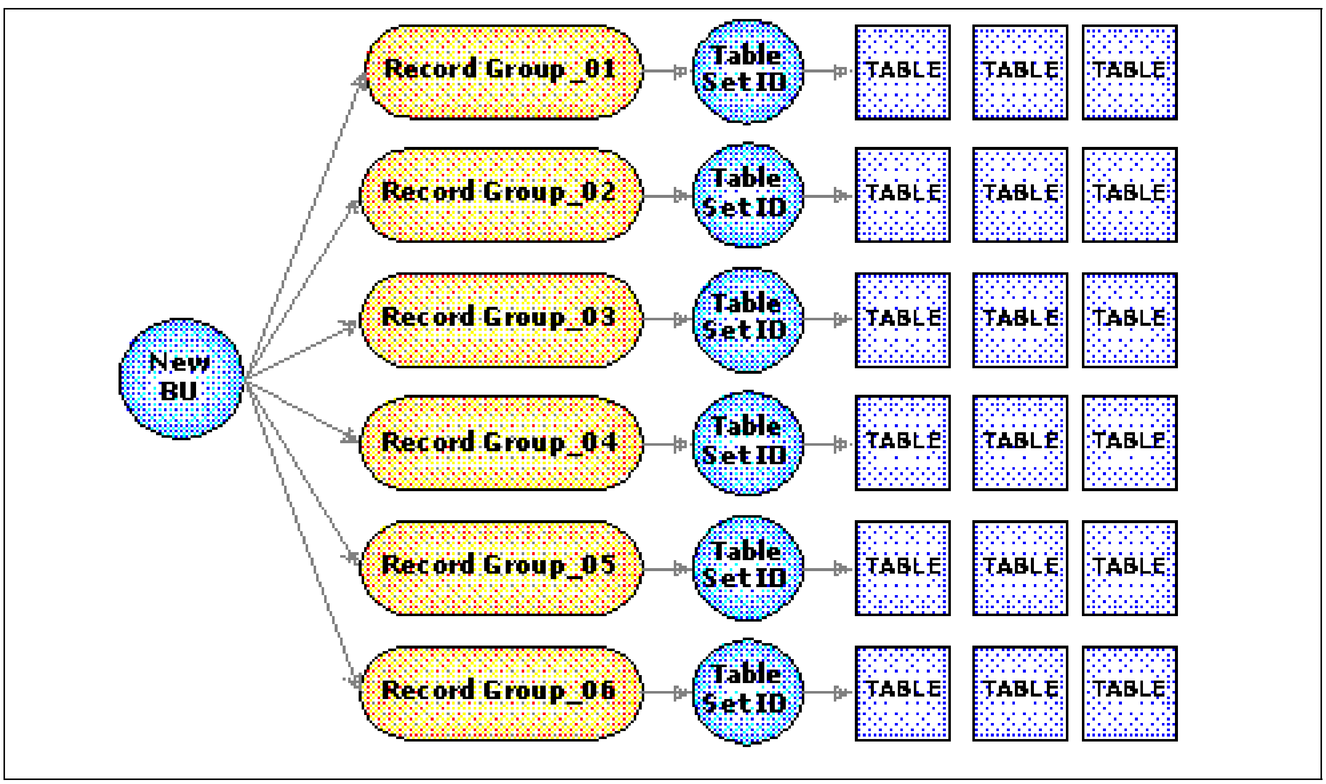
Note. When you save a new business unit for the first time, the system makes the Default SetID or Clone Unit unavailable for entry. You cannot change the Default Record Group SetID information for this business unit again. This rule prevents you from accidentally overwriting the TableSet Record Group Controls for your defined business units.

When you add a new business unit and save the page, the system creates all of the appropriate table values provided by PeopleTools that connect the Business Unit ID, the Record Group ID, and the SetID.

See *PeopleSoft 8 SP1 Student Financials PeopleBook*, "Completing PeopleSoft Student Financials General Setup," Setting Up Business Units.

Example of Business Unit and Tableset ID Association

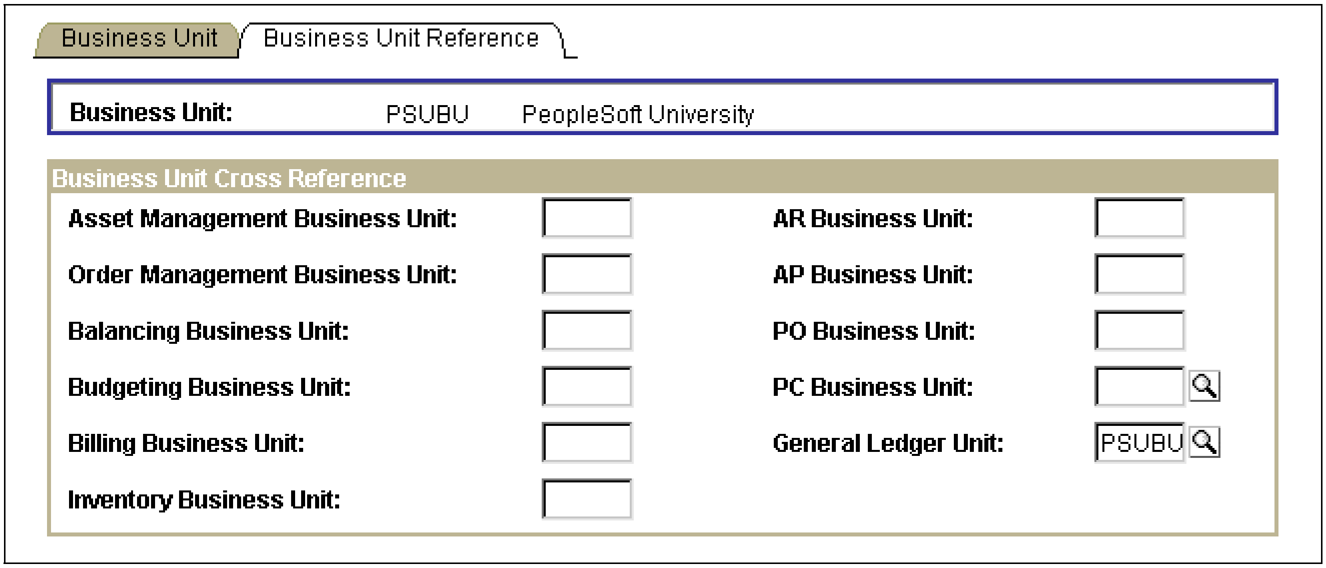
The following diagram shows how the business unit, record groups and tableset ID are associated. The business unit and tableset ID can have the same value.



Tableset sharing

Assigning Business Unit Cross References

Access the Business Unit Reference page.

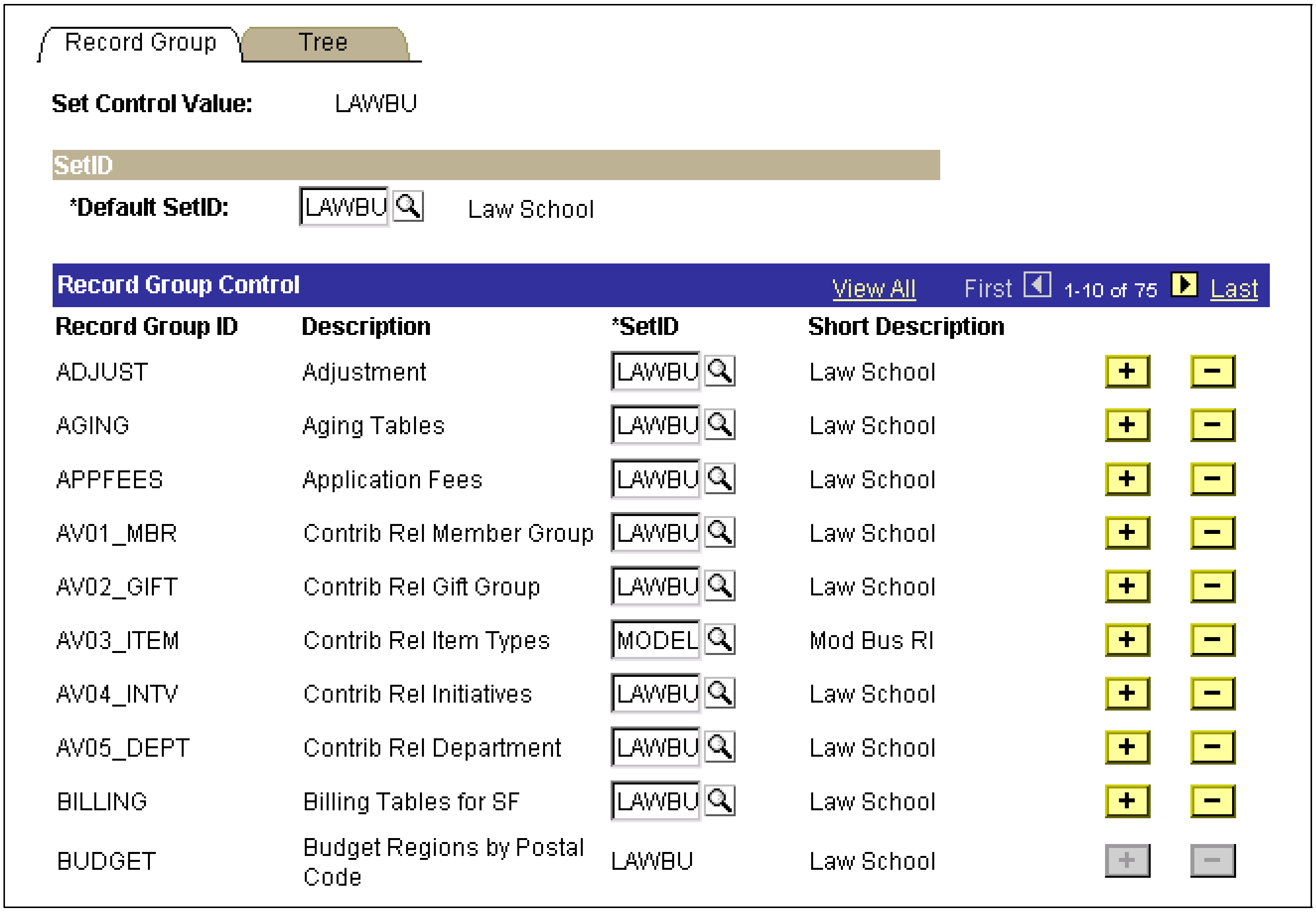


Business Unit Reference page

Indicate the Business Unit Cross Reference, if applicable, for any of the PeopleSoft applications listed on the page. You can identify business units in other PeopleSoft applications that relate to your business unit.

Adjusting TableSet Sharing for Record Groups

Access the TableSet Control – Record Group page.



TableSet Control - Record Group page

Default SetID

Select the default setID you want to use for this Set Control Value. The default setID is the tableset ID the system uses when you add additional record definition groups to be shared within this table set. If you have indicated that the system should force the use of the default setID (on the Record Group page) then you cannot change the SetID for the record group with a SetID that is different from the Default SetID you indicate here. The SetID for that Record Group ID will be unavailable for entry.

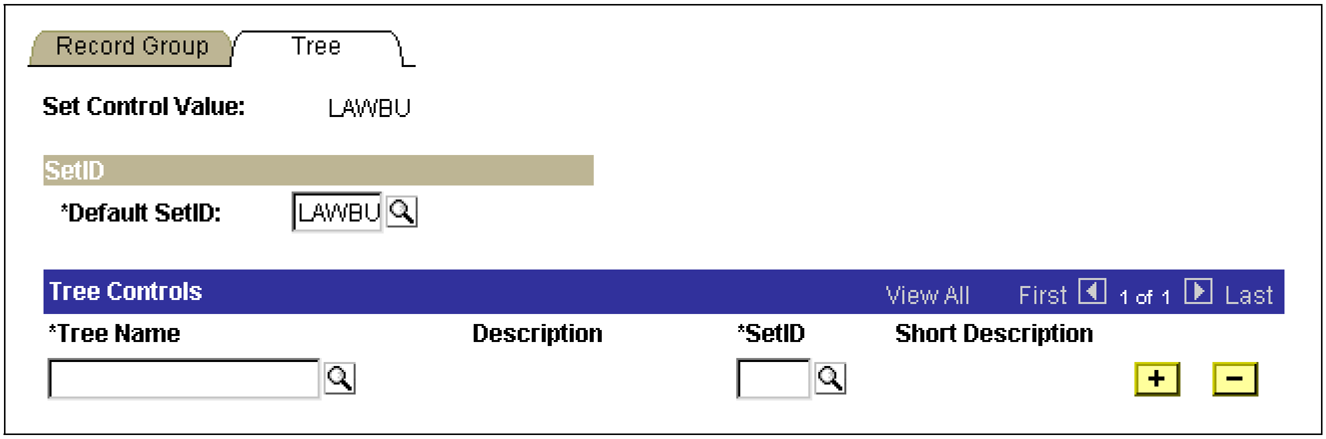
Remember that most record groups contain a number of tables and views. The tableset ID that you assign to that record group *must* represent the information that you want to use from each of the Control Tables contained in that Record Group.

SetID

For each Record Group ID, enter the SetID you want to use.

Adjusting TableSet Sharing Using Trees

Access the TableSet Control – Tree page.



TableSet Control – Tree page

Default SetID The Default SetID you assigned this field value is automatically displayed. If you created another tableset for sharing trees, you can change this value.

Tree Name Select from the available options the tree definitions that are defined with the same Set Control Field.

SetID Select the appropriate SetID.

CHAPTER 4

Preparing for Data Conversion

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

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

Understanding Data Conversion

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

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

Consider these tasks:

- Explore PeopleSoft Student Administration Solutions thoroughly before you convert any data.

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

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

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

- Test, test, test.

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

- Plan your conversion schedule.

  Because PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions is a fully integrated system with multiple applications, it is important to plan which applications will be converted in a specific order. You may convert your data any way you want, but this chapter suggests how to maximize your system, and hopefully, minimize any challenges you may encounter during conversion.

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

- PeopleSoft recommends that you select go-live dates (or a go-live term) for fall term, not mid-year. If you do choose a spring term as your go-live term, you may run into some serious problems. For example, in the case of PeopleSoft Financial Aid, the financial aid cycle starts months before the fall term. The Financial Aid office awards financial aid starting in the March/April timeframe for the Fall semester. So, timing the implementation will drastically impact the amount of data that needs to be converted as well as the complexity of the conversion process. Work closely with your partners, consultants, and account manager to determine the best go-live dates for your institution.
- PeopleSoft recommends that you convert names, addresses, and personal information first and as early as possible. From there you can choose the order of the conversion of each application. PeopleSoft suggests that you convert PeopleSoft Recruiting and Admissions and PeopleSoft Financial Aid, then PeopleSoft Student Records and PeopleSoft Student Financials. If you are using PeopleSoft Human Resources applications in addition to PeopleSoft Student Administration Solutions applications, it is critical that you coordinate your name, address, and personal information conversion process with the Human Resources conversion team. This will reduce the amount of clean up required and the duplicity and conflict of data once the data is converted.
- Select an Effective Date that is adequate for your own history. This issue can particularly arise in PeopleSoft Student Records.

Performing Data Conversion

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

- Decide how much data you will convert.

  You may choose to convert a different amount of data for each application. You may want to convert ten years worth of student records data, two years of admissions data, two years of financial aid data, and so on.
- Map your data to PeopleSoft data fields.

  In order to effectively plan a conversion, you need to dig into your old system and identify that one obscure field on that one obscure table and figure out how it maps into the new PeopleSoft system. In some cases, it is very difficult, and at times impossible, to map all the codes and tables from your legacy system directly to PeopleSoft tables. In addition, you need to think about the impact that these legacy fields or codes will have on reports generated by the PeopleSoft system.
- Export your data, using an SQR or another method to interim tables.

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

- Import your data, using an SQR or PeopleSoft Import Manager.

  If you use the Import Manager, keep in mind that it completes edits as it loads data. This may or may not be desirable.

This section discusses:

- Mapping Data for Conversion.
- Preparing Data for Conversion.
- Verifying Converted Data.
- Using Data Dictionaries.
- Using Data Load Programs.
- Understanding Referential Integrity.
- Keeping Your Systems in Synch.
- Estimating Disk Usage Space.

See Also

PeopleTools: Data Management, "Import Manager"

Mapping Data for Conversion

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

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

Steps to accomplish data mapping.

1. Define each legacy data element.
2. Determine if the legacy data element is pertinent to the implementation scope.
3. Map the legacy data element to your PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions data element.
4. If the legacy data element cannot be mapped directly within your PeopleSoft Student Administration or PeopleSoft Contributor Relations Solutions application, determine if the legacy data should be tracked any more or if it could be tracked in another PeopleSoft application, such as PeopleSoft HRMS.
5. Reformat the legacy data to fit the PeopleSoft Student Administration Solutions field size, format, data type, and so on. If certain legacy data cannot be reformatted, indicate those as gaps in your gap analysis.

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

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

Preparing Data for Conversion

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

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

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

Another option to reduce the data clean up effort for the conversion team is to create reports for review by appropriate functional experts, technical experts, employees, and/or managers. These reports can be used for data verification and correction before the data is entered in the database. You should correct invalid legacy data first before preparing for conversion.

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

Verifying Converted Data

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

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

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

Using Data Dictionaries

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

Using Data Load Programs

After data preparation, you need to design conversion programs that extract the appropriate file layout in order to transfer the legacy data to PeopleSoft Student Administration and Contributor Relations Solutions tables.

Input Format

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

Conversion Program and Program Language

The conversion program will transfer the legacy data from the input format to PeopleSoft Student Administration and Contributor Relations Solutions tables, including reformatting, validating, and prompt table translating not encompassed in the data preparation program(s). The conversion program must include defaults for PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions record keys and required fields whenever legacy data has no data map.

The two most commonly used languages for conversions are COBOL and SQR. Other options include the PeopleSoft Import Utility and specific DBMS's import utility, if one exists—such as Oracle's SQL Loader. Determinants for making this decision include your skill set. For example, if you already know COBOL, there is no associated learning curve down time, or increased resources if you use COBOL. Regardless of your skill set, consider if it would be advantageous to learn a language that will likely be used in the future for PeopleSoft Student Administration and Contributor Relations Solutions modifications, conversion file size, level of translations and edits, and DBMS capability.

COBOL — Has a more robust debugger, can process a larger number of records faster, and is more widely recognized in the industry.

SQR — Is more commonly used in reporting and minor modifications. In most cases, SQR code can be written in less time than COBOL code.

PeopleSoft Import Utility — Performs PeopleCode edits on a flat file without modified programming but will take much more time. The PeopleSoft Import Utility is not recommended for tables with a large number of records to convert. This utility can, however, be used to test data cleanliness during the data preparation phase on a small subset of conversion data without being the actual data load method. This option provides a common method of verifying data for conversion preparation.

DBMS Import Utility — Requires the least conversion effort but is limited to no application-specific edits or translations.

Table Loading Sequence

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

Errors and Exception Handling

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

Totals Controls

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

Required Fields

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

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

Note. Refer to individual discussions regarding each application in this chapter for specific data conversion and data loading tips for applications within PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions.

Understanding Referential Integrity

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

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

Keeping Your Systems in Synch

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

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

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

Estimating Disk Usage Space

For PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions, PeopleSoft has done some preliminary research on the sizing of a production system. PeopleSoft realizes that the theoretical amount of disk space required by an application is different than the actual amount of disk space required by a database. The difference is due to comparing bytes with database blocks. For instance, if a particular table's average row length is 25 bytes and there are 1,000 rows in the table, theoretically the required amount of space is 25,000. However, if the database block size is 4K (4096), the number of database blocks required to hold the data will be 7 blocks or 28,673. Therefore, the actual amount of disk space required is greater than the theoretical. With this in mind and realizing that each installation may require a different block size, PeopleSoft states the size in theoretical terms.

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

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

Converting Recruiting and Admissions and Campus Community Data

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

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

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

Populating Tables for Recruiting and Admissions and Campus Community

Aside from address and other information, there are some tables that are precursors to all application conversions in PeopleSoft Student Administration Solutions and Contributor Relations Solutions. These tables represent the minimum to be converted. They should be populated in the order shown. These include:

Academic Organization Tables

Populate these tables in the order shown for academic organizations.

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

Level/Load and Term/Session Tables

Populate these tables in the order shown for level/load and term/sessions.

- LEVEL_LD_RULE_TBL
- ACAD_LEVEL_TBL
- ACAD_LOAD_TBL
- TERM_TBL

- TERM_VAL_TBL
- SESSION_TBL
- ACAD_CAL_TBL
- ACAD_CALTRM_TBL
- ACAD_CALSES_TBL

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

- PERSONAL_DATA
- PERS_DATA_EFFDT
- PERS_NAME_TYPE
- DISABILITY − required in order for PERS_DATA_EFFDT and PERSONAL_DATA to function properly
- DIVERSITY − required in order for PERS_DATA_EFFDT and PERSONAL_DATA to function properly
- NAMES
- ADDRESS_TYPE
- ADDRESSES - if you want to display/convert any address information, including those on PERSONAL_DATA.
- ADM_PRSPCT_CAR
- STDNT_CAREER
- ADM_APPL_DATA
- ADM_APPL_PROG
- GENL_MATERIALS - if you want to track materials already received for applications.
- EXT_ORG_TBL

Converting Financial Aid Data

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

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

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

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

See Also

Chapter 4, "Preparing for Data Conversion," Converting Student Financials Data, page 51

PeopleSoft 8 SP1 Financial Aid PeopleBook, "Setting Up Packaging Basics," Defining Financial Aid Item Types

Populating Tables for Financial Aid

At a minimum for PeopleSoft Financial Aid you have to convert the aggregate data for these tables:

- STDNT_AGGR_LIFE
- STDNT_AGGR_ALL
- STDNT_AGGR_SCHL

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

- Auto Packaging
- ISIR data
- Student Budget information
- Years of Award Activity
- Loan History
- Work-study History
- Checklists for documents already received

Converting Student Records Data

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

This section lists prerequisites and discusses:

- Populating tables for Student Records.
- Converting enrollment data.

See Also

Chapter 4, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 46

Prerequisites

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

Populating Tables for Student Records

At a minimum for PeopleSoft Student Records, you need to set up the following tables in the sequence they are listed.

For the Course Catalog and Schedule of Classes there is PeopleCode behind the COURSE_ID field to increment a new Course ID by 1. To mimic what this PeopleCode does, your conversion program needs to do the +1 logic. You can manually set the next available Course ID in the installation table for PeopleSoft Student Administration Solutions. You should update the Last Course ID Assigned in the Installation Table so that you do not have collisions between the Course IDs assigned by your conversion and Course IDs manually created later.

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

Course Catalog Tables

Populate these tables for the course catalog.

- CRSE_CATALOG
- CRSE_COMPONENT
- CRSE_OFFER

Schedule of Classes Tables

Populate these tables for the schedule of classes.

- CLASS_TBL
- CLASS_ASSOC
- CLASS_COMPONENT

Student Careers & Plans

Populate these tables for student careers and plans.

- STDNT_CAREER
- STDNT_CAR_SEQ
- ACAD_PROG
- ACAD_PLAN

Student Degrees

Populate these tables for student degrees.

- DEGREE_TBL (populate this table manually)

- ACAD_DEGREE
- ACAD_DEGR_HON
- ACAD_DEGR_PLAN
- ACAD_DEGR_SPLN

Grades

Populate these tables manually for grades.

- GRADING_SCHEME_TBL
- GRADE_BASIS_TBL
- GRADE_TBL

Student Term Data

Populate these tables for student term data.

- STDNT_CAR_TERM
- ENRL_REQ_HEADER
- ENRL_REQ_DETAIL

See Also

Chapter 5, "Reviewing Your Installation Setup and System Defaults," Selecting General Installation Options, page 57

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up the Course Catalog"

Converting Enrollment Data

There are three options to select for converting student enrollment data. Each of them is reviewed here. It is important to note that when you convert enrollment data you must create Enrollment Request input transactions and engage the enrollment COBOL engine to actually post the enrollments. This is the only way that the statistics on the STDNT_CAR_TERM table will automatically be calculated.

Options for converting your enrollment data are:

1. Convert the data as normal student enrollment data.

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

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

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

3. Use the Historical Course Enrollment page and convert statistics in summary using the transfer credit engine.

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Using Enrollment Related Processes," Creating Historical Enrollment Records

Converting Student Financials Data

PeopleSoft Student Financials is the receiver of data from many of the other PeopleSoft Student Administration and Contributor Relations Solutions applications. For this reason, you must set up parts of other applications before you can convert your student financial information.

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

Prerequisites

You must convert the personal data tables and external organizations data listed in the Converting Recruiting and Admissions and Campus Community Data section before you convert student financials data.

See Also

Chapter 4, "Preparing for Data Conversion," Converting Recruiting and Admissions and Campus Community Data, page 46

Populating Tables for Student Financials

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

- General Ledger

  Make sure that the General Ledger (GL) information is set up on the Item Type Table. You have the option of converting your data and running a GL interface in order to set the GL fields or you can convert the fields as having already been sent to your GL.

- PeopleSoft Financial Aid

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

- Payment Plans

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

- Posting

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

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

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

- Tuition Charges

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

Converting Contributor Relations Data

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

This section discusses how to:

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

Populating Tables for Contributor Relations

At a minimum for PeopleSoft Contributor Relations Solutions, you need to set up the following tables.

Organization Structure Tables

Populate these tables for organization structure.

- INSTITUTION_TBL
- CAMPUS_TBL
- DEPARTMENT_TBL
- AV_BUS_UNIT_TBL

PeopleSoft Campus Community and Constituent Tables

Populate these tables for PeopleSoft Campus Community and constituent data.

- PERSONAL_DATA
- PERS_DATA_EFFDT
- PERS_NAME_TYPE
- DISABILITY -- required in order for PERS_DATA_EFFDT and PERSONAL_DATA to function properly
- DIVERSITY-- required in order for PERS_DATA_EFFDT and PERSONAL_DATA to function properly
- NAMES
- ADDRESS_TYPE
- ADDRESSES -- if you want to display/convert any address information, including those on PERSONAL_DATA
- EXT_ORG_TBL
- AV_CNST_TYP_TBL
- AV_LEGACY_DEG -- provided to convert alumni degree records if you do not want to create all previously existing academic structures in the student records tables. Otherwise, all of the Student Careers & Plans and Student Degrees tables listed in the Converting Student Records Data section are required for tracking academic data

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

Gift tables

Populate these tables for gifts.

- AV_SESSION_TBL - Required
- AV_BTCH_TOT - Required
- AV_GIFT_DTL - Required
- AV_DESIGNATION - Required
- AV_RECOGNITION - Required
- AV_RCG_DES - Required
- AV_MTCH_GIFT - Optional
- AV_TRIBUTE_DTL - Optional (Honor Of or In Memory Of)
- AV_TRIBUTE_NTFY - Optional

Pledge tables

Populate these tables for pledge data.

- AV_SESSION_TBL - Required
- AV_BTCH_TOT - Required
- AV_PLEDGE_DTL - Required
- AV_DESIGNATION - Required
- AV_RECOGNITION - Required
- AV_RCG_DES - Required
- AV_PLDG_SCHD - Required for Active Pledges but Optional for Complete Pledges
- AV_TRIBUTE_DTL - Optional (Honor Of or In Memory Of)
- AV_TRIBUTE_NTFY - Optional
- AV_SESSION_TBL

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

- AV_GIFT_DTL

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

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

- AV_DESIGNATION

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

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

- AV_RECOGNITION

  Populate all key fields, plus all other fields you can populate. RCG_PCT_AMT & RCG_APPLIED should be mapped to gift amount (if there is only one recognition per gift). RECOGNITION_TYPE = 'H' for Hard Credit. For Soft Credit, there are different types of Soft Credit (such as Vehicle Credit) that will be defined by your institution. No soft credit values are delivered. RECOGNITION_TYPE is a setup value with 'H' being a delivered, required value. (See following notes.)

- AV_RCG_DES

  Populate all key fields, plus all other fields you can populate. RCG_DES_AMT & CHARITABLE_AMT should be mapped to gift amount (if there is only one recognition/ designation per gift). For Soft Credit CHARITABLE_AMT = '0'. (See following notes.)

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

Creating the Accumulated Records for Gift and Pledge Inquiry

In PeopleSoft Contributor Relations Solutions, the Giving Profile and Commitment Summary online reports are run based on summary accumulator records rather than detailed transaction records. For the proper information to appear on these reports, you must initialize the summary accumulator records for all constituents and all gifts and pledges in the system. Contributor Relations delivers a Constituent Accumulator Initialization process to perform this task. To access the process, go to Design Student Administration, Define Contributor Relations, Process, Accumulator Initialization. Once initialized, incremental accumulations take place for affected constituents during the Constituent Accumulator process. You can run this process either by itself or along with the GL Interface job.

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

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

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

See Also

Chapter 20, “Setting User Defaults,” page 271

PeopleTools: Application Engine

CHAPTER 5

Reviewing Your Installation Setup and System Defaults

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

- Select general installation options.
- Review incremental numbering in your system.
- Set up primary permission list preferences.

Understanding Installation Setup and System Defaults

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

Selecting General Installation Options

In the Installation Table component there are two pages that are important when setting up PeopleSoft Student Administration and Contributor Relations Solutions. You use the first page, Products, to select which PeopleSoft applications you have installed on your system. You may need to update this table as you add new applications to your system. You use the second page, SA Options, to set system-wide options for names, addresses and other items for PeopleSoft Student Administration and Contributor Relations Solutions.

This section discusses how to:

- Select your installed applications.
- Set up names, addresses and other items.

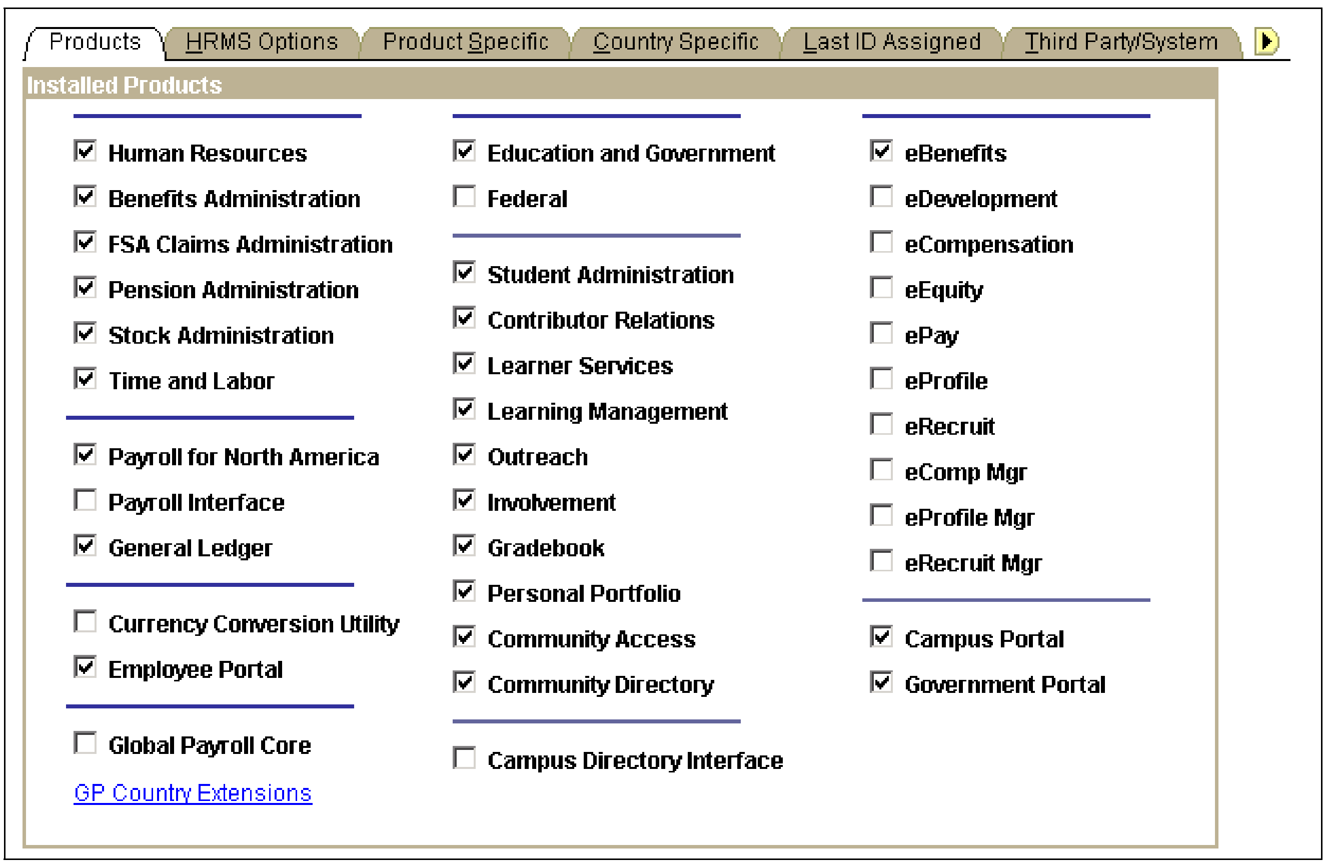
Note. Only the pages that are relevant for PeopleSoft Student Administration and Contributor Relations Solutions are described here. For information on the other pages in this component, see your PeopleSoft Human Resources Management System documentation.

Pages Used to Select General Installation Options

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Define Business Rules, Define General Options, Setup, Installation Table, Products	Allows you to select which PeopleSoft applications and application parameters are installed on your system. Be sure the settings on this page are accurate before using your Student Administration and Contributor Relations Solutions system.
SA Options (student administration options)	INSTALLATION_LS	Define Business Rules, Define General Options, Setup, Installation Table, SA Options	Set up name and address types and other items you use throughout your system.

Selecting Your Installed Applications

Access the Products page.



Products page

Select the Education and Government check box for all PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions installations.

If your institution has installed only the Student Administration application, then the Human Resources check box should be cleared and the Student Administration check box should be selected. If Human Resources is selected but that application is not installed, values set to auto display in your Student Administration system might not display and you could get random error messages as you navigate through your system.

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

If your institution has installed both the Human Resources Management System (HRMS) and Student Administration applications, then both the Human Resources and Student Administration check boxes should be selected. If you have both applications, you will probably want to review the other settings to determine if they are set properly for HRMS.

The following items are collaborative applications that you purchase separately and are used with the Student Administration and Contributor Relations applications.

- Learner Services
- Learning Management
- Outreach
- Involvement
- Gradebook
- Personal Portfolio
- Community Access
- Community Directory

If you have installed any of these collaborative applications, you should select the appropriate check box.

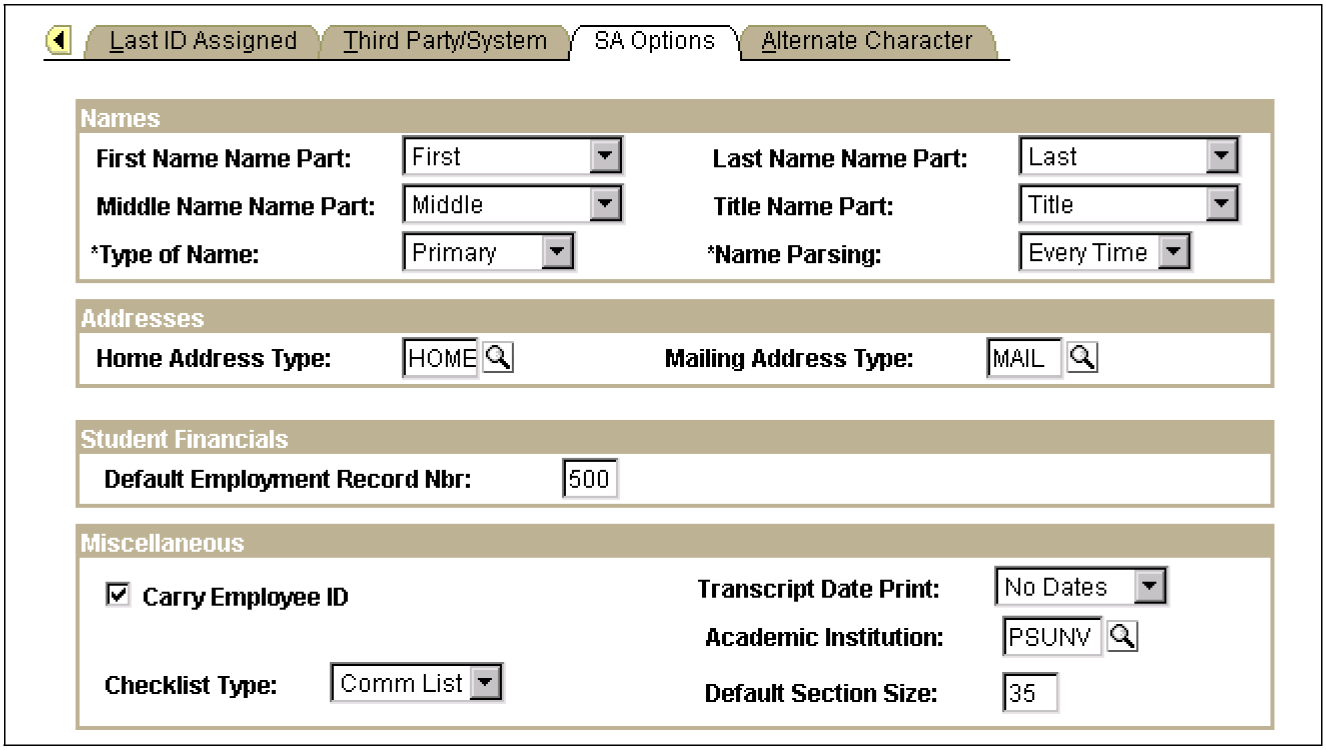
Note. When both PeopleSoft HRMS and PeopleSoft Student Administration Solutions applications are installed, the Student Administration functions take precedence over HRMS. That is, where the two applications have similar features or the same tables, your system will point to the Student Administration features or tables first.

See Also

PeopleSoft Human Resources Management System documentation

Setting Up Names, Addresses and Other Items

Access the SA Options page.



SA Options page

For all of the name parts you can select these values: *First, Full, Last, Middle,* or *Title.*

First Name Name Part

This value is used to map the name part to certain fields on the NAMES table that are used in Name Usage and Joint Salutation usage.

Middle Name Name Part

This value is used to map the name part to certain fields on the NAMES table that are used in Name Usage and Joint Salutation usage.

Type of Name

This is the value that writes to the NAMEGBL_NPC_SBR subrecord on PERSONAL_DATA and the NAMEGBL_SBR on PERS_DATA_EFFDT.

Last Name Name Part

This value is used to map the name part to certain fields on the NAMES table that are used in Name Usage and Joint Salutation usage.

Title Name Part

This value is used to map the name part to certain fields on the NAMES table that are used in Name Usage and Joint Salutation usage.

Name Parsing

This field indicates how frequently your institution wants the system to parse all other name types according to the values set on the NAME_PARSE_TBL (that is, other than the predefined default name type set previously). Options are:

Every Time: Every time a name change occurs, parsing will be replicated across all name types.

Init Entry (initial entry): Parsing will be replicated only on the initial entry of a name.

No Parsing: Replication of parsing will not occur.

Home Address Type Select the address type you want the system to use for the home address. This is the value that writes to the ADDRESS_SBR subrecord on PERSONAL_DATA and that is used as the Home address in HRMS.

Mailing Address Type Select the address type you want the system to use for the mailing address. This is the value that writes to the ADDR_OTR_SBR subrecord on PERSONAL_DATA and that is used as the Mailing address in HRMS.

Note. Home Address Type, Mailing Address Type, and Type of Name are the types used to synchronize data between PERSONAL_DATA and these “type based” records (NAMES, ADDRESSES). These are frequently referred to as the “magic types.”

Default Employment Record Nbr (default employment record number) Enter an appropriate value that is different from the ones used in the system by HRMS Payroll. This field is used when the PeopleSoft Student Financials Refunding feature uses PeopleSoft Payroll to cut refund checks. In order to use payroll to refund money to a student, the student must have JOB and TAX records populated in the payroll system. In order to differentiate the student’s Student Financials JOB and TAX records from the HRMS Payroll records, an employment record number is used that defaults from this field.

This field allows you to maintain multiple jobs for a person and PeopleSoft Student Financials uses one of the jobs (identified by this default employment record number) for running payroll (refund) checks.

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

Checklist Type Select the checklist type that you want to set as the default or most frequently used checklist. When you assign a checklist to an individual, this is the checklist the system will assign unless you select a different checklist at that time.

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

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

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

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

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

Academic Institution Select an academic institution that you want to use as a default throughout your system.

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

Selecting Country Specific Information

PeopleSoft Student Administration and Contributor Relations Solutions support United States and Canadian specific demographic data. The country specific fields are added in collapsible sections. You select which collapsible sections you want to be visible in your system on the Installed Countries page. Once you have selected the countries you want, the collapsible section associated with these countries appears in the different pages where they have been added. Notice that turning on the countries shows all the collapsible sections created for these courntries throughout the applicaiton.

This sections discussed how to:

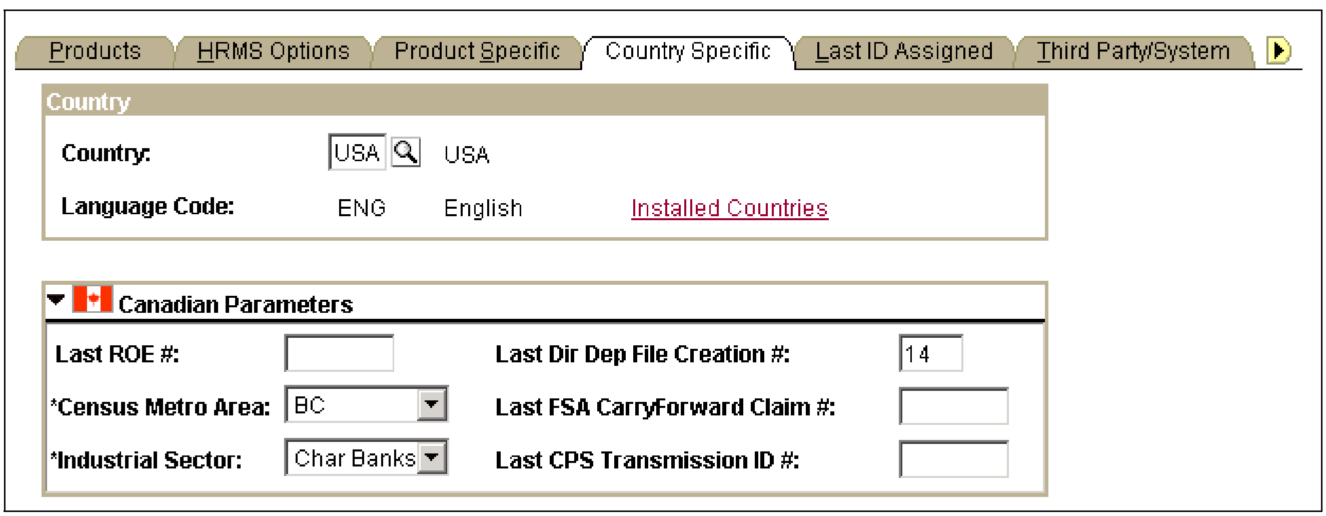
- Enter country specific information.
- Select country specific functionality.

Pages Used to Select Country Specific Information

Page Name	Object Name	Navigation	Usage
Country Specific	INSTALLATION_TBL3	Define Business Rules, Define General Optons, Setup, Installation Table, Country Specific	Enter country specific installation information.
Installation Countries	INSTALLATION_SEC	Click the Installed Countries link on the Country Specific page.	Select countries specific functionality to active for users.

Entering Country Specific Information

Access the Country Specific page.



Country Specific page

Use the Installed Countries link to access the Installed Countries page where you can select which country specific collapsible sections you want displayed in your system.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook: "Setting Up Control Tables"

Selecting Country Specific Functionality

Access the Installed Countries page.

Installed Countries page

The system displays a flag for each country that has special local functionality in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions. Select a check box to activate local functionality for that country. Users can see and work with that country's local functionality. Clear a check box to hide that local functionality from your users

Reviewing Incremental Numbering

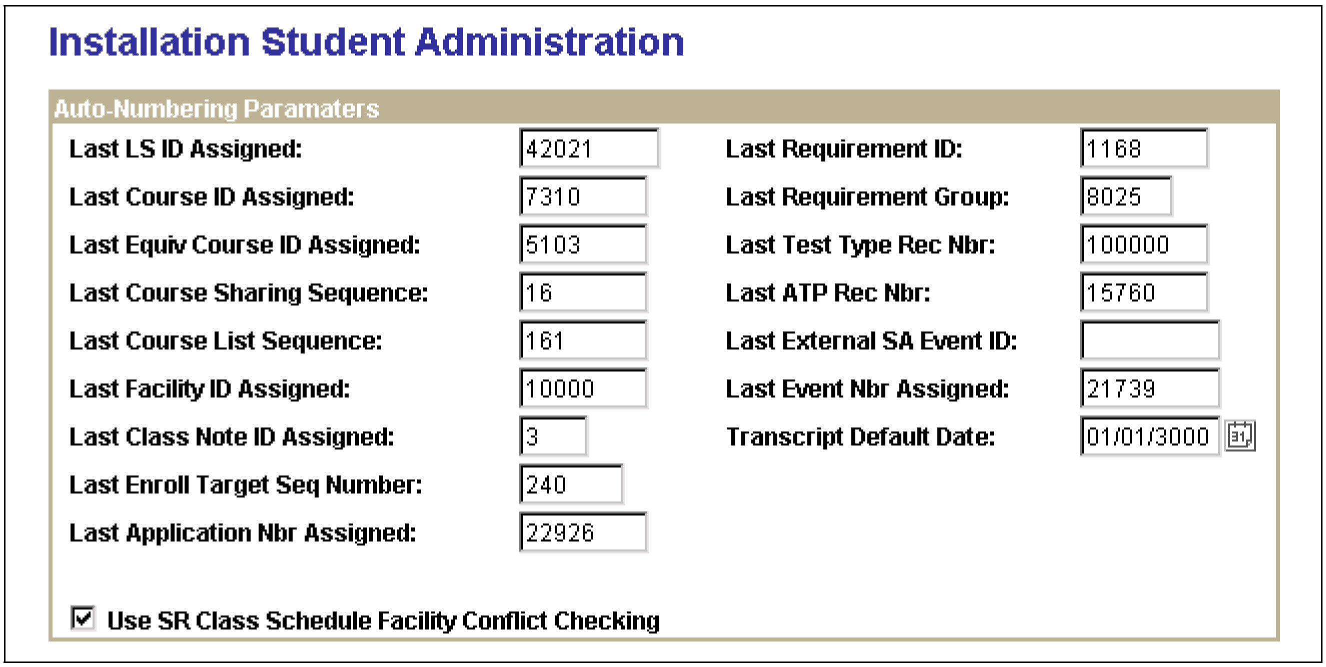
Each of the fields on this Installation Student Administration page is a field that is automatically incremented or defaulted throughout the system, such as Course ID, EmplID, As of Date, and so on. You need to set the last used numbers so automatic numbering will not create numbers that already exist in your data.

Page Used to Review Incremental Numbering

Page Name	Object Name	Navigation	Usage
Installation Student Administration	INSTALLATION_SA	Design Student Administration, Define Student Administration, Setup, Installation Student Admin, Installation Student Admin	Set or review incremental numbering for items throughout the system.

Setting Up Incremental Numbering

Access the Installation Student Administration page.



Installation Student Administration page

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

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

Last LS ID Assigned (last learning solutions ID assigned)

The automatic sequential assignment of IDs for individuals and IDs for organizations is based on this field. You can change the value of this field if your institution needs to use a different numbering scheme, however PeopleSoft recommends that you use the automated numbering assignment. Used by various applications.

Note. This field accepts a length of up to 11 characters, however PeopleCode shipped with PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions limits the ID length to a maximum of seven characters. If you increase the length of the ID field you increase the number of leading zeros for the ID. For example, at the default 7-character length, the ID is 0000001 whereas at a character length of 11, the ID is 00000000001. This is specific to IDs in PeopleSoft Student Administration Solutions, PeopleSoft Contributor RelationsSolutions, and PeopleSoft Human Resources, when you have PeopleSoft Student Administration installed with HR.

Last Course ID Assigned	Used by PeopleSoft Student Records.
Last Equiv Course ID Assigned (last equivalent course ID)	Used by PeopleSoft Student Records.
Last Course Sharing Sequence	Used by PeopleSoft Academic Advisement.
Last Course List Sequence	Used by PeopleSoft Student Records.
Last Facility ID Assigned	Use if you want to enable the system to default an auto incremental Facility ID number each time you create a new facility on the Facility Table setup page. If you do NOT want to use auto incremental numbering, you will be required to enter a value for Facility ID when adding a new Facility. Used by various applications.
Last Class Note ID Assigned	Used by PeopleSoft Student Records.
Last Enroll Target Seq Number (last enrollment target sequence number)	Used by PeopleSoft Student Records and PeopleSoft Recruiting and Admissions for Enrollment Management Enrollment Targets.
Last Application Nbr Assigned (last application number assigned)	Used by PeopleSoft Recruiting and Admissions.
Use SR Class Schedule Facility Conflict Checking	Select this check box to enable facility conflict checking when scheduling classes. Used by PeopleSoft Student Records.
Last Requirement ID	Used by PeopleSoft Student Records and PeopleSoft Academic Advisement.
Last Requirement Group	Used by PeopleSoft Student Records and PeopleSoft Academic Advisement.
Last Test Type Rec Nbr (last test type record number)	Used in processing suspense records for data loads. Used by PeopleSoft Recruiting and Admissions.
Last ATP Rec Nbr (last ATP record number)	If you set this field to 50,000, next time you run the ATP process, each school loaded will have a number assigned starting from 50,000. This field is not connected to your institution's unique ATP Code. Used by PeopleSoft Campus Community and PeopleSoft Recruiting and Admissions.

Last External SA Event ID (last external student administration event ID)	Used by various applications, including PeopleSoft Contributor Relations Solutions.
Last Event Nbr Assigned (last event number assigned)	Used by various applications, including PeopleSoft Contributor Relations Solutions.
Transcript Default Date	This is the default date used for processing academic advisement degree audit reports. To set the default to the current date, leave this field blank. Used by PeopleSoft Academic Advising.

Setting Up Primary Permission List Preferences

Use the Primary Permission List Table to set predefined TableSet Sharing and system-wide defaults and settings for each of your primary permission lists. The system defaults in the values you indicate for a particular permission list on the Primary Permission List Preferences Table, such as Business Unit, SetID, Currency, Country, and/or Company Code, when a user associated with that permission list logs into PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions. You can tailor your PeopleSoft Student Administration and PeopleSoft Contributor Relations Solutions systems for each of your users, controlling the default values that users see on pages in the system.

Setting up primary permission lists is needed when using the User Profiles Management process when you give user IDs access to pages. It is also used for the New Users Registration functionality to give your visitors access to some pages in your system.

This section discusses how to:

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

See Also

Chapter 17, "Creating and Maintaining User Profiles," page 241

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Using PeopleSoft Community Access Collaborative Application," Understanding Self-Service New User Registration

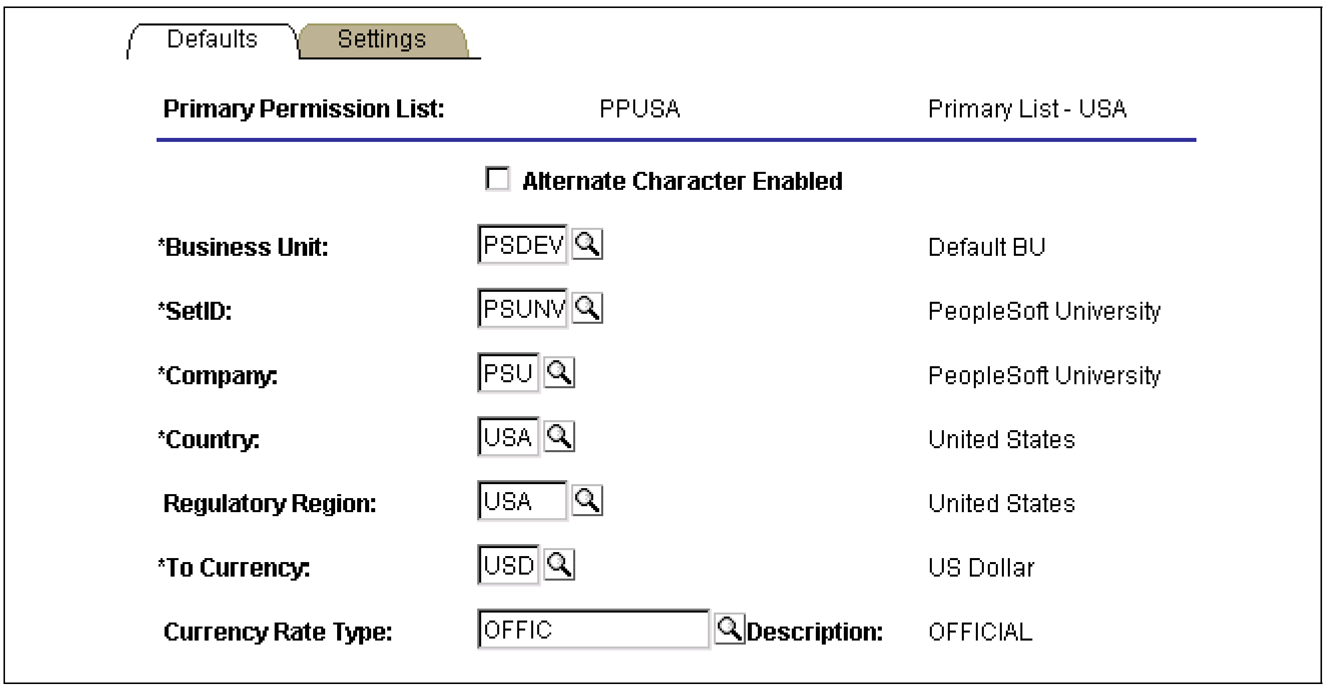
PeopleTools: Security

Pages Used to Set Up Primary Permission List Preferences

Page Name	Object Name	Navigation	Usage
Primary PrmList Preferences – Defaults	OPR_DEF_TBL_HR	Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Defaults	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Primary PrmList Preferences – Settings	OPR_DEF_TBL_HR2	Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Settings	Set the system-wide default settings for each of your permission lists. Using this page you can tailor your system for each of your permission lists, controlling the default values that users see on pages in the system.

Setting Permission List Defaults

Access the Primary PrmList Preferences – Defaults page.



Primary PrmList Preferences – Defaults page

Note. These defaults override the defaults you set for these options on the Installation Table for this permission list.

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

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

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

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

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

Company Enter the default company for this permission list.

Country Enter the default country for this permission list.

Regulatory Region This field is not used in PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions. See your PeopleSoft HMRS documentation.

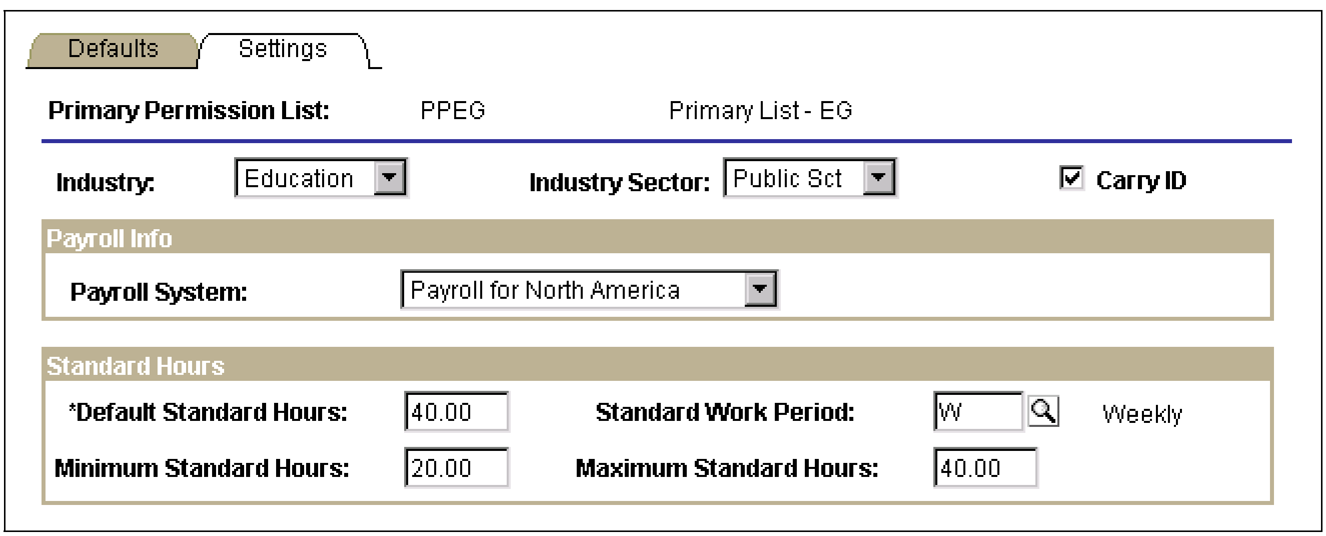
To Currency Select a currency to act as default values for this permission list in PeopleSoft Student Administration and PeopleSoft Contributor Relations Solutions.

Currency Rate Type Select a currency rate type to act as a default value for this permission list in PeopleSoft Student Administration and Contributor Relations Solutions.

Description The description of the currency rate type.

Setting Industry Sector and Payroll Information

Access the Primary PrmList Preferences – Settings page.



Primary PrmList Preferences – Settings page

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

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

Carry ID Select this check box to carry an ID of the last individual or organization you enter or select from search box to search box and page to page. With

Carry ID, you do not have to reenter or reselect the ID each time if you want to continue editing or reviewing data for the same individual.

See Also

PeopleSoft Human Resources Management System documentation

CHAPTER 6

Designing Your Academic Structure

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

This chapter discusses the key table setup that is necessary to design an academic structure for your institution, provide an explanation of how to:

- Define academic institutions
- Set up campuses
- Define academic careers
- Create career pointer exception rules
- Define academic organizations
- Establish fields of study
- Modify CIP and HEGIS codes
- Define subject areas

Defining Academic Institutions

Use the Academic Institution Table component to define academic institutions. An academic institution is an entity, such as a university or college, which runs independently from other like entities and has its own set of rules and business processes. Typically, you define just one academic institution, but you can define as many as you need. Throughout PeopleSoft Student Administration and Contributor Relations Solutions, you use academic institutions as a key value to group data into tables and search against those tables to extract data. Within the Academic Institution Table component, you can define the name, address, and effective date of your academic institutions and set the highest level defaults for various processes.

This section lists prerequisites and discusses how to:

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

Prerequisites

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

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

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

Also, before establishing academic institutions, define the following:

- SetIDs

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

  Grading schemes are the rules that your academic institution uses for assigning and converting grades.
- Country codes

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

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, “Completing PeopleSoft Student Financials General Setup,” Understanding Business Units

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Designing PeopleSoft Campus Community”

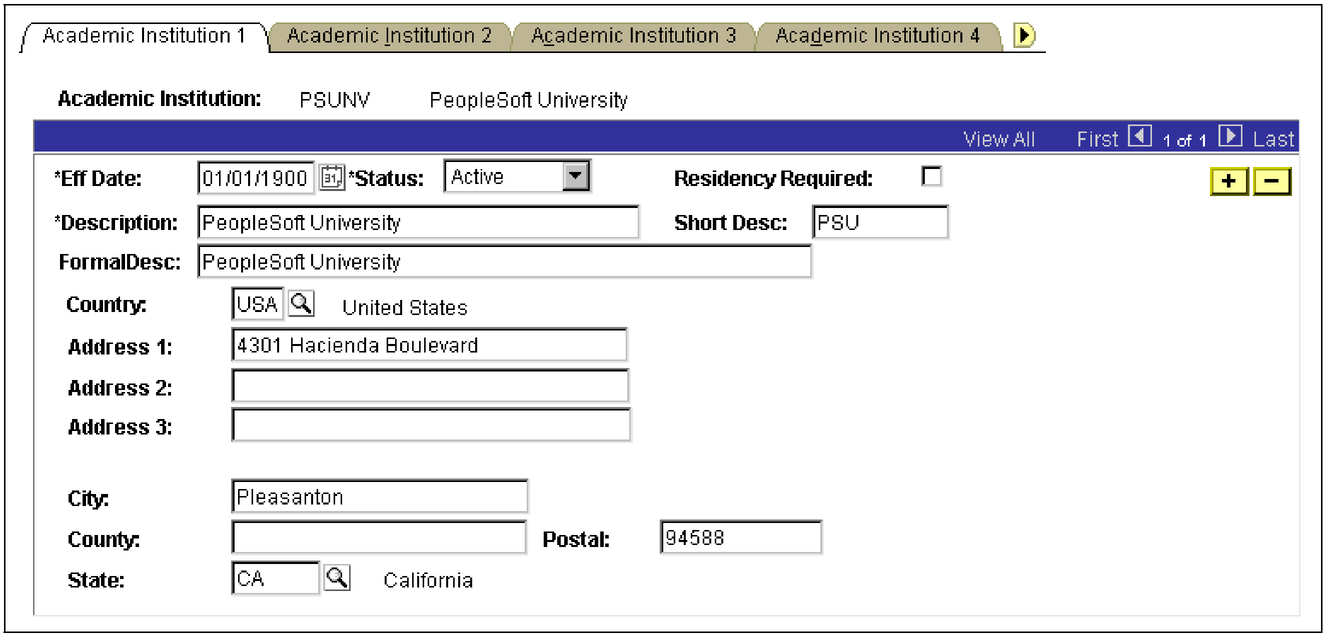
PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Grading,” Defining Grading Schemes

Pages Used to Define Academic Institutions

Page Name	Object Name	Navigation	Usage
Academic Institution 1	INSTITUTION_TABLE	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 1	Define the name and location of your academic institutions.
Academic Institution	INSTITUTION_TABLE1	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 2	Set academic institution defaults for transfer credit processing and for courses.
Academic Institution 3	INSTITUTION_TABLE3	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 3	Set additional academic institution defaults and options for attendance tracking, cohort reporting, National Student Loan Clearinghouse (NSLC) reporting, and interoperability for learning management systems (LMS).
Academic Institution 4	INSTITUTION_TABLE4	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 4	Activate the Instructor Workload feature and establish high level limits, workload preferences, and default values for instructor workload at your institution.
Academic Institution 5	INSTITUTION_TABLE5	Design Student Administration, Design Academic Structure, Setup, Academic Institution Table, Academic Institution 5	Set repeat checking controls for academic institutions. The academic institution level is the highest level of control for the automatic Repeat Rule Checking process (SRPCERPT).

Defining the Name and Location of Academic Institutions

Access the Academic Institution 1 page.



Academic Institution 1 page

Residency Required

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

Country

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

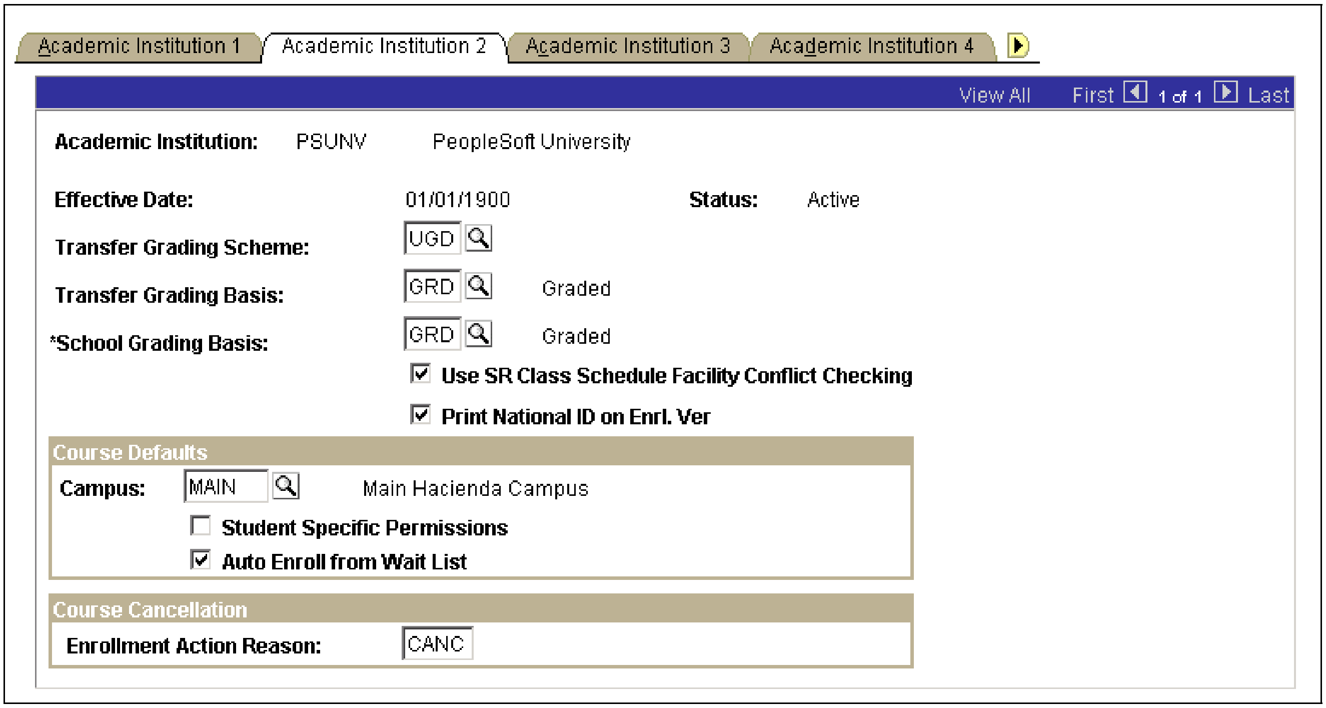
See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Setting Up Identification Data," Setting Up Residency Rules

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Identification Data," Entering Residency Data

Setting Academic Institution Defaults

Access the Academic Institution 2 page.



Academic Institution 2 page

Transfer Grading Scheme

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

Transfer Grading Basis

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

School Grading Basis

Currently not in use.

Use SR Class Schedule Facility Conflict Checking

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

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

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

Print National ID on Enrl. Ver (print national ID on enrollment verification)

Select to have the system display the student's national ID on the enrollment verification report. The system selects this check box by default.

Course Defaults

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

Campus Select the default campus for all courses within this academic institution. The campus value defaults to the course catalog and the schedule of classes.

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

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

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

Course Cancellation

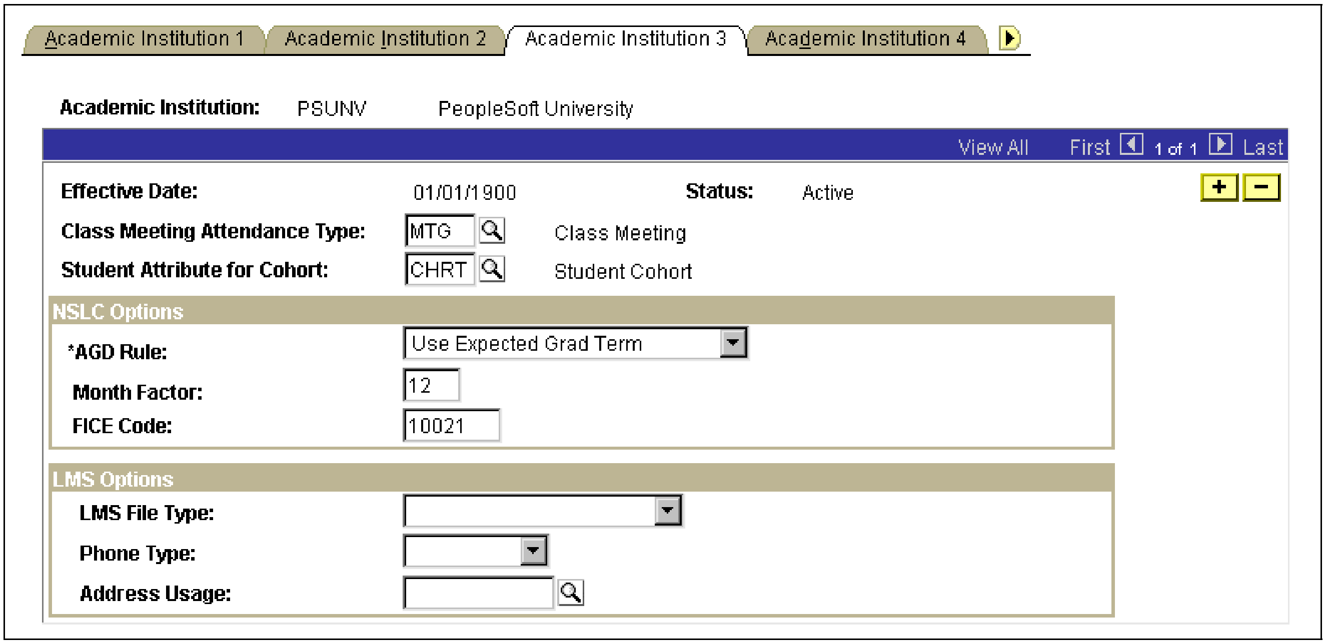
Enrollment Action Reason Enter the default enrollment action reason that the system posts to enrolled students' records whenever a class is cancelled.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

Setting Additional Institution Defaults and Options

Access the Academic Institution 3 page.



Academic Institution 3 page

Setting Attendance and Cohort Defaults

Class Meeting Attendance Type

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

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

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

Student Attribute for Cohort

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

Setting NSLC Options

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

AGD Rule (anticipated graduation date rule)

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

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

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

Month Factor

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

FICE Code (Federal Interagency Committee on Education code)

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

Setting LMS Options

Use the LMS Options group box to specify LMS (learning management systems) file type default values and personal data extract parameters.

LMS File Type

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

Phone Type, Address Usage

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Tracking Attendance”

PeopleSoft 8 SP1 Student Records PeopleBook, “Consolidating and Reporting Academic Statistics”

PeopleSoft 8 SP1 Student Records PeopleBook, “Managing Interoperability for Learning Management Systems”

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data”

Activating Set Instructor Workload

Access the Academic Institution 4 page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data”

Setting Repeat Checking Controls

Access the Academic Institution 5 page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Performing Repeat Checking”

Setting Up Campuses

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

This section lists prerequisites and discusses how to define campuses.

Prerequisites

Before you establish campuses, define the following:

- Establishment IDs

- In PeopleSoft Human Resources, use the Location Table component to define work locations, but you also use the Location Table component to define general campus locations within PeopleSoft Student Administration and Contributor Relations Solutions.

  These campus locations are synonymous with central locations or addresses for the various campuses that comprise a college or university. If you have one main campus, you probably have a single location. However, if you offer classes in satellite locations, or if you have geographically separate entities that make up your institution, you must define multiple locations.

- To add locations in PeopleSoft Student Administration and Contributor Relations Solutions, you must create at least one establishment value.

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

• Locations

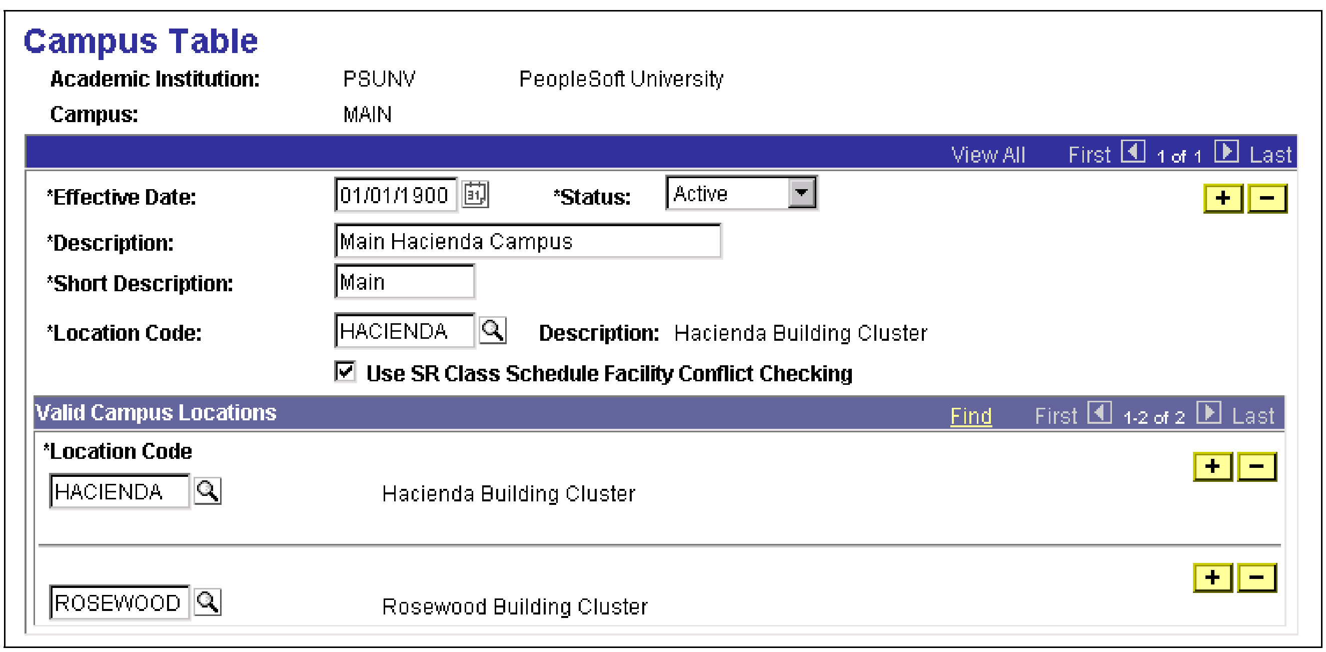
You define the physical locations of the campuses at your institution on the Location Table page. Each location requires an establishment ID.

Page Used to Set Up Campuses

Page Name	Object Name	Navigation	Usage
Campus Table	CAMPUS_TABLE	Design Student Administration, Design Academic Structure, Setup, Campus Table	Define each campus that constitutes your academic institution and indicate which locations are valid for a particular campus.

Defining Campuses

Access the Campus Table page.



Campus Table page

Use SR Class Schedule Facility Conflict Checking

Select to enable the system to use internal facility-conflict-checking functionality for this campus. The system checks for facility conflicts whenever a facility is booked for a class on the Meetings page or the Exam page of the schedule of classes.

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

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

Location Code (upper)

Select a location code for the primary location of the campus. Define locations on the Location Table page in PeopleSoft Human Resources.

Location Code (lower)

In the Valid Campus Locations group box, select all valid location codes for this campus. When creating courses or scheduling classes at a particular campus, the system prompts you with only the valid values that you list here.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Defining Facilities and Rooms

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Designing PeopleSoft Campus Community," Setting Up PeopleSoft Campus Community/HRMS Shared Elements

Defining Academic Careers

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

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

Understanding Academic Careers

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

Academic careers have the following common characteristics:

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

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

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Preparing to Consolidate and Report Academic Statistics,” Setting Up Academic Careers and Academic Programs for Reporting

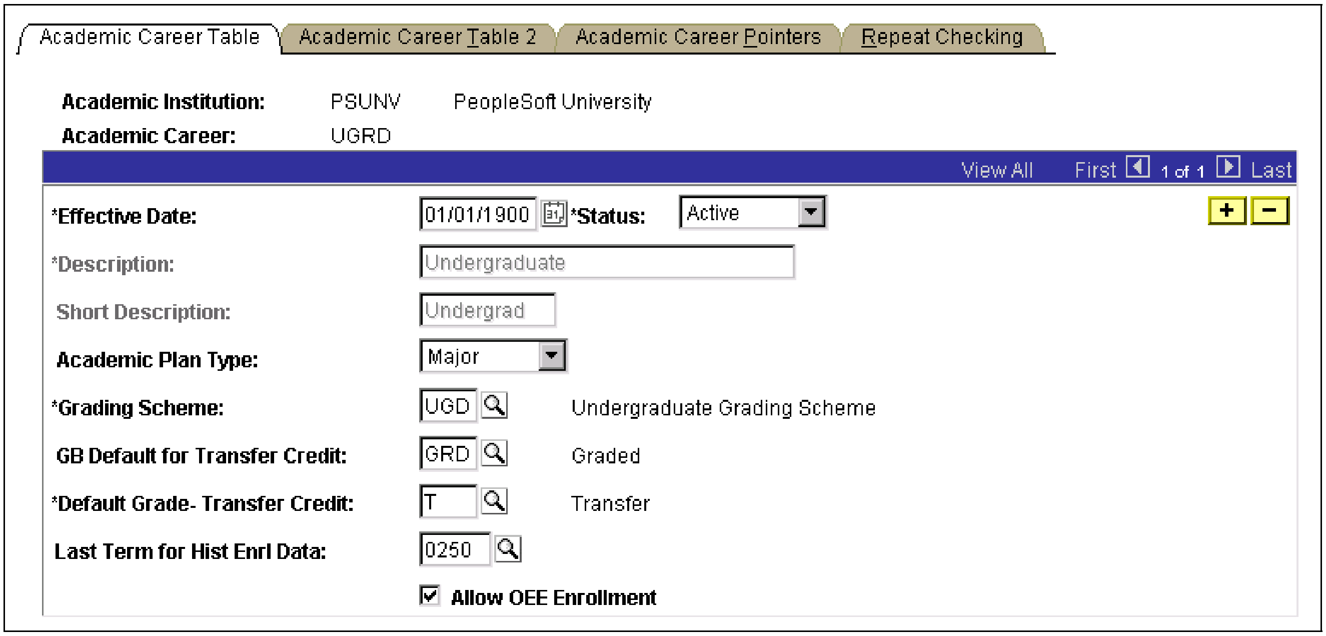
PeopleSoft 8 SP1 Student Records PeopleBook, “Consolidating and Reporting Academic Statistics,” Understanding Consolidating and Reporting Academic Statistics

Pages Used to Define Academic Careers

Page Name	Object Name	Navigation	Usage
Academic Career Table	ACAD_CAREER_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Career Table, Academic Career Table	Describe your academic careers and set parameters for each academic career, such as grading scheme.
Academic Career Table 2	ACAD_CAREER_TBL2	Design Student Administration, Design Academic Structure, Setup, Academic Career Table, Academic Career Table 2	Set additional academic career parameters such as default term unit types.
Academic Career Pointers	ACAD_CAR_PTRS	Design Student Administration, Design Academic Structure, Setup, Academic Career Table, Academic Career Pointers	Set up academic career pointers, which specify whether a student within an academic career can enroll in courses from another academic career at a particular academic institution.
Repeat Checking	ACAD_CAR_RPT_CHK	Design Student Administration, Design Academic Structure, Setup, Academic Career Table, Repeat Checking	Set repeat checking controls at the academic career level. Also link a repeat rule to an academic career.

Describing Academic Career Parameters

Access the Academic Career Table page.



Academic Career Table page

Academic Plan Type

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

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

Grading Scheme

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

GB Default for Transfer Credit (grading basis default for transfer credit)

Select the default-grading basis for credit transferred to this academic career. This grading basis appears by default on the Program 1 page, where you can override the value for academic programs within this academic career.

Default Grade-Transfer Credit

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

Last Term for Historical Enrl Data (last term for historical enrollment data)	Select the last term for historical enrollment data. The system uses this value in conjunction with the values entered for a student on the Historical Course Enrollment page to determine which historical enrollment information gets printed on a student's transcript. This field restricts historical enrollment data to terms less than or equal to the value that you specify. Therefore, set this field value to the latest term possible for historical enrollment records. You can include historical enrollment on transcripts by selecting the corresponding option on the Enrollment/Statistics page of the Transcript Type component. ***Warning!*** The system populates the Last Term for Historical Enrollment Data field with *0000.* However, term *0000* does not allow historical enrollment data to appear on a transcript. If you want historical enrollment data to appear on a student's transcript, you must select another term value.
Allow OEE Enrollment (allow open entry/exit enrollment)	Select to have all course offerings that you tie to this academic career permit, by default, the scheduling of open entry/exit (OEE) class sections. You can override this default on an offering-by-offering basis on the Offerings page of the Course Catalog component. If you select this check box, the OEE Dynamic Date Rule field on the Academic Career Table 2 page also becomes available.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, "Getting Started With PeopleSoft Student Financials"

Chapter 4, "Preparing for Data Conversion," page 39

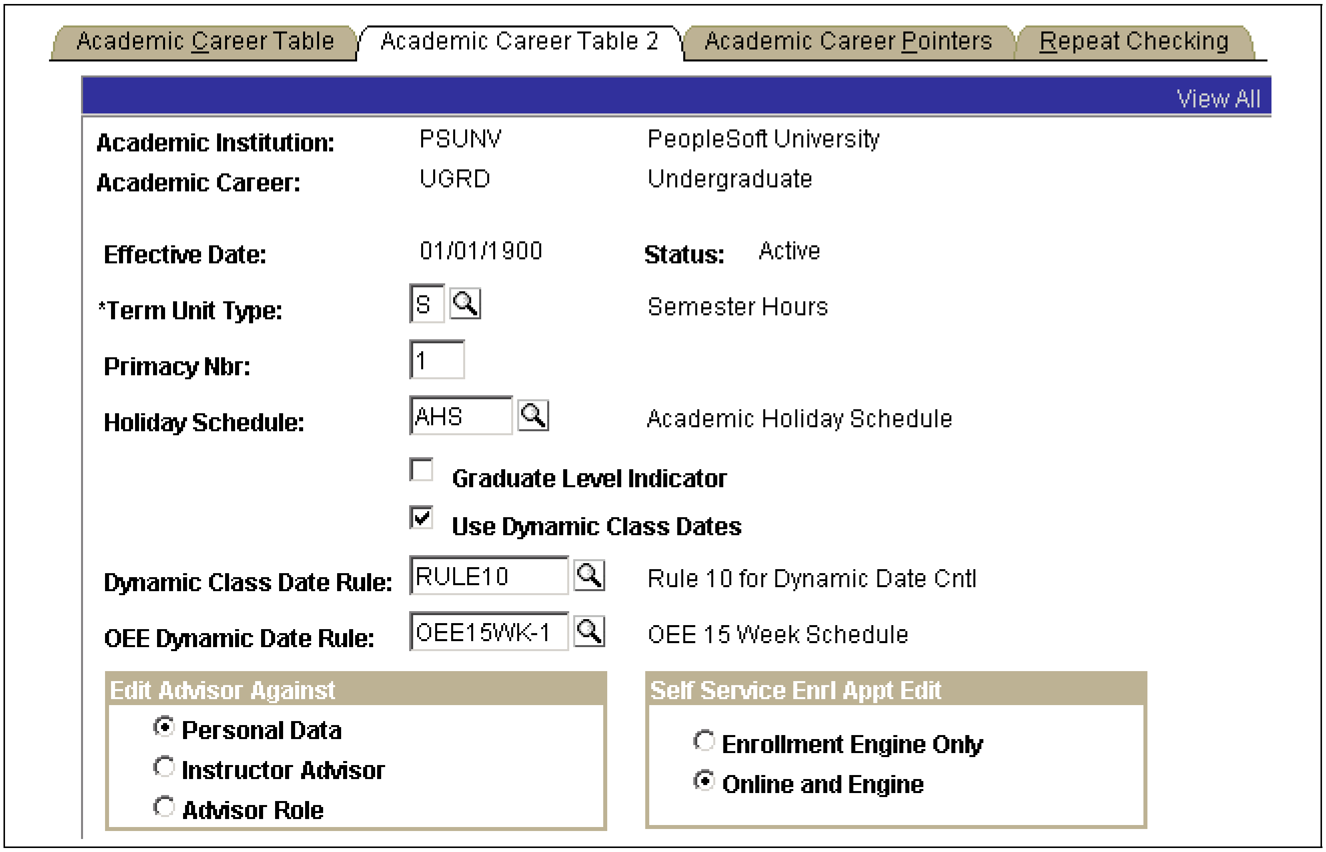
Chapter 9, "Defining Dynamic Academic Calendars," page 127

PeopleSoft 8 SP1 Student Records PeopleBook, "Using Enrollment Related Processes," Creating Historical Enrollment Records

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Transcripts," Designating Enrollment and Statistics Data

Setting Additional Academic Career Parameters

Access the Academic Career Table 2 page.


Academic Career Table | Academic Career Table 2 | Academic Career Pointers | Repeat Checking

View All

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate

Effective Date: 01/01/1900 Status: Active
*Term Unit Type: S Semester Hours
Primacy Nbr: 1
Holiday Schedule: AHS Academic Holiday Schedule
Graduate Level Indicator
Use Dynamic Class Dates
Dynamic Class Date Rule: RULE10 Rule 10 for Dynamic Date Cntl
OEE Dynamic Date Rule: OEE15WK-1 OEE 15 Week Schedule

Edit Advisor Against
Personal Data
Instructor Advisor
Advisor Role

Self Service Enrl Appt Edit
Enrollment Engine Only
Online and Engine

Academic Career Table 2 page

Term Unit Type

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

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

Primacy Number

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

Note. Coordinate your numbering with PeopleSoft Financial Aid to avoid conflicts.

Holiday Schedule

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

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

Graduate Level Indicator Select to indicate that this academic career qualifies as graduate level for tax reporting purposes. You can then include this field in the NSLC reporting process (by using the NSLC report page) to indicate on the NSLC Extract report whether a student was enrolled at the graduate level during a reporting period or term. Otherwise, this field is informational only, and your institution can use it for various reporting purposes.

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

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

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

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

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

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

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

	Advisor Role: Prompts against all people defined as advisors on the Instructor/Advisor Table page, as defined for this academic career.
Self Service Enrl Appt Edit (self-service enrollment appointment edit)	Use this option to indicate how you want to enforce enrollment appointments for self-service enrollment within this academic career. Modification of these translate values requires significant programing effort. *Enrollment Engine Only:* Select this option to have the enrollment engine enforce enrollment appointments in self-service enrollment only when a student submits an enrollment request with an action of enroll or swap for processing by the enrollment engine. *Online and Engine:* Select this option to have the system validate enrollment appointments in self-service enrollment when a student selects a term on the Select Enrollment Term Search page, and when the student enters or selects a class number on the Add Classes, Drop/Update Class, or Swap Classes pages. If the student does not have a valid enrollment appointment or if the open enrollment period for the session that the student is trying to enroll in has not yet begun, these edits prevent the student from submitting enrollment requests. When a qualifying student does submit an enrollment request with an action of enroll or swap, the enrollment engine still enforces enrollment appointments during processing. The system selects this option by default.

See Also

Chapter 9, “Defining Dynamic Academic Calendars,” page 127

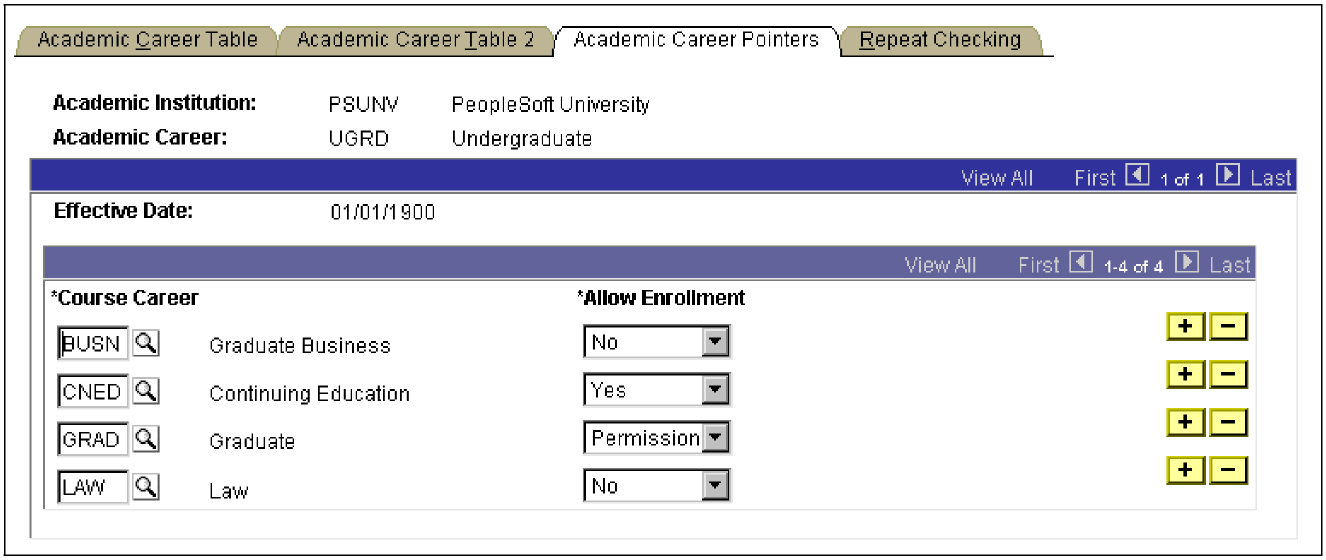
PeopleSoft 8 SP1 Student Records PeopleBook, “Preparing for the Course Catalog and Schedule of Classes”

PeopleSoft 8 SP1 Student Records PeopleBook, “Consolidating and Reporting Academic Statistics”

PeopleSoft Human Resources PeopleBooks for Setting Up Holiday Schedules

Setting Up Academic Career Pointers

Access the Academic Career Pointers page.



Academic Career Pointers page

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

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

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

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

Setting Repeat Checking Controls for Academic Careers

Access the Repeat Checking page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Repeat Checking"

Creating Career Pointer Exception Rules

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

Understanding Career Pointer Exception Rules

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

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

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

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

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

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

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

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

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

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

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

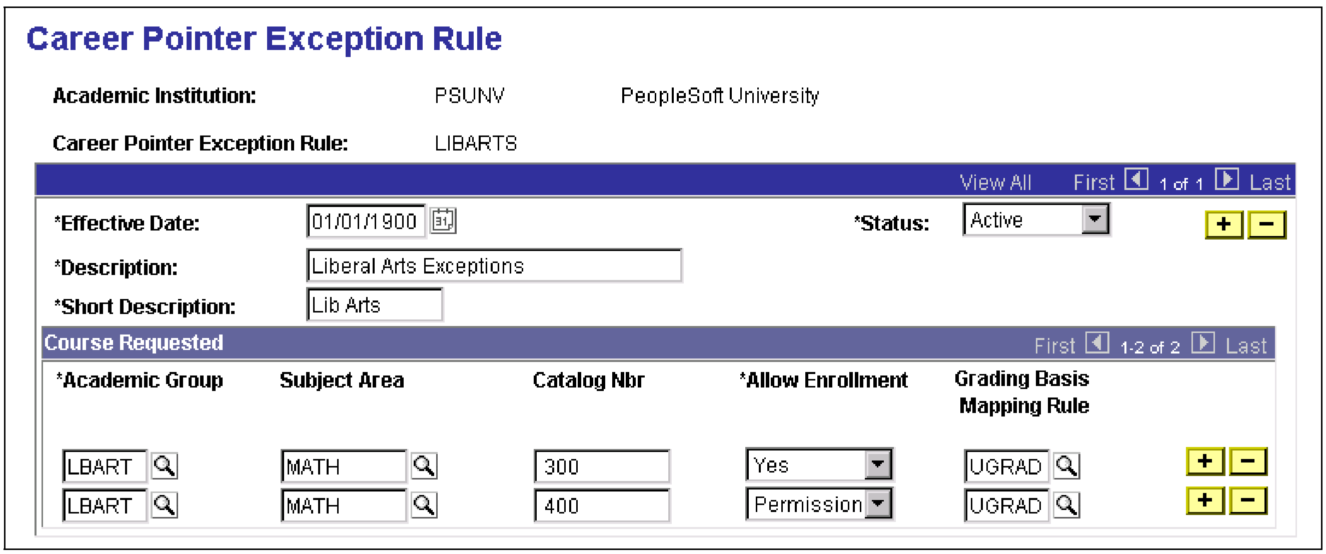
This series of checks assure that the student, according to her or his academic career, is permitted to enroll in the requested course.

Page Used to Create Career Pointer Exception Rules

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

Defining Career Pointer Exception Rules

Access the Career Pointer Exception Rule page.



Career Pointer Exception Rule page

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

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

Catalog Number Enter the maximum catalog number within the subject area or academic group in which a student can request a course. If you want to indicate all catalog numbers within a subject area or academic group, leave this field blank.

Allow Enrollment Select whether a student is permitted enrollment into courses that match the criteria specified in the previous fields. Allow enrollment values are delivered with your system as translate values. Your choices are *Yes, No,* and

	Permission. Selecting *Permission* requires the student to have a general permission or a student-specific permission at enrollment time.
Grading Basis Mapping Rule	Select the grading basis mapping rule for these requested courses. Define grading basis mapping rule values on the Grading Basis Exception Rule page. The system uses the grading basis mapping rule to translate grades earned in another academic group to valid grades within a student's academic career.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Managing the Schedule of Classes," Understanding Class Permissions

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Grading," Defining Grading Basis Exception Rules

Defining Academic Organizations

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

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

Understanding Academic Organizations

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

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

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

See Also

Chapter 12, "Securing Your Academic Institution," Securing Academic Organizations, page 192

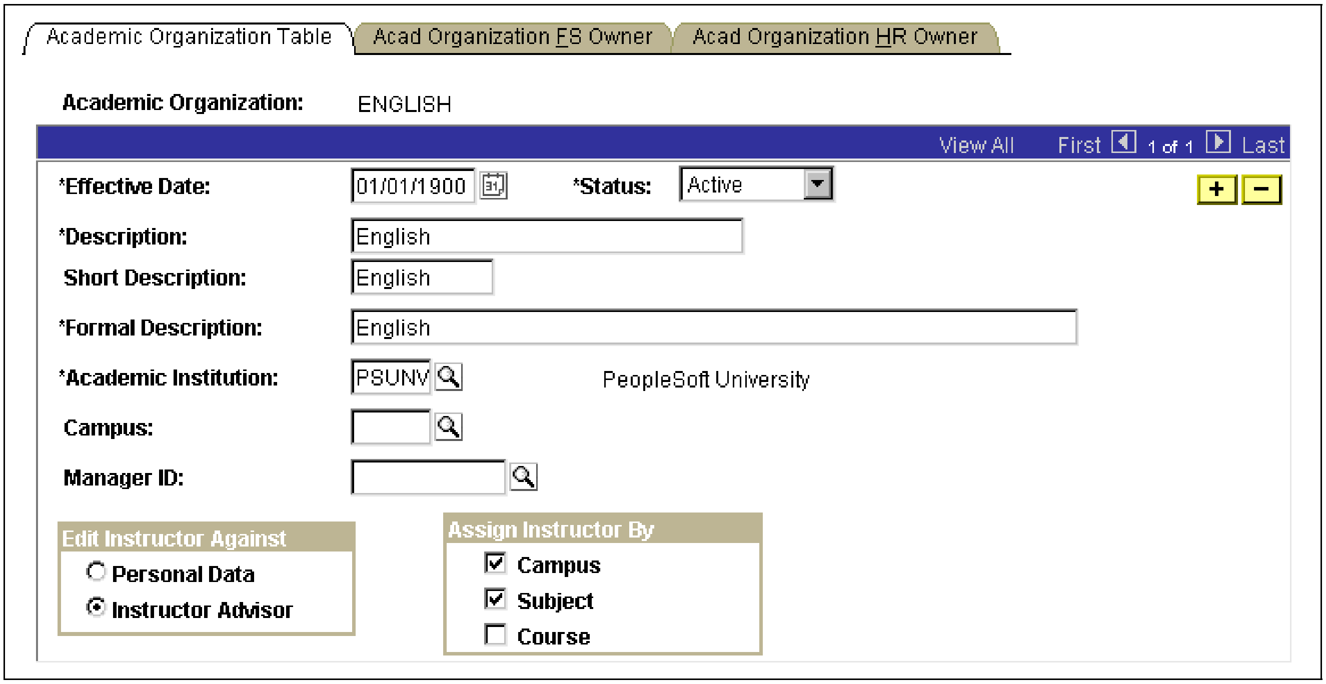
PeopleTools: Tree Manger

Pages Used to Define Academic Organizations

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

Modifying Academic Organizations

Access the Academic Organization Table page.



Academic Organization Table page

Warning! If you are adding new academic organizations directly to this page, the academic institution value on the academic organization record *must* be the same as the academic institution that owns it in the academic organization tree. If these two values are unsynchronized, security and reporting are adversely affected. PeopleSoft therefore recommends that you add new academic organizations through PeopleSoft Tree Manager.

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

Academic Institution Select the academic institution to which this academic organization belongs. This academic institution value must be the same as the academic institution on the academic organization tree. If these two values are unsynchronized, security and reporting are adversely affected.

Campus Select the campus to which this academic organization belongs.

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

Edit Instructor Against

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

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

Instructor Advisor People defined as instructors and advisors in the Instructor/Advisor Table component. The Instructor/Advisor component allows you to link instructors to courses for which they are approved and available to teach for specified periods of time. When you are scheduling classes and selecting an instructor, the system prompts you with a list of only these instructors, thus simplifying the assignment of instructors to classes.

Assign Instructors By

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

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

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Designating Approved Instructors and Advisors

Designating Financial Ownership for Academic Organizations

Access the Acad Organization FS Owner page.

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

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

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

Designating Human Resource Ownership for Academic Organizations

Access the Acad Organization HR Owner page.

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

Percent Owned Enter the percentage of the academic organization for which the human resources department is responsible. You can have multiple human resources departments with split ownership of the academic organization, but the total percent owned between all departments must equal *100.*

Defining Academic Groups

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

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

Understanding Academic Groups

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

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

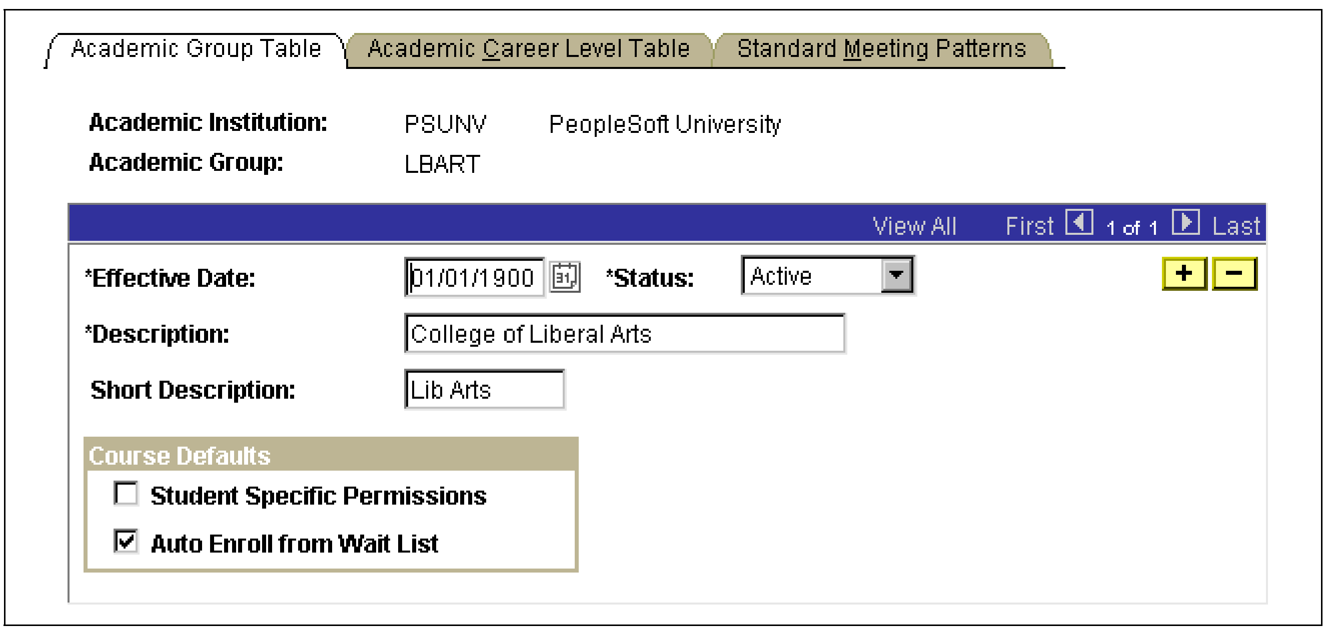
Use the Academic Group component to define academic groups and link academic careers and standard class meeting patterns to them.

Pages Used to Define Academic Groups

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

Describing Academic Groups

Access the Academic Group Table page.



Academic Group Table page

Setting Course Defaults

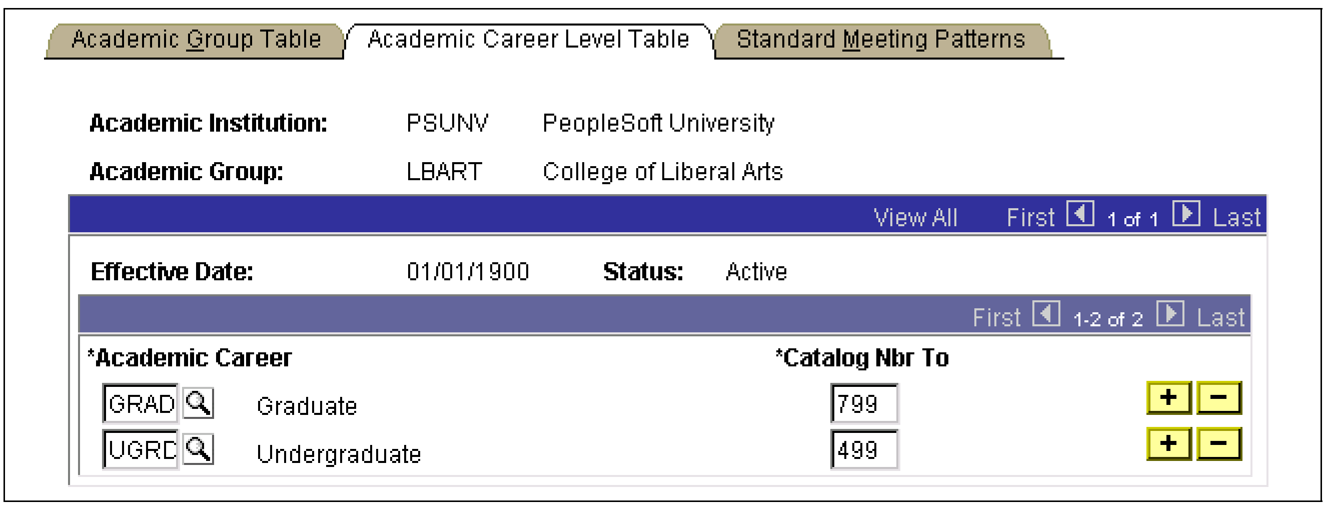
Use the Course Defaults group box to set default values for the course catalog and schedule of classes pages. The fields in this group box are to ease data entry. You can override these default values for individual courses and classes.

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

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

Linking Academic Career Catalog Numbers to Academic Groups

Access the Academic Career Level Table page.



Academic Career Level Table page

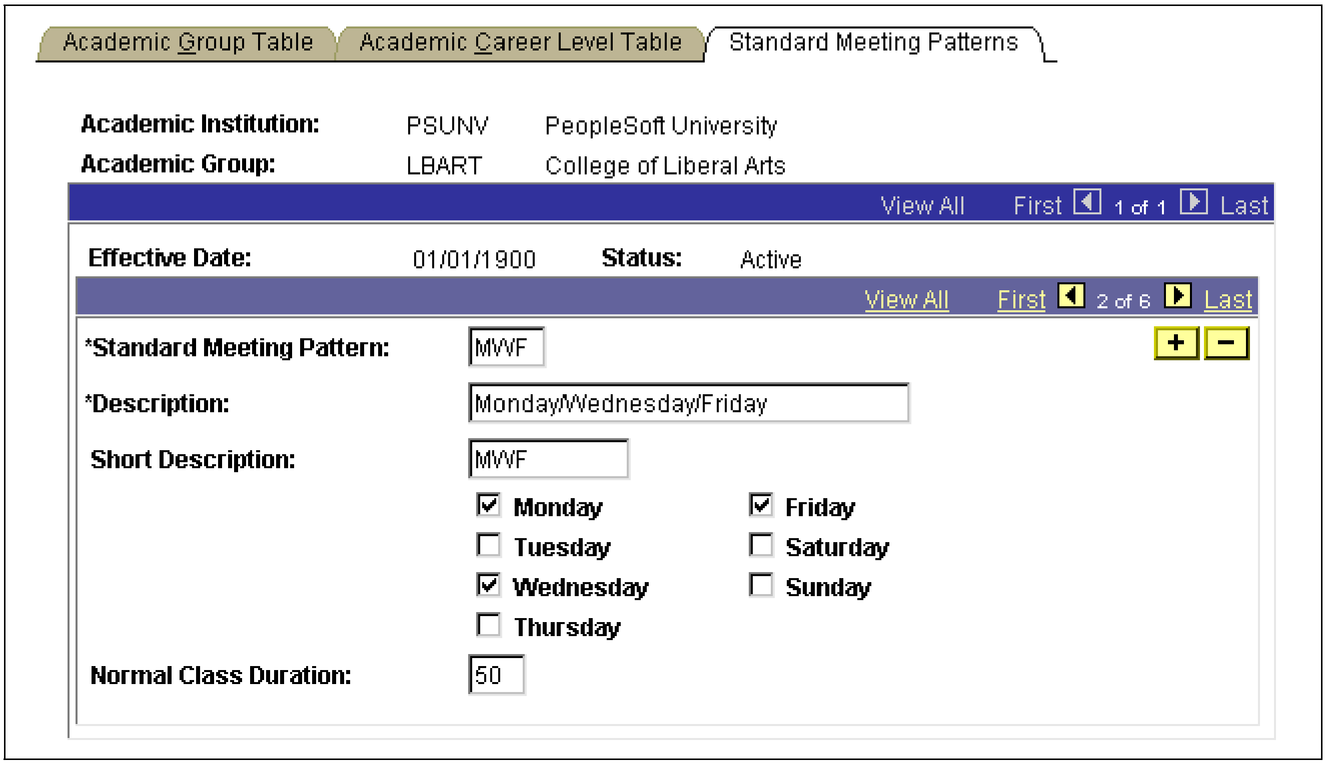
Academic Career Select the academic career that you want to link to this academic group. Insert additional rows to enter all academic careers that you want to link to this academic group.

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

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

Defining Standard Class Meeting Patterns

Access the Standard Meeting Patterns page.



Standard Meeting Patterns page

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

Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday (days of the week check boxes) — Select the appropriate days of the week for this standard meeting pattern.

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

Establishing Fields of Study

This section discusses how to define fields of study.

Page Used to Establish Fields of Study

Page Name	Object Name	Navigation	Usage
Field of Study Table	STUDY_FIELD_TABLE	Design Student Administration, Define Student Administration, Setup, Field of Study Table	Define fields of study. Link fields of study to academic subjects on the Subject Taxonomy page and to academic plans on the Academic Plan Taxonomy page.

Modifying CIP and HEGIS Codes

Classification of Instructional Programs (CIP) codes and Higher Education General Information Survey (HEGIS) codes are delivered with your system. You can modify descriptions of the codes and add new codes through the CIP Code Table page and the HEGIS Code Table page.

This section discusses how to:

- Modify CIP codes.
- Modify HEGIS codes.

Pages Used to Modify CIP and HEGIS Codes

Page Name	Object Name	Navigation	Usage
CIP Code Table (Classification of Instructional Programs code table)	CIP_CODE_TABLE	• Design Student Administration, Define Student Administration, Setup, CIP Code Table • Manage Student Records, Establish Courses, Setup, CIP Code Table	Modify descriptions of the CIP codes shipped with PeopleSoft Student Administration and Contributor Relations Solutions.
HEGIS Code Table (Higher Education General Information Survey code table)	HEGIS_CODE_TABLE	• Design Student Administration, Define Student Administration, Setup, HEGIS Code Table • Manage Student Records, Establish Courses, Setup, HEGIS Code Table	Modify descriptions of the HEGIS codes shipped with PeopleSoft Student Administration and Contributor Relations Solutions.

Modifying CIP Codes

Access the CIP Code Table page.

Alternative CIP Code (alternative Classification of Instructional Programs code)	Some states derive their own coding schemes from the CIP code. If applicable, enter the alternative CIP code of the state.

Modifying HEGIS Codes

Access the HEGIS Code Table page.

Defining Subject Areas

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

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

Understanding Subject Areas

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

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

See Also

Chapter 12, "Securing Your Academic Institution," page 177

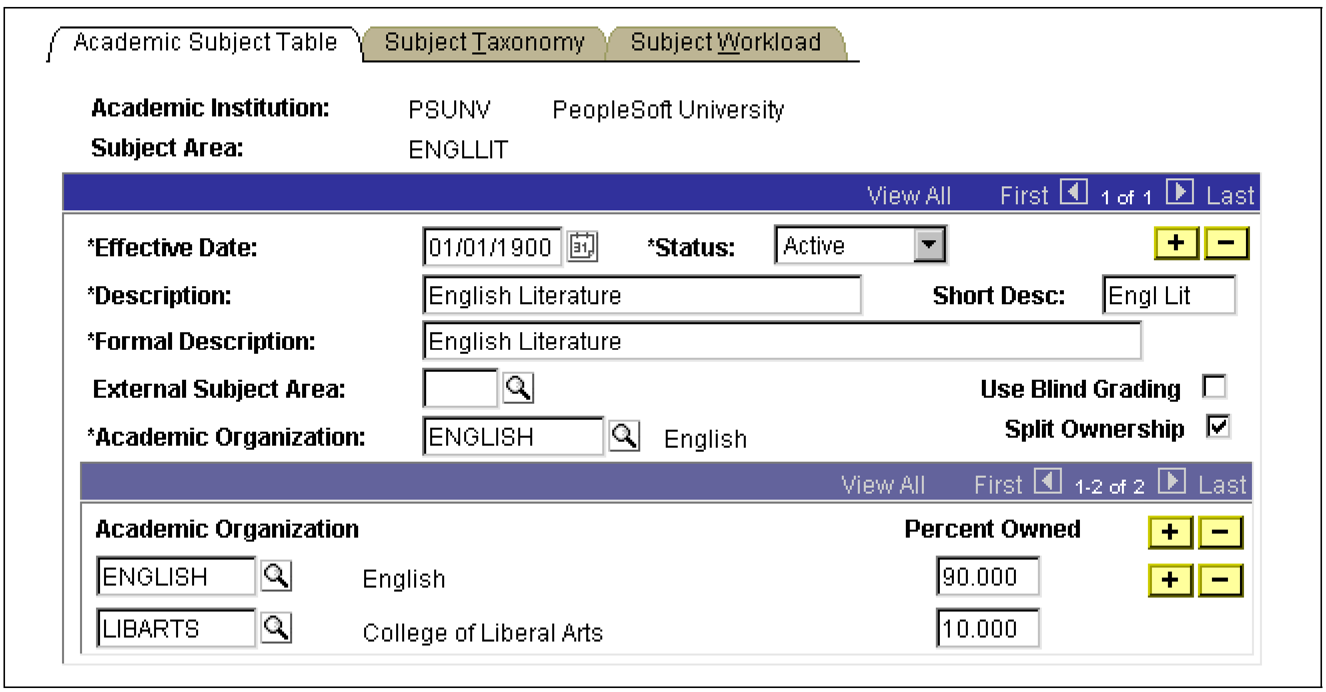
PeopleTools: Tree Manager

Pages Used to Define Subject Areas

Page Name	Object Name	Navigation	Usage
Academic Subject Table	SUBJECT_TABLE	Design Student Administration, Design Academic Structure, Setup, Academic Subject Table, Academic Subject Table	Describe subject areas, modify existing subject area descriptions, link subject areas to academic organizations, and set other parameters such as blind grading.
Subject Taxonomy\	SUBJECT_TAXONOMY	Design Student Administration, Design Academic Structure, Setup, Academic Subject Table, Subject Taxonomy	Define subject area taxonomy by linking subject areas to CIP and HEGIS codes and to fields of study.
Subject Workload	SUBJ_WORKLD_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Subject Table, Subject Workload	Define subject/component mulipliers by the weight of each component within each subject area at your academic institution.

Describing Subject Areas

Access the Academic Subject Table page.



Academic Subject Table page

External Subject Area Currently not in use.

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

Academic Organization (upper)	Select the academic organization that offers courses in this subject area. Any academic organization entered here should also have a detail node associated with it for this subject area on the academic organization tree.
Split Ownership	Select to designate multiple academic organization owners for this subject area. If you select this check box, the Academic Organization field and the Percent Owned field become available for edit.
Academic Organization (lower)	Select the academic organization that owns this subject area. Define academic organization values on the academic organization tree in PeopleSoft Tree Manager and modify these values on the Academic Organization Table component.
Percent Owned	Enter the percentage of the subject area for which the academic organization is responsible. You can have academic organizations with split ownership of the subject area, but the total percent owned between academic organizations must equal *100.*

Defining Subject Area Taxonomy

Access the Subject Taxonomy page.

CIP Code (Classification of Instructional Programs code)	Select the CIP code for this subject area. CIP Code values are delivered with your system as translate values. You can modify CIP codes on the CIP Code Table page.
HEGIS Code (Higher Education General Information Survey code)	Select the HEGIS code for this subject area. HEGIS codes are delivered with your system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.
Field of Study	Select a field of study for this subject area.

Defining Subject/Component Multipliers

Access the Subject Workload page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Instructor Workload”

PeopleSoft 8 SP1 Student Records PeopleBook, “Tracking Instructor Workload”

CHAPTER 7

Establishing Terms and Sessions

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

This chapter discusses how to:

- Define Term Values.
- Set up time periods.
- Define enrollment action reasons.
- Define terms, sessions, and session time periods.

See Also

Chapter 8, "Defining Traditional Academic Calendars," page 115

Chapter 9, "Defining Dynamic Academic Calendars," page 127

Defining Term Values

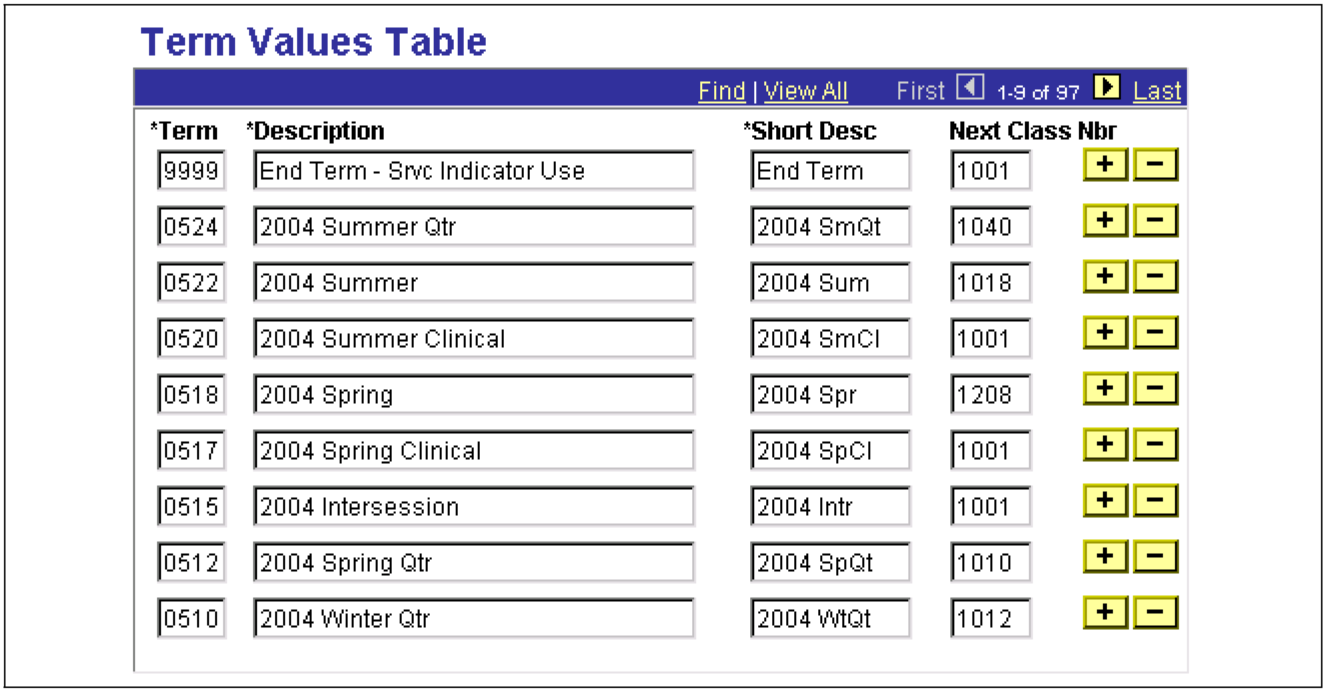
This section discusses how to set upterm values.

Page Used to Set Up Term Values

Page Name	Object Name	Navigation	Usage
Term Values Table	TERM_VALUES_TABLE	Design Student Administration, Design Academic Structure, Setup, Term Values Table	Set up the term values and their descriptions. You use these term values for all academic institutions and careers throughout PeopleSoft Student Administration, regardless of the structure of the terms you define.

Setting Up Term Values

Access the Term Values Table page.



Term Values Table page

Term

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

Next Class Nbr (next class number)

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

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

Setting Up Time Periods

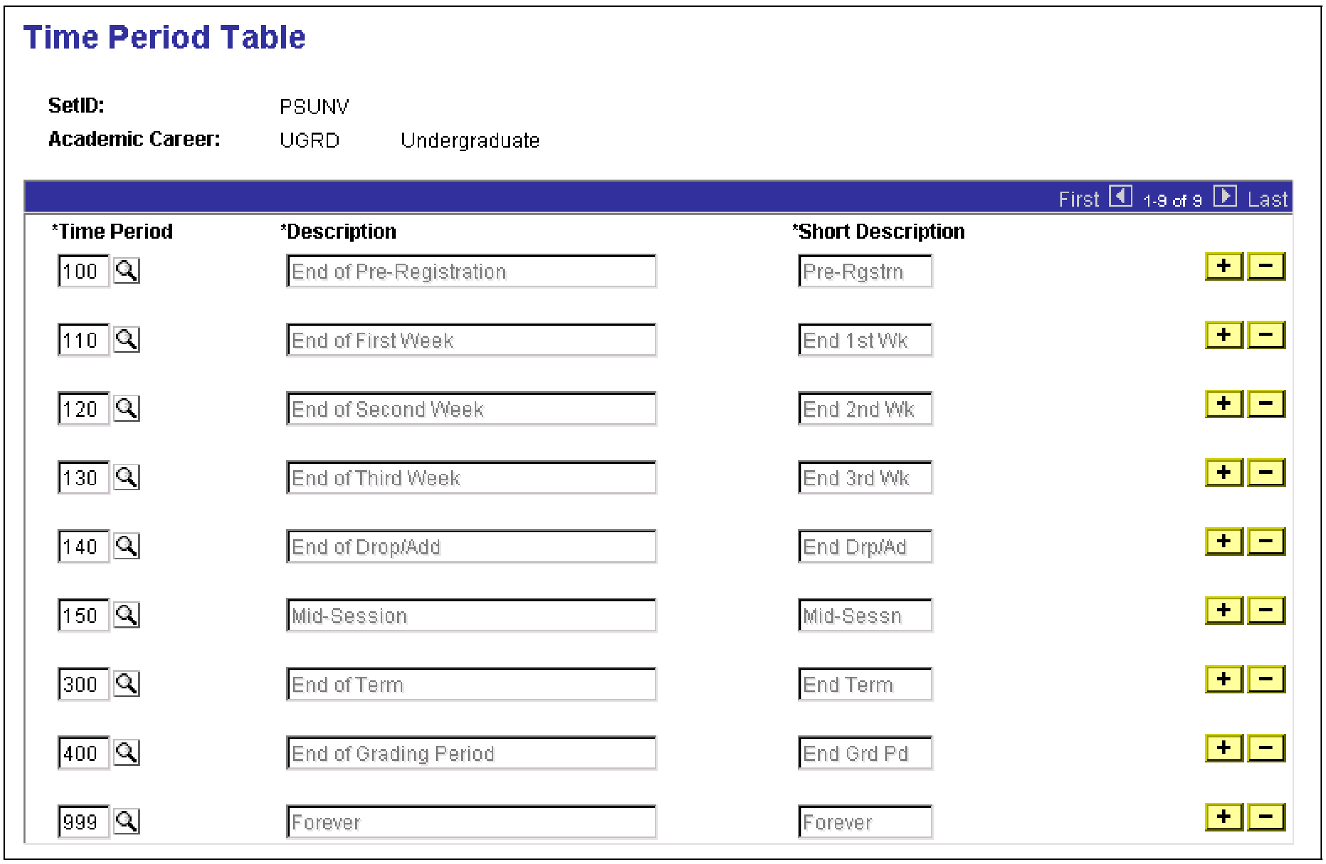
This section discusses how to define time periods.

Page Used to Set Up Time Periods

Page Name	Object Name	Navigation	Usage
Time Period Table	TIME_PERIOD_TABLE	• Design Student Administration, Define Student Administration, Setup, Time Period Table • Manage Student Records, Establish Courses, Setup, Time Period Table	Define the time periods, or critical points in time, that are valid for each academic career within a setID.

Defining Time Periods

Access the Time Period Table page.



Time Period Table page

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

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

Description This value migrates from the translate table when you select a time period.

Short Description This value migrates from the translate table when you select a time period.

See Also

Chapter 15, "Securing Student Records," page 209

Creating Enrollment Action Reasons

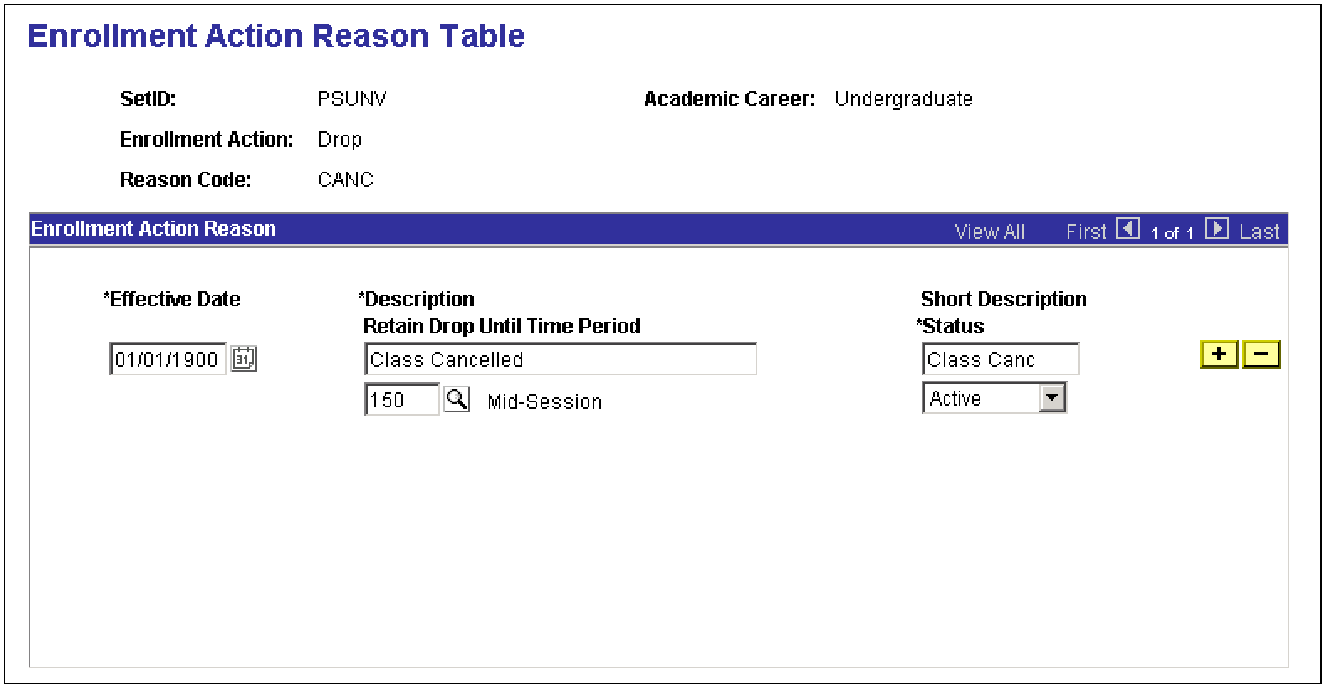
This section discusses how to define enrollment action reasons.

Page Used to Create Enrollment Action Reasons

Page Name	Object Name	Navigation	Usage
Enrollment Action Reason Table	ENRL_RSN_TBL	• Design Student Administration, Define Student Records, Setup, Enrollment Action Reason, Enrollment Action Reason Tabl • Manage Student Records, Manage Academic Records, Setup, Enrollment Action Reason, Enrollment Action Reason Table	Define enrollment action reasons to have the option to add more relevant information to class enrollment transactions.

Defining Enrollment Action Reasons

Access the Enrollment Action Reason Table page.



Enrollment Action Reason Table page

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

Retain Drop Until Time Period

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Using Enrollment Related Processes”

Defining Terms, Sessions, and Session Time Periods

PeopleSoft Student Administration allows you to link defined terms to every academic career at your academic institution. This enables you to structure different terms and sessions, depending upon the academic career, to suit your institutional needs.

This section discusses how to:

- Define the terms that you link to academic careers.
- Define the sessions within these terms.

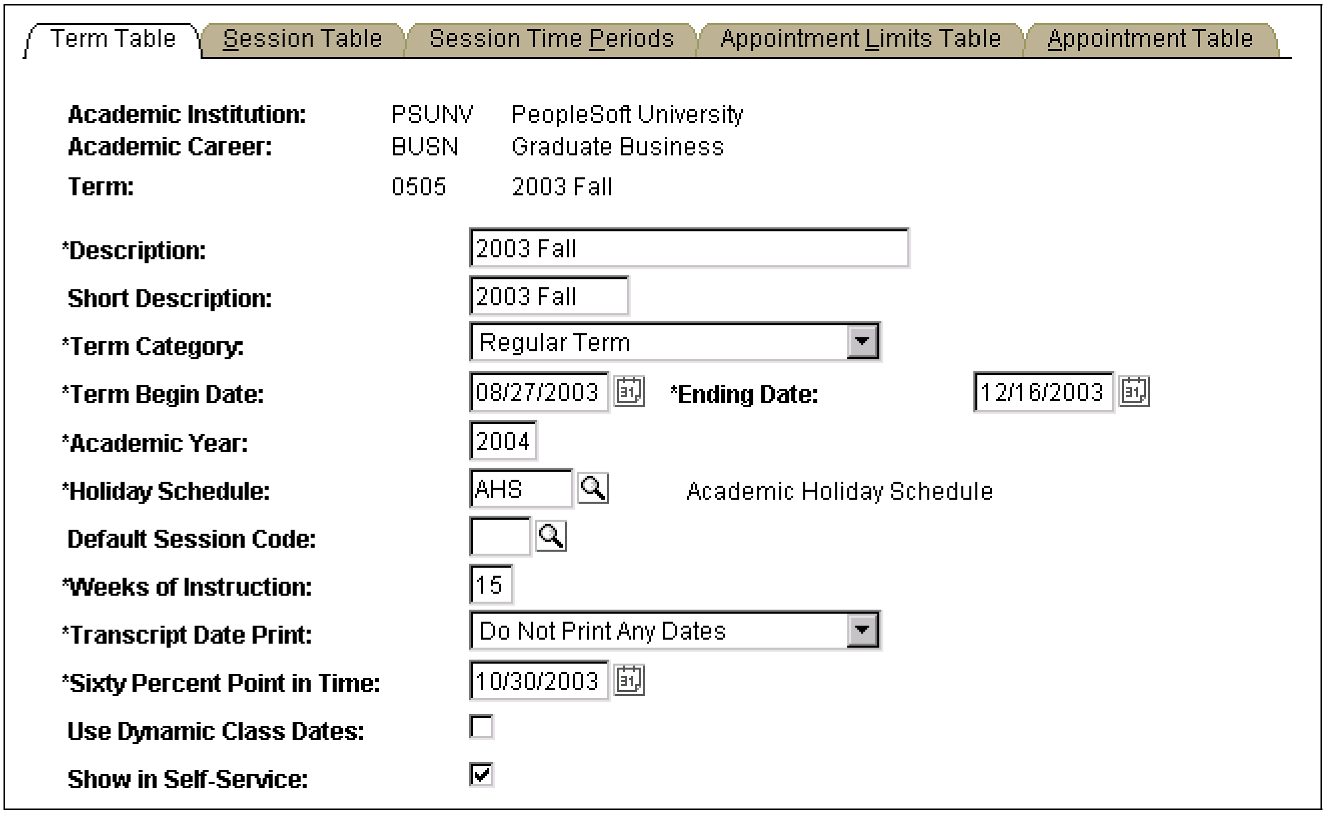
- Define the session time periods.

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

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

Defining Terms

Access the Term Table page.



Term Table page

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

Copy from Career	Use this field to copy term and session information from one academic career to another to reduce data entry. Once you define and save term and session information for one academic career through this component, this field becomes available in Add mode. Enter the term that contains the information to copy and exit the field. The system automatically copies the information into the component for you.
Term Category	Select the category that best describes the term. You can modify these translate values.
Term Begin Date	Enter the first official date of the term. The system uses the term begin date as the effective date of the term. The term begin and end dates are important because they help to determine, for example, the courses that are available for the term, the status of a student's academic program and academic plan, and so on. These dates are referenced throughout the system.
Ending Date	Enter the last official date of the term.
Holiday Schedule	Select the holiday schedule for the term. Define holiday schedule values on the Holiday Schedule Table page in PeopleSoft Human Resources.
Default Session Code	Select the default session code. This value is used throughout the system to supply the session code associated with the term, although the value can be overridden. The default serves as a data entry aid.

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

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

Transcript Date Print — Select from the following choices the dates that you want to print on student transcripts for this academic career and term combination. The value of this field appears by default, based on the corresponding field value from the SA Options page of the Installation Table component. Any modification to these translate values requires a substantial programming effort.

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

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

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

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

Sixty Percent Point in Time — Enter the date on which the term is sixty percent complete. The system uses this date when computing refunds for students. In the United States, the majority of academic institutions stop issuing refunds at this point.

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

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

See Also

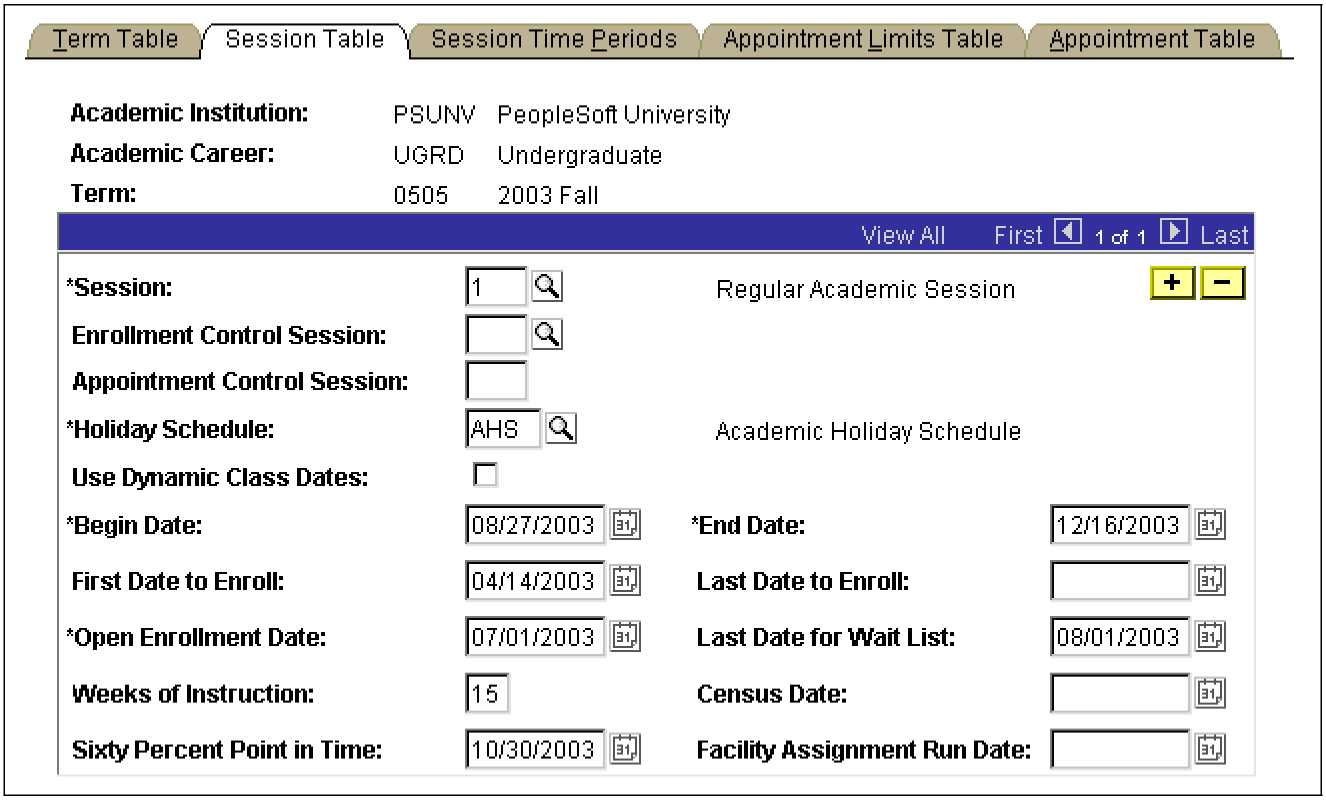
Chapter 9, "Defining Dynamic Academic Calendars," page 127

PeopleSoft 8 SP1 Student Financials PeopleBook, "Refunding Customers"

PeopleSoft Human Resources PeopleBooks for Setting Up Holiday Schedules

Defining Sessions

Access the Session Table page.



Session Table page

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

Session

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

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

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

Enrollment Control Session

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

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

Appointment Control Session

Enter a session value that you have already defined for this term to point this session's appointment information to that other session, thus simplifying data entry.

For example, by pointing the appointment control session for a 12-week session and a 6-week session at a regular session, the appointment information defined for the regular session becomes valid for both the 12-week and 6-week sessions. A student can therefore register in all three sessions for the term with a single appointment. As a result, the Appointment Limit Table page and the Appointment Table page for the 12-week and 6-week sessions become unavailable for edit.

Holiday Schedule

Select the holiday schedule for the session. Define holiday schedule values on the Holiday Schedule Table page in PeopleSoft Human Resources.

Use Dynamic Class Dates

Select this check box to enable the Dynamic Class Dates feature for all classes scheduled within this session.

Begin Date and End Date

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

First Date to Enroll

Enter the first date when students can enroll into classes for the given session. The enrollment engine prevents students from enrolling into classes before the date that you specify. This field is required for Open Entry/Exit (OEE) sessions but optional for all other sessions. The first date to enroll must be on or before the start date of the first enrollment appointment within the session.

Last Date to Enroll

Enter the last date when students can enroll into classes for the given session. The enrollment engine prevents students from enrolling into classes after the date that you specify. This field is required for Open Entry/Exit (OEE) sessions but optional for all other sessions. The last date to enroll must be on or after the end date of the last enrollment appointment within the session.

Open Enrollment Date

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

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

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

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

Sixty Percent Point in Time Enter the date that you consider the session to be sixty percent complete. The system uses this date when computing refunds. In the United States, the majority of academic institutions stop issuing refunds at this point.

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

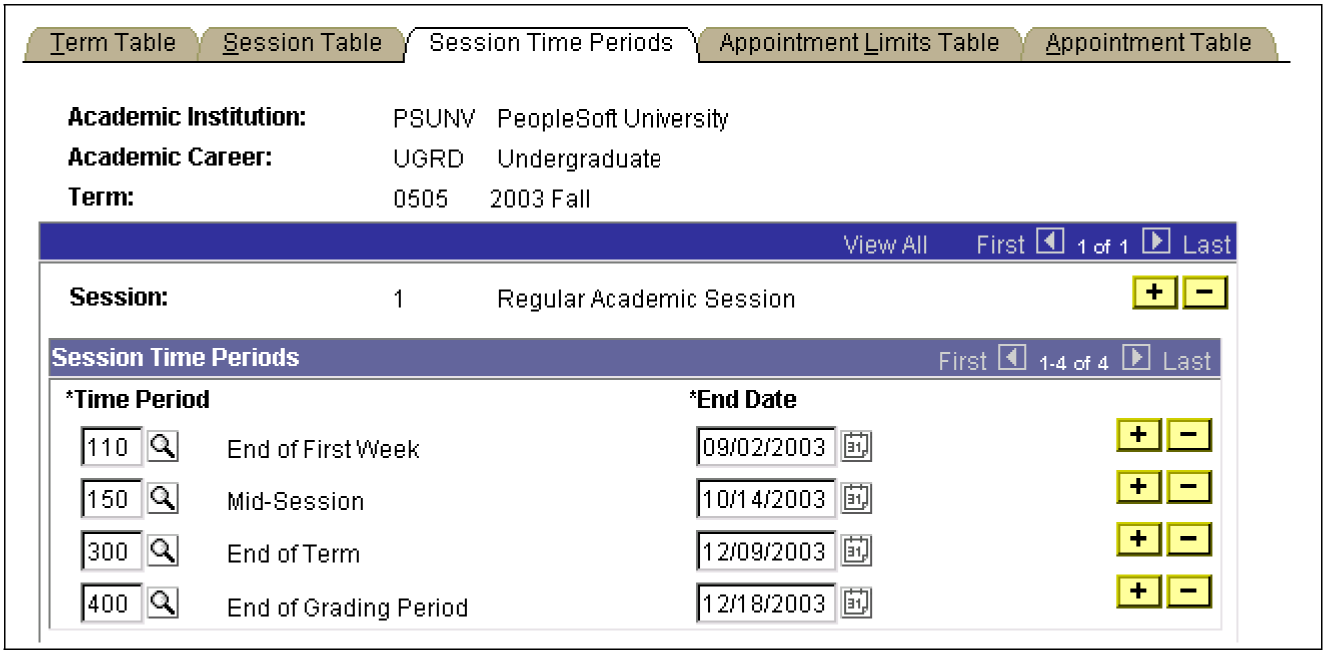
See Also

Chapter 9, "Defining Dynamic Academic Calendars," page 127

PeopleSoft 8 SP1 Student Financials PeopleBook, "Refunding Customers"

Defining Session Time Periods

Access the Session Time Periods page.



Session Time Periods page

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

Many of the dates required impact more than one area of PeopleSoft Student Administration, such as withdrawal dates. Keep in mind that the PeopleSoft Student Financials, Financial Aid, and Student Records applications all need to be in agreement on the dates set here.

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

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

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

See Also

Chapter 15, "Securing Student Records," Setting Up Enrollment Access IDs, page 210

CHAPTER 8

Defining Traditional Academic Calendars

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

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

This chapter provides an overview of traditional academic calendars and discusses how to define them.

Understanding Traditional Academic Calendars

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

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

Defining Traditional Academic Calendars

This section discusses how to:

- Describe academic calendars.
- Set up term landmark dates.

- Define self-service graduation terms.
- Set up session cancellation and withdrawal dates.
- Set up session drop dates.

Pages Used to Define Traditional Academic Calendars

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

Describing Academic Calendars

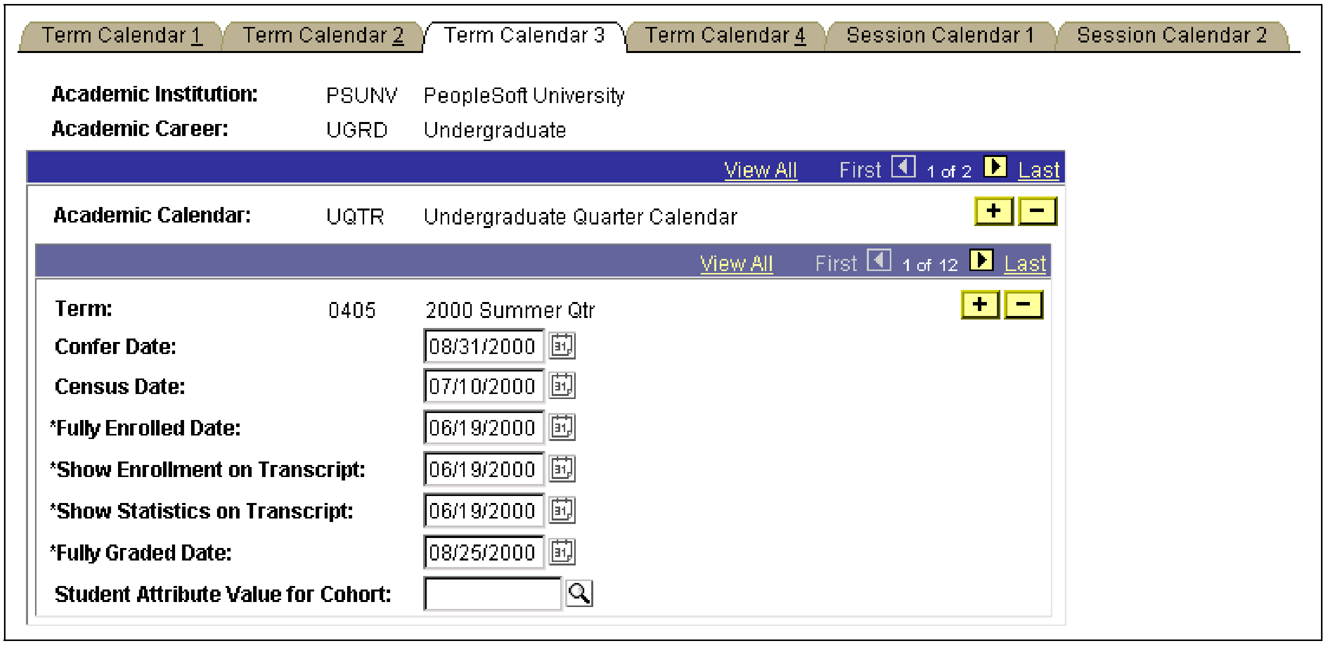
Access the Term Calendar 1 page.

Academic Calendar

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

Setting Up Term Landmark Dates

Access the Term Calendar 3 page.



Term Calendar 3 page

Confer Date

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

Census Date

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

Fully Enrolled Date

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

Show Enrollment On Transcript

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

Show Statistics On Transcript

Enter the date on which academic statistics will appear on transcripts for students who are active in the specified term for the given academic career. When you define transcript types, you can indicate on the

Transcript Type - Basic Data page whether the transcript processes should obey this date and display term statistics.

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

Student Attribute Value for Cohort Currently not in use.

Defining Self-Service Graduation Terms

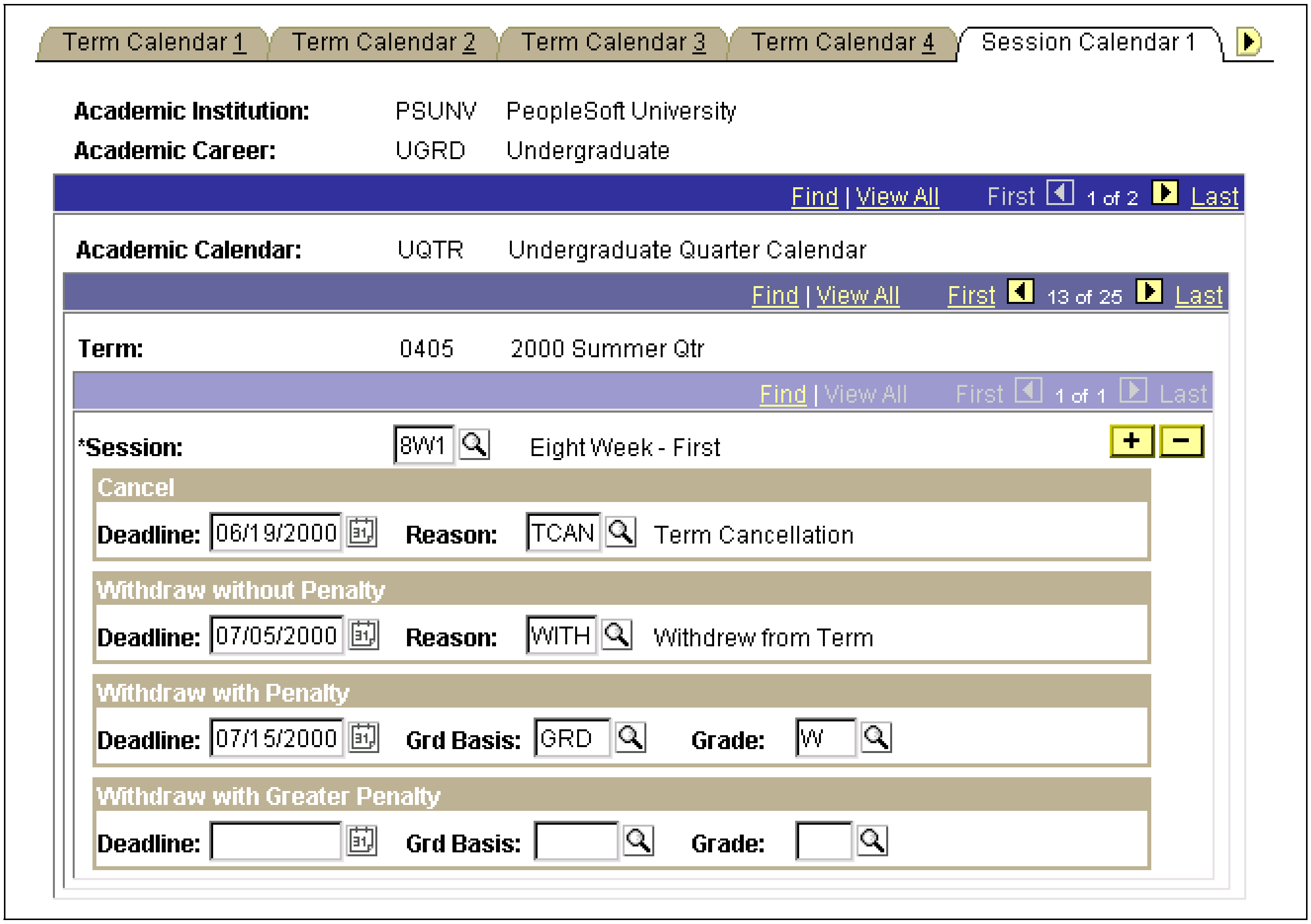
Access the Term Calendar 4 page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Graduating Students,” Applying for Graduation Through Self-Service

Setting Up Session Cancellation and Withdrawal Dates

Access the Session Calendar 1 page.



Session Calendar 1 page

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

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

Cancel

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

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

Withdraw without Penalty

Deadline Enter the last date on which students within the given academic career can withdraw from a class within this session without any GPA penalty.

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

Withdraw with Penalty

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

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

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

Withdraw with Greater Penalty

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

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

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

See Also

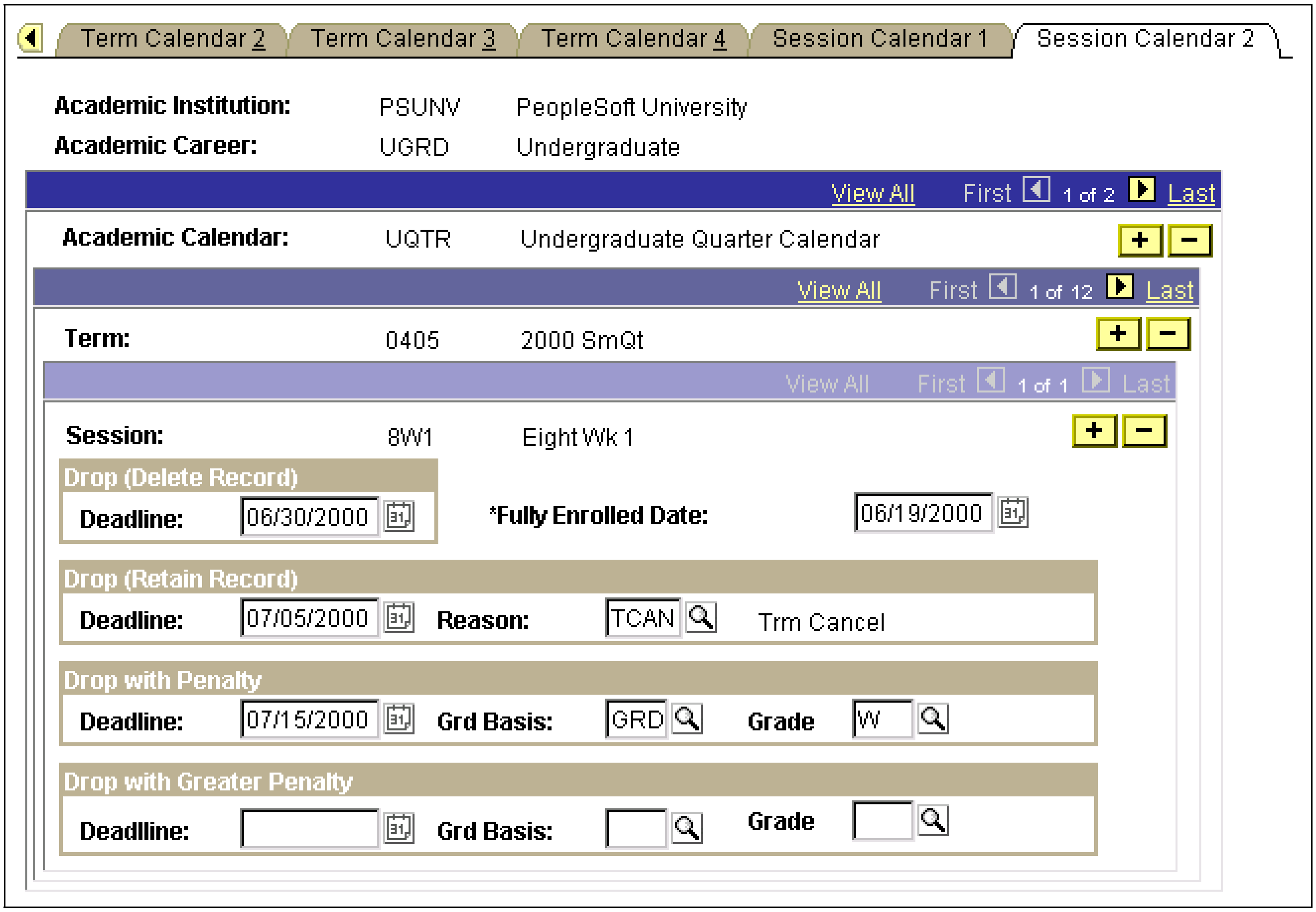
PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Grading," Defining Grading Schemes

PeopleSoft 8 SP1 Student Records PeopleBook, "Using Enrollment Related Processes," Understanding Withdrawal and Cancellation Processing

PeopleSoft 8 SP1 Student Financials PeopleBook, "Refunding Customers"

Setting Up Session Drop Dates

Access the Session Calendar 2 page.



Session Calendar 2 page

Drop (Delete Record)

Deadline

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

Additional Elements

Fully Enrolled Date

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

Drop (Retain Record)

Deadline

Enter the last date on which students within the given academic career can drop from a class within the specified session without having the class appear as a drop on their transcripts and without any GPA penalty. If students drop a class *after* the drop-delete-record deadline, *but on or before* this deadline, the system retains the student's enrollment record, sets the record to dropped status, and designates the reason. The refund impact is based upon the refund dates and periods as defined within PeopleSoft Student Financials.

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

Drop with Penalty

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

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

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

Drop with Greater Penalty

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

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

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Grading,” Defining Grading Schemes

PeopleSoft 8 SP1 Student Records PeopleBook, “Processing Class Enrollment Transactions”

Understanding Enrollment Request Processing for Drops

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

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

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

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

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

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

- Determines the deadlines according to the values that the Dynamic Class Dates process calculates and displays on the Dynamic Class Data page.

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

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

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

When requesting to drop an *open entry/exit class enrollment,* the enrollment engine:

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

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

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

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

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

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

CHAPTER 9

Defining Dynamic Academic Calendars

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

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

Understanding Dynamic Academic Calendars

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

A dynamic academic calendar goes beyond the static landmark dates based on term and session structure. This type of calendar gives you the power to dynamically control landmark dates for individual classes or student enrollments themselves. You might use dynamic academic calendars, for instance, if your academic institution has a rolling admission and enrollment business process that enables your students to begin their academic program at any point in the calendar year. In this case, a large portion of the classes that you offer might need their own academic calendar in order to be free from the constraints of the term and session structure because these classes need their own deadlines and landmark dates. You might also use dynamic academic calendars if your academic institution offers students open-entry enrollment into classes so that the students are free to enroll in the class at any time during the calendar year and complete the class at their own pace, such as with many classes taught over the internet. PeopleSoft refers to this type of enrollment as open entry/exit (OEE) enrollment.

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

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

To create dynamic academic calendars:

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

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

Warning! You *must* run the Dynamic Class Dates process for classes scheduled in a dynamic date session prior to performing enrollment transactions because the process creates the Dynamic Class Dates table that the system uses for enrollment transactions. If you do not run the process, the system assumes that no rule exists and therefore permits every class drop. This warning does not apply to classes scheduled in OEE sessions.

Understanding Dynamic Class Date Rules

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

You define a rule scheme for the landmark date of your dynamic class date rule. A rule scheme indicates the method that the Dynamic Class Dates process uses as a basis for calculating the applicable landmark date. Your selection varies depending on the type of rule that you define. All rule schemes are valid for dynamic class date rules, but rule schemes that relate to class meetings are invalid for OEE dynamic date rules due to the nature of open entry and exit classes. You can define rule schemes by the following:

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

Then you define a rounding scheme for the landmark date of your dynamic class date rule. A rounding scheme provides the ability to round the deadline up or down to various days. Once the Dynamic Class Dates process determines the landmark date according to the rule scheme and factor (known as the *basis day*), it adjusts that date according to the rounding scheme. All rounding schemes are valid for dynamic class date rules, but rounding schemes that relate to class meetings are invalid for OEE dynamic date rules due to the nature of open entry/exit classes. You can define rounding schemes by the following:

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

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

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

Reviewing Examples of Dynamic Class Date Rules

Let's look at several examples of how the Dynamic Dates process (SRDYNADT and SRPCDYNP) calculates deadlines for a dynamic academic calendar.

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

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

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

Other possible deadlines in this example, depending on the rounding scheme you select, are as follows:

Last Wait List Date Rounding Scheme	**Last Wait List Date Deadline**
Basis Day	March 11
Previous Day	March 10
Next Day	March 12
Next Meeting Day	March 18
Beginning of Week (Monday)	March 9
Previous Meeting Day	March 4
Beginning of Next Week (Next Monday)	March 16

Since the system dynamically calculates the landmark dates of the academic calendar, you can apply the same rule to any number of classes.

To further illustrate how the system uses the dynamic class date rule that you create, let's say that you have a ten-week class that meets once a week, starting January 1. You select in the Drop Dates group box on the Dynamic Class Dates page a rule scheme of *Number of Class Meetings* and a rounding scheme of *Basis Day.* You have four drop deadlines—drop (delete) record, drop (retain) record, drop with penalty, and drop with greater penalty. The consequence of violating each deadline becomes more severe as a greater amount of time passes. Let's say that you want these deadlines to occur a week apart, starting the second week of class. You would enter *2* in the Drop Deadline (delete) Factor field, *3* in the Drop Deadline (retain) Factor field, *4* for the Drop Deadline (Penalty) Factor field, and *5* for the Drop Deadline (Penalty2) Factor field.

Once you save the rule and assign it to the appropriate class, the Dynamic Class Dates process can dynamically calculate each of these drop deadlines for the class. According to the rule scheme and factors that you specified, the process calculates the basis day for each of your drop deadlines as January 8, January 15, January 22, and January 29. In this scenario, because you have selected to use basis day as your rounding scheme, the process determines that your drop deadlines are the same as the dates for your basis days.

Creating Dynamic Class Date Rules

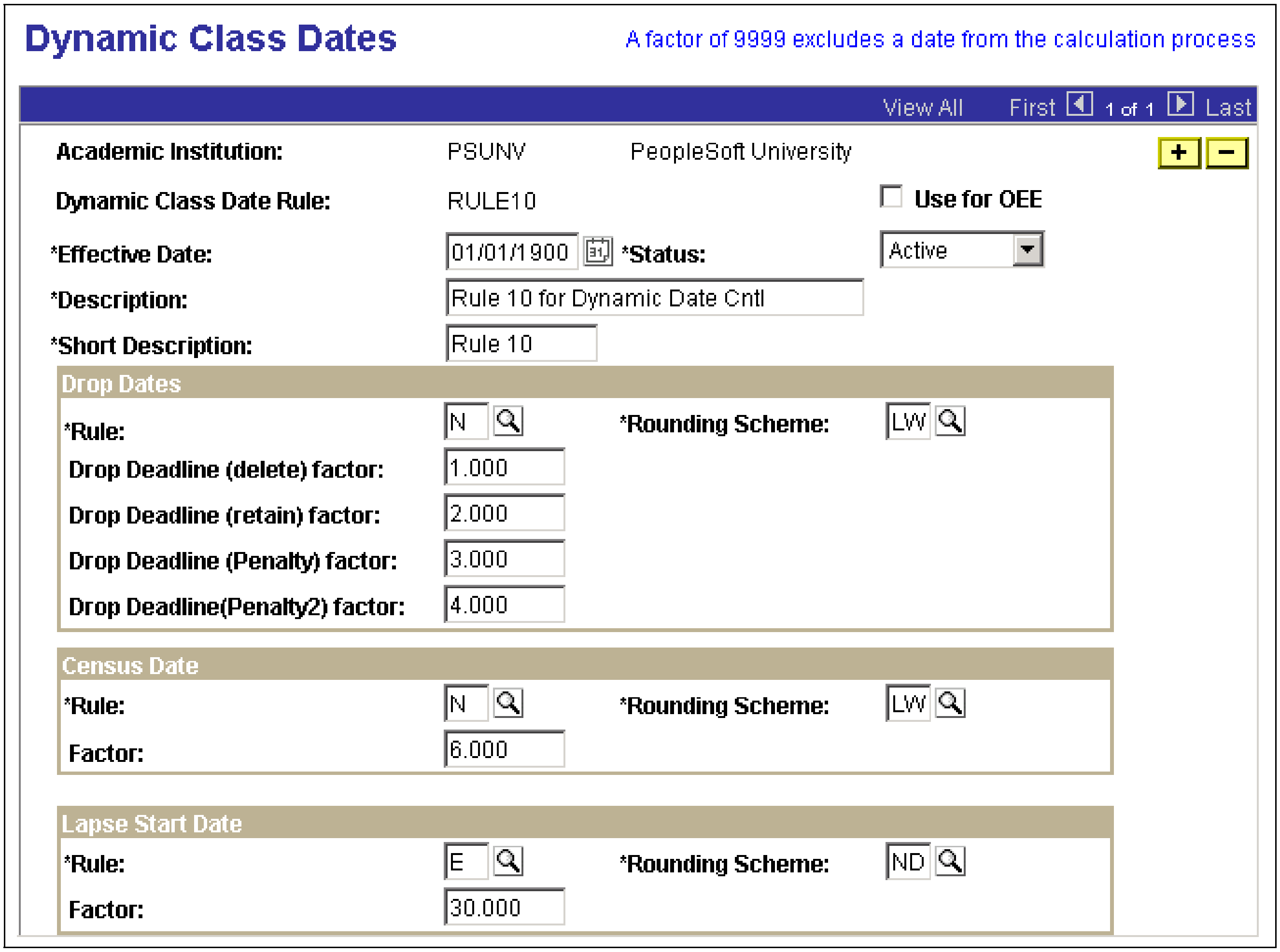
This section discusses how to establish dynamic class date rules.

Page Used to Create Dynamic Class Date Rules

Page Name	Object Name	Navigation	Usage
Dynamic Class Dates	DYN_CLASS_DATA_TBL	• Design Student Administration, Design Academic Structure, Setup, Dynamic Class Dates • Manage Student Records, Establish Courses, Setup, Dynamic Class Dates Table	Establish dynamic class date rules and OEE dynamic date rules for your academic institution. Each rule contains numerous sections that correspond to landmark dates on an academic calendar. For each section of a rule, define the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process and the enrollment engine use to calculate deadlines for the corresponding landmark dates of a dynamic academic calendar.

Establishing Dynamic Class Date Rules

Access the Dynamic Class Dates page.



Dynamic Class Dates page

Use for OEE (use for open entry/exit)

Select to make this dynamic class date rule applicable *only* to open entry/exit (OEE) class sections, which further distinguishes this rule as an OEE dynamic date rule. Clear this check box to make this dynamic class date rule applicable only to regular dynamically dated class sections. Depending on your selection, the dates for which you must define rules, rounding schemes, and factors vary to meet your needs, as do the translate values for the Rule and Rounding Scheme fields. You *must* select a value for this check box prior to defining rule schemes, rounding schemes, and factors.

Drop Dates

In the Drop Dates group box, select the rule scheme, rounding scheme, and factors that the Dynamic Dates process (SRDYNADT and SRPCDYNP) uses to calculate the drop deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the drop-and-retain-record deadline and the grade for the drop-with-penalty deadlines according to the student’s primary academic program. Define reason codes and grades for drops by academic program on the Dynamic Date page of the Academic Program Table component.

Census Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the census date for classes or OEE enrollments to which this rule applies. The census date is the official cutoff date for census statistics.

Lapse Start Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the lapse start date for classes or OEE enrollments to which this rule applies. The lapse start date is the first date that a student's grade will lapse. This date determines when the grade lapse rules go into effect for students.

Sixty Percent Point In Time

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the sixty percent point in time for classes or OEE enrollments to which this rule applies. The sixty-percent point in time is the date that you consider the class or OEE enrollment to be sixty percent complete. The system uses this date when computing refunds. In the United States, the majority of academic institutions stop issuing refunds at this point in time.

Last Wait List Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the last wait list date for classes to which this rule applies. The last wait list date is the final date on which the enrollment engine assigns a student to a wait list if the class is full and you have selected the Wait List Okay check box on the enrollment processing page. Wait lists do not apply to OEE enrollments. Therefore, this field is unavailable when you are defining OEE dynamic date rules.

Cancel & Withdrawal Dates

Select the rule scheme, rounding scheme, and cancel factor that the Dynamic Class Dates process uses to calculate the cancel and withdrawal date deadlines for classes or OEE enrollments to which this rule applies. The process assigns the reason code for the cancellation, and the grade for the withdraw-with-penalty deadlines, according to the student's academic program. Define reason codes and grades for withdrawals by academic program on the Dynamic Dates page of the Academic Program Table component.

Fully Graded Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the date that the system considers a student fully graded for classes or OEE enrollments to which this rule applies. This field is optional. When you define transcript types you can indicate on the Transcript Type - Basic Data page whether the transcript processes should obey this date and display grades for classes within the term.

First Date to Enroll / Last Date to Enroll

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the first/last date that a student can enroll in a class to which this rule applies. The enrollment engine uses this date to determine the first/last date that a student can enroll in a class with this particular rule. This field is optional. However, if you provide a first/last date to enroll, the enrollment engine enforces the date that you enter. This field does not apply to OEE enrollments and is therefore unavailable when you are defining OEE dynamic date rules. Define the OEE first date to enroll on the Session Table page.

Class End Date

Select the rule scheme, rounding scheme, and factor that the Dynamic Class Dates process uses to calculate the end date of a class for OEE enrollments to which this rule applies. This field is unavailable for when you are defining OEE dynamic date rules.

See Also

Chapter 8, "Defining Traditional Academic Calendars," Setting Up Session Drop Dates , page 121

Chapter 8, "Defining Traditional Academic Calendars," Setting Up Session Cancellation and Withdrawal Dates, page 119

Setting Up Dynamic Class Dates

After you create your dynamic class date rules, you must set up the Dynamic Class Dates feature within your academic structure so that you can create dynamic academic calendars.

To set up the Dynamic Class Dates feature:

1. On the Academic Career Table page, indicate, in the Allow OEE Enrollment field, whether you want to permit the scheduling of open entry/exit (OEE) class sections, by default, for all course offerings that you tie to an academic career.

   See Chapter 6, "Designing Your Academic Structure," Defining Academic Careers, page 81.

   See Chapter 6, "Designing Your Academic Structure," Describing Academic Career Parameters, page 83.

2. On the Academic Career Table 2 page, select the Use Dynamic Class Dates check box to make available the Dynamic Date page of the Academic Program Table component, which you use to set up your reasons and penalties for canceling, withdrawing from, and dropping dynamically dated classes.

   If you want to define a default dynamic class date rule for courses within the academic career, select the rule in the Dynamic Class Date Rule field. If you want to define a default OEE dynamic class date rule for the courses within the academic career, select the rule in the OEE Dynamic Date Rule field.

   See Chapter 6, "Designing Your Academic Structure," Setting Additional Academic Career Parameters, page 84.

3. On the Program 1 page of the Academic Program Table component, indicate, in the Allow OEE Enrollment field, whether you want to permit open entry/exit (OEE) enrollment for students within a specific academic program.

   See Chapter 10, "Defining Programs, Plans, and Subplans," Describing Academic Programs, page 151.

4. On the Dynamic Date page of the Academic Program Table component, set up dynamic date fields for a specific academic program.

   This page is available only if you enable the Dynamic Class Dates features on the Academic Career Table 2 page. For students within an academic program to be able to drop or withdraw from open entry/exit classes, you must define the values on the Academic Program - Dynamic Date page.

   See Chapter 10, "Defining Programs, Plans, and Subplans," Setting Up Dynamic Date Fields for Academic Programs, page 163.

5. On the Term Table page, indicate, in the Use Dynamic Class Dates check box, whether you want to enable the Dynamic Class Dates feature for all sessions within a term.

   See Chapter 7, "Establishing Terms and Sessions," Defining Terms, page 108.

6. On the Session Table page, select the Use Dynamic Class Dates check box to enable the Dynamic Class Dates feature for all classes that you schedule within a session.

   If you want to schedule open entry/exit class sections for a course within a given academic institution, academic career, and term combination, then you must define, in the Session field, one OEE session per combination.

   See Chapter 7, "Establishing Terms and Sessions," Defining Sessions, page 110.

7. On the Offerings page of the Course Catalog component, select, in the Dynamic Class Date Rule field, the rule that you want the Dynamic Class Dates process (SRPCDYNP) to assign, by default, to all class sections of the course offering that you schedule.

   If you want to enable students to enroll in OEE class sections of a course offering, select the Allow OEE Enrollment check box. The OEE Dynamic Date Rule field becomes available. Then select an OEE dynamic date rule to have the system assign that rule, by default, to all OEE class sections of the course offering that you schedule. If you have assigned a dynamic class date rule or an OEE dynamic date rule on the Academic Career Table 2 page, the system migrates the value to the corresponding field on the Course Catalog - Offerings page when you create a new course catalog record.

   See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Setting Up the Course Catalog," Defining Course Offerings.

8. On the Components page of the Course Catalog component, select the Primary Component check box to indicate the primary component of the course offering.

   Also indicate the additional components that you want the Dynamic Class Dates process to include in its calculations by selecting the Include In Dynamic Date Calc (include in dynamic date calculations) check box for the component.

   See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Setting Up the Course Catalog," Defining Course Components.

9. On the Basic Data page of the Schedule New Course component, select the Include In Dynamic Date Calc check box to also include a non-primary component of the class section in the Dynamic Class Dates process calculations.

   If you want to schedule open entry/exit class sections, you must select *OEE* in the Session field. Finish scheduling the class.

   See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Managing the Schedule of Classes," Defining Basic Data for Class Sections.

10. On the Class Components page of the Class Associations component, select, in the Primary Component field, the primary component for the class you are scheduling.

    Use the Class Associations component only if you are changing the primary component for that term because the system migrates the primary component from the Course Catalog - Components page.

    See *PeopleSoft 8 SP1 Student Records PeopleBook*, "Managing the Schedule of Classes," Modifying Class Components.

Once you complete the setup for the Dynamic Class Dates feature, you are ready to dynamically calculate the academic calendar landmark dates for these classes.

Creating Dynamic Academic Calendars by Term

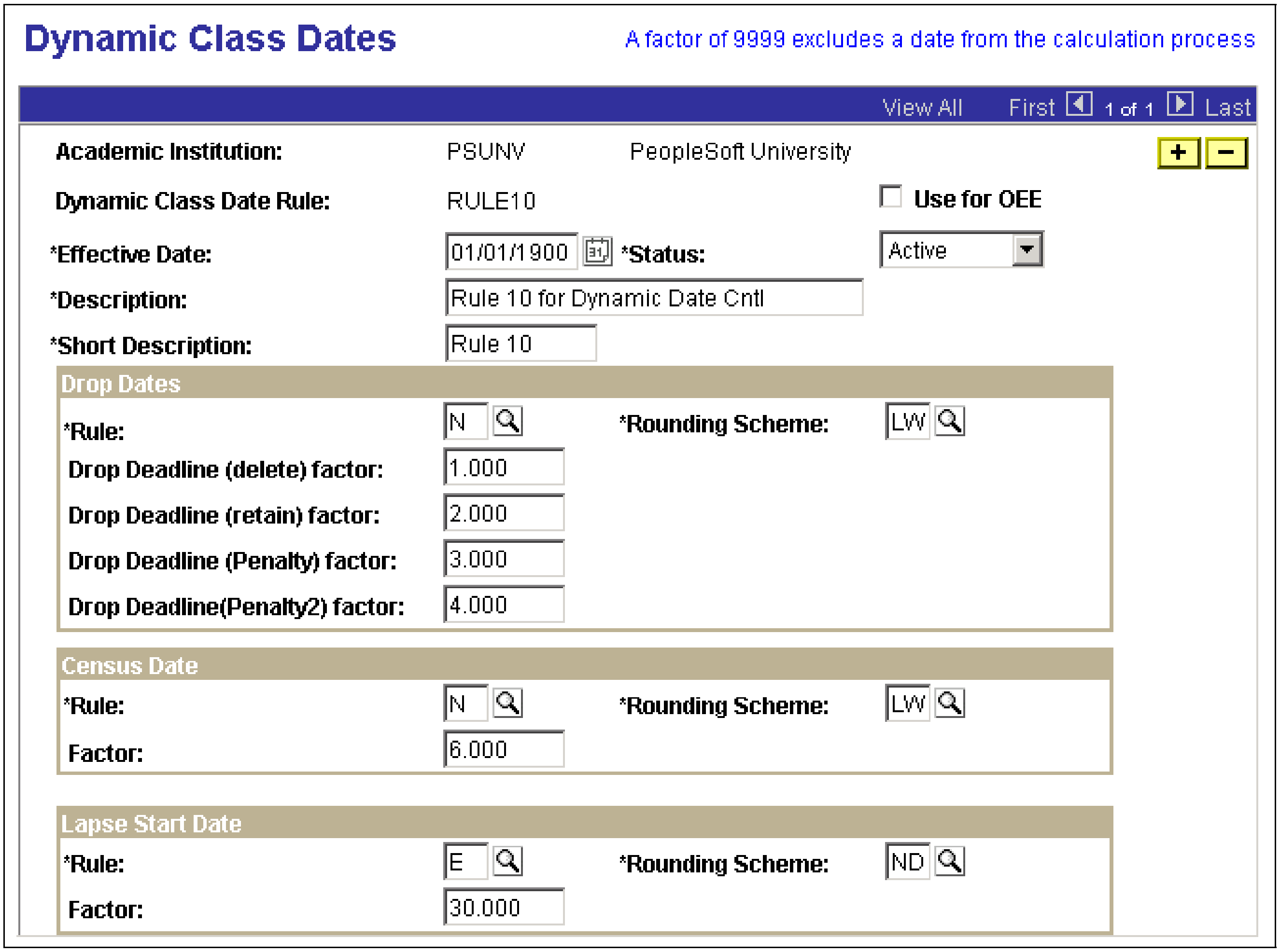
This section discusses how to calculate dynamic academic calendars by term.

Page Used to Calculate Dynamic Academic Calendars by Term

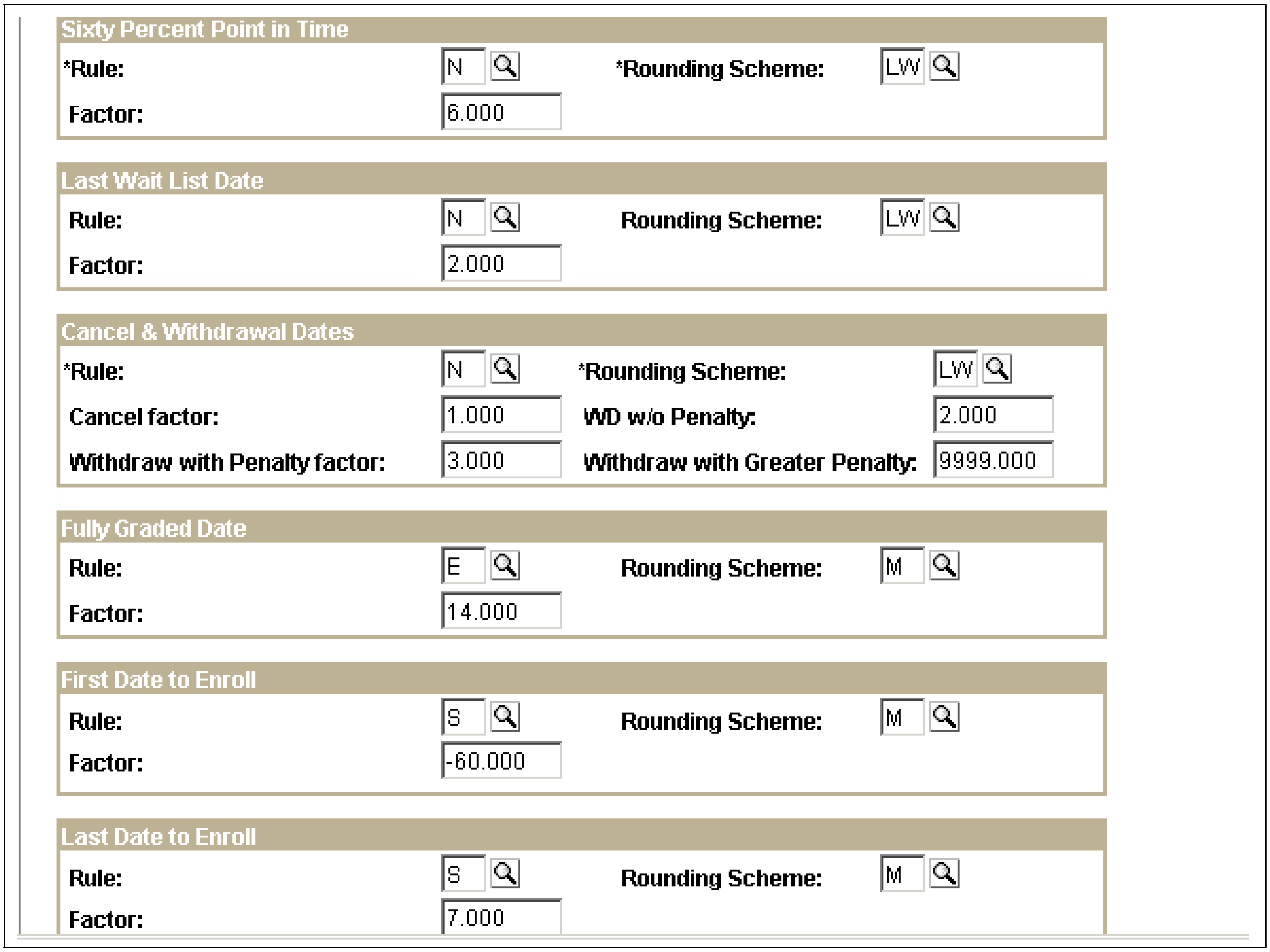
Page Name	Object Name	Navigation	Usage
Dynamic Class Dates	RUNCTL_SRPCDYNP	Manage Student Records, Establish Courses, Process, Dynamic Class Dates	Calculate dynamically the academic calendar deadlines for class sections that you have scheduled for a term.

Calculating Dynamic Academic Calendars by Term

Access the Dynamic Class Dates page.



Dynamic Class Dates page (page 1 of 2)



Dynamic Class Dates page (page 2of 2)

Use the fields in the grid at the lower portion of this page to select the criteria that you want the Dynamic Class Dates process (SRPCDYNP) to use for determining which class sections to include in its processing. Select as few or as many criteria as necessary to include all the class sections for which to dynamically calculate academic calendar dates. After you calculate the deadlines, you can view, override, and recalculate them on a section-by-section basis on the Dynamic Class Data page of the Dynamic Class Dates component.

Academic Institution Select the academic institution for which you want to run the Dynamic Class Dates process for multiple class sections. The system supplies this value from the User Defaults 1 page. You can override this default value.

Term Select the term that contains the class sections for which you want to run the Dynamic Class Dates process.

Commit Frequency The system supplies a value of *1*. The lower the commit frequency the better concurrence of data. While a higher commit frequency enables faster processing of the job, the job could get tied up with another process. We recommend that you leave the commit frequency at *1*.

Class Nbr (class number) Enter the class number for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules. The system prompts you with the scheduled classes for the specified term and academic institution. After you enter the class number, exit the field and the system populates the values for the remaining selection criteria. If you want to dynamically calculate academic calendar dates for multiple class sections on this row, leave this field blank.

Session
Select the session, within the term and academic institution, for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections. You can modify these translate values. If you want to dynamically calculate academic calendar dates for multiple sessions on this row, leave this field blank.

Academic Organization
Select the academic organization, within the specified academic institution, for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Campus
Select the campus, within the specified academic institution, for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Subject Area
Select the subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections.

Catalog Number From
If you have a specific range of catalog numbers within a subject area for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections, enter the first catalog number in the range.

Catalog Number To
Enter the last catalog number in the range.

Class Start Date From
If you have a specific range of class start dates for which you want to dynamically calculate academic calendar dates and assign OEE dynamic date rules for scheduled class sections, enter the first class start date in the range.

Class Start Date To
Enter the last class start date in the range.

Obey Dynamic Date Calc Required (obey dynamic date calculation required)
Select to have the Dynamic Class Dates process include in its calculations only the components of a scheduled class section within a dynamically dated session for which the system has selected the Dynamic Date Calc Required (dynamic date calculation required) field on the Basic Data page of the schedule of classes. The system automatically selects this field whenever you change the class meeting pattern for a component of a scheduled class section. Clear this check box to have the system calculate academic calendar dates and assign OEE dynamic date rules for all scheduled class sections.

Run
Click to run this request. PeopleSoft Process Scheduler runs the Dynamic Class Dates COBOL/SQL process (SRPCDYNP) at user-defined intervals. You can also select to run the Dynamic Class Dates SQR report (SRDYNADT), or the Dynamic Class Dates multiprocess job, which consists of both the COBOL/SQL process and the SQR report. After the COBOL/SQL process finishes, the system makes the rows that you included in the run request unavailable for edit but still displays these rows so that you can review the processing parameters of your run. These rows have no impact on future processing.

Managing Dynamic Academic Calendars for Class Sections

If you have attached the dynamic class date rule directly to the course offering, the Dynamic Class Dates process (SRPCDYNP) uses that rule every time that you run the process for a scheduled class section of that course offering. Although this ensures consistency and eases maintenance, you might want to apply rules directly to each class section, change the course offering default rule for specific class sections, or manually enter a deadline for a dynamic academic calendar date. You can use the Dynamic Class Dates component under the Use menu to accomplish these tasks and more. Through this component, you can also view the class meeting patterns of class sections and Dynamic Class Date process messages.

This section discusses how to do the following tasks for class sections with dynamic academic calendars:

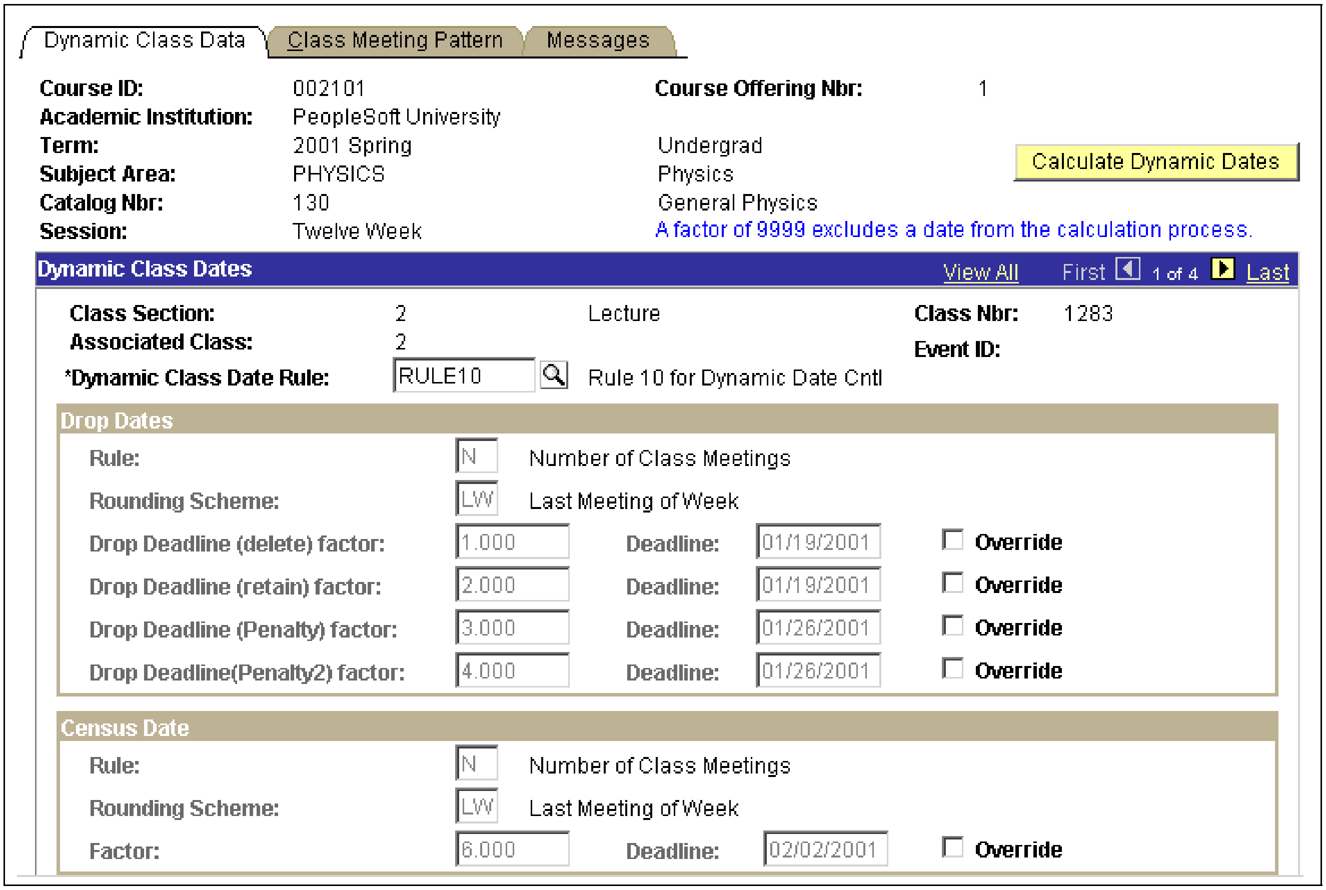
- Calculate, view, and override dynamic academic calendar dates.
- View class meeting patterns.
- View dynamic class date process messages.

Pages Used to Manage Dynamic Academic Calendars for Class Sections

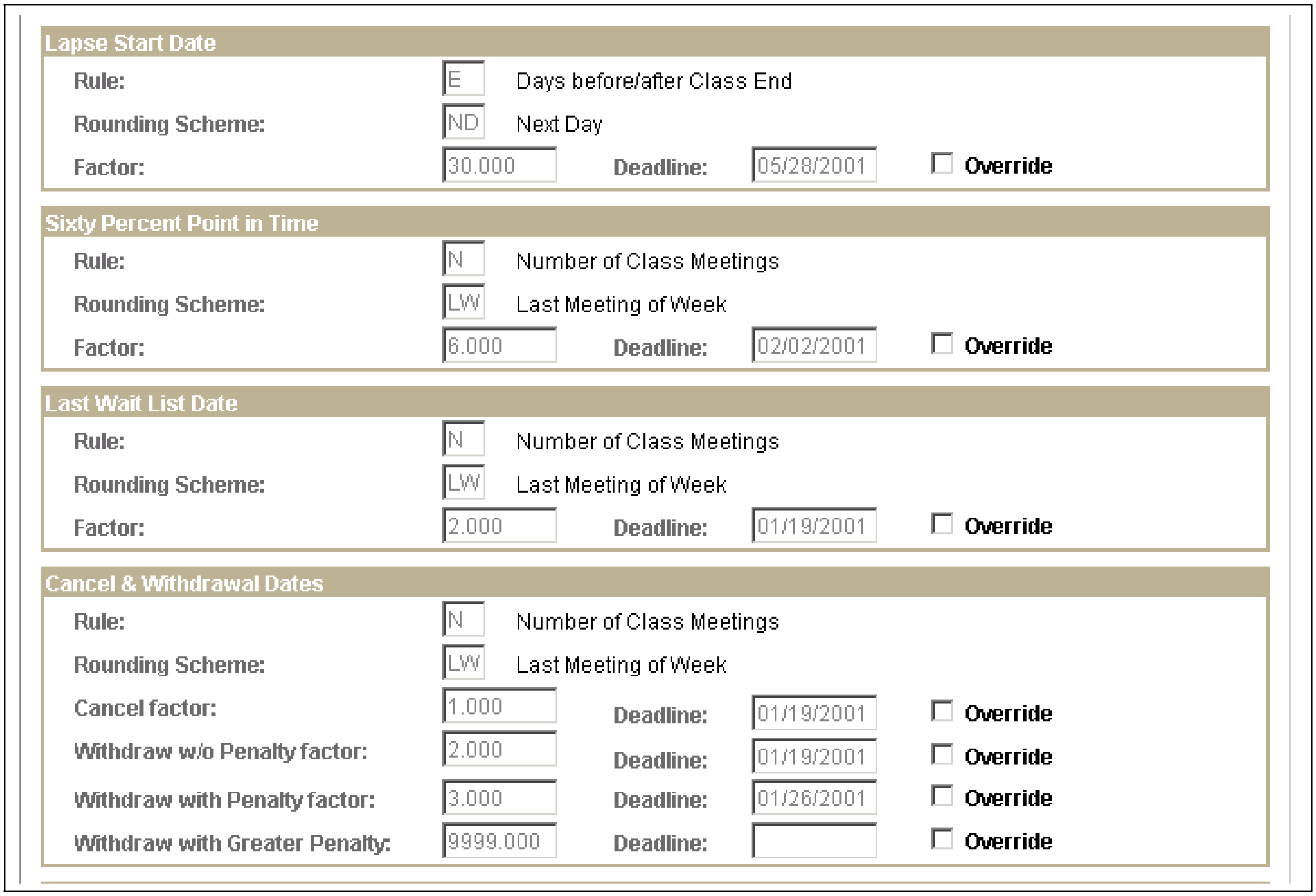
Page Name	Object Name	Navigation	Usage
Dynamic Class Data	DYN_CLASS_DATA1	Manage Student Records, Establish Courses, Use, Dynamic Class Dates, Dynamic Class Data	Run the Dynamic Class Dates process (SRPCDYNP) for a class section, or view and override the calculated results.
Class Meeting Pattern	DYN_CLASS_MTG_PAT	Manage Student Records, Establish Courses, Use, Dynamic Class Dates, Class Meeting Pattern	View the class meeting pattern of the class section for which you dynamically calculate academic calendar dates.
Messages	DYN_CLASS_DATA_MSG	Manage Student Records, Establish Courses, Use, Dynamic Class Dates, Messages	View the Dynamic Class Date process (SRPCDYNP) status and messages related to each class section for which you have dynamically calculated academic calendar dates.

Calculating, Viewing, and Overriding Dynamic Academic Calendar Dates

Access the Dynamic Class Data page.



Dynamic Class Data page (1 of 3)



Lapse Start Date

Rule:	E	Days before/after Class End		
Rounding Scheme:	ND	Next Day		
Factor:	30.000	Deadline:	05/28/2001	Override

Sixty Percent Point in Time

Rule:	N	Number of Class Meetings		
Rounding Scheme:	LW	Last Meeting of Week		
Factor:	6.000	Deadline:	02/02/2001	Override

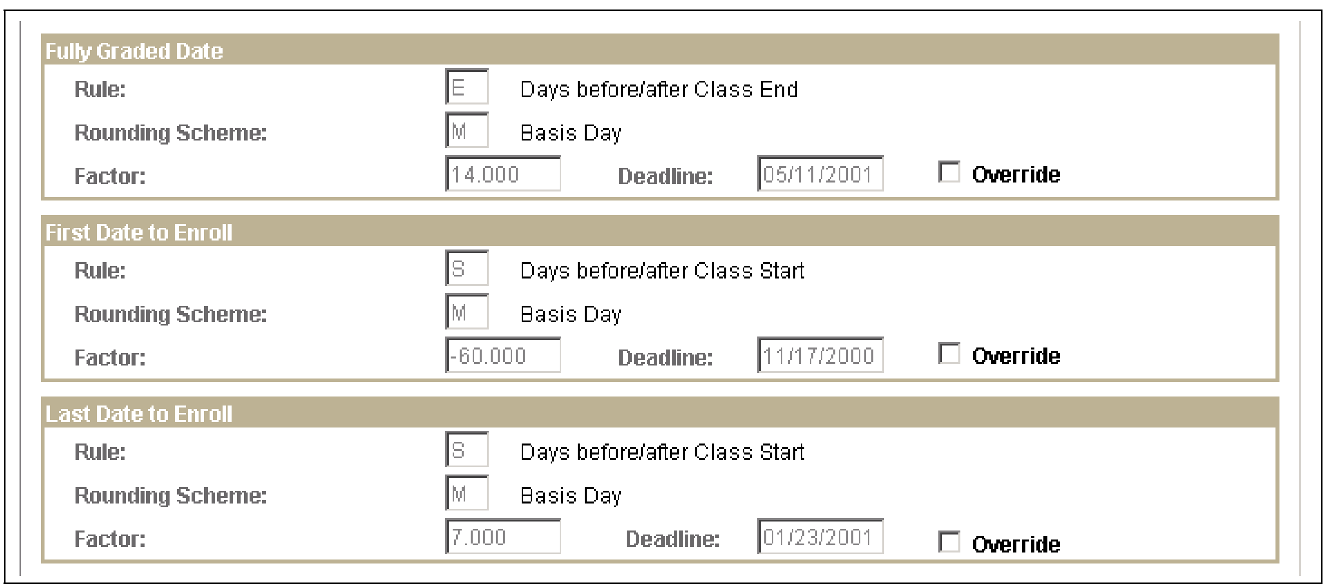
Last Wait List Date

Rule:	N	Number of Class Meetings		
Rounding Scheme:	LW	Last Meeting of Week		
Factor:	2.000	Deadline:	01/19/2001	Override

Cancel & Withdrawal Dates

Rule:	N	Number of Class Meetings		
Rounding Scheme:	LW	Last Meeting of Week		
Cancel factor:	1.000	Deadline:	01/19/2001	Override
Withdraw w/o Penalty factor:	2.000	Deadline:	01/19/2001	Override
Withdraw with Penalty factor:	3.000	Deadline:	01/26/2001	Override
Withdraw with Greater Penalty:	9999.000	Deadline:		Override

Dynamic Class Data page (2 of 3)



Fully Graded Date

Rule:	E	Days before/after Class End		
Rounding Scheme:	M	Basis Day		
Factor:	14.000	Deadline:	05/11/2001	Override

First Date to Enroll

Rule:	S	Days before/after Class Start		
Rounding Scheme:	M	Basis Day		
Factor:	-60.000	Deadline:	11/17/2000	Override

Last Date to Enroll

Rule:	S	Days before/after Class Start		
Rounding Scheme:	M	Basis Day		
Factor:	7.000	Deadline:	01/23/2001	Override

Dynamic Class Data page (3 of 3)

Each time that you run the Dynamic Class Dates process, the process displays, on this page, the rule scheme, rounding scheme, and factor of each academic calendar date found in the rule. Additionally, for non-OEE dynamic date sections, the process calculates and displays deadline dates. After you run the Dynamic Class Dates process, you can use this page to override the calculated deadlines. You can also use this page to attach a different rule to a class section and rerun the Dynamic Class Dates process.

Note. Assign a factor of 9999 to exclude a date from the calculation process.

Event ID

The event ID that the system automatically associates with the section when you schedule the class.

Dynamic Class Date Rule

The Dynamic Class Dates process attaches a dynamic class date rule to the primary component of a class. Select the dynamic class date rule that you want to apply to each primary component class section when you run the Dynamic Class Dates process. Click the Calculate Dynamic Dates button to run the Dynamic Class Dates process. If you leave this field blank, then click the Calculate Dynamic Dates button to run the process, the process assigns the rule that you specified on the Offerings page to each corresponding primary component class section. If you have already run the process through the Dynamic Class Dates process page, the system displays, in this field, the rule that the process used to dynamically calculate the academic calendar dates. You can apply a different rule, as necessary, to a class section and rerun the process.

Calculate Dynamic Dates

Click to run the Dynamic Class Dates process. The process dynamically calculates the academic calendar deadlines based on the rule that you have attached to the primary component class sections, either in the Dynamic Class Date Rule field on this page or the corresponding field on the Offerings page. The process displays the calculated deadlines for each landmark date on this page. If you make changes to the rule that applies to a class section after you have run the Dynamic Class Dates process, you must rerun the process to update these deadlines.

For OEE class sections, the process assigns and displays the associated rules, rounding schemes and factors based on the rule that you have attached to a primary component class section, either in the Dynamic Class Date Rule field on this page or the corresponding field on the Offerings page. The system calculates deadlines for OEE class during enrollment processing.

Note. You can click this button as many times as necessary to have the Dynamic Class Dates feature calculate and recalculate your landmark date deadlines.

Deadline and **Override**

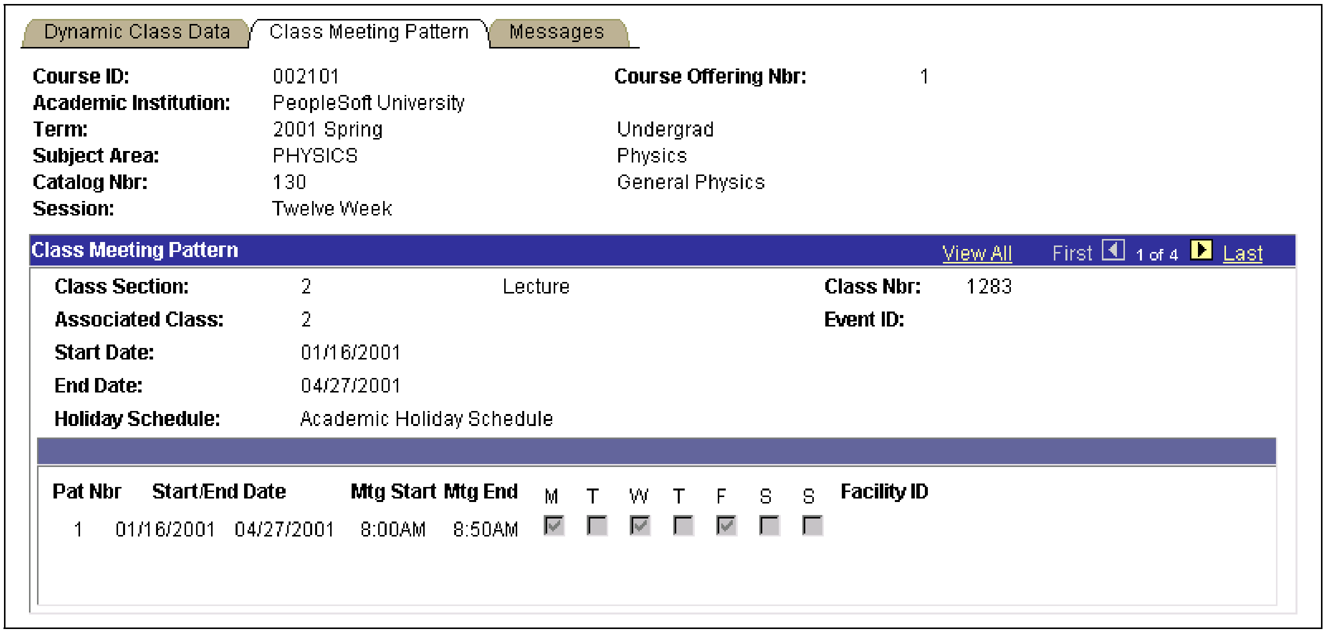
The Dynamic Class Dates process displays the dynamically calculated deadline for the corresponding landmark date according to the dynamic class date rule that you applied to the class section. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline. The system calculates deadlines for OEE class during enrollment processing.

See Also

Chapter 9, “Defining Dynamic Academic Calendars,” Creating Dynamic Class Date Rules, page 131

Viewing Class Meeting Patterns

Access the Class Meeting Pattern page.



Class Meeting Pattern page

The system displays the start and end date of the class section, plus class meeting pattern detail for all sections scheduled within a dynamic date or OEE session. If you already calculated deadlines for the class section, this data will help you determine if the calculated deadlines are appropriate or whether you need to override the deadlines or apply a different rule to the class section.

Holiday Schedule	The holiday schedule for the class section.
Pat Nbr (pattern number)	The sequence number that identifies the class meeting pattern of the section. The first row always indicates the class meeting pattern of the primary class component. Subsequent rows indicate additional class meeting patterns for a particular class section.
Start/End Date	The start and end dates of the class component.
Mtg Start (meeting start) and **Mtg End** (meeting end)	The meeting start and end time of the class component.
M T W T F S S (days of the week)	The days of the week that the class component meets.
Facility ID	Indicates where the class component meets.

Viewing Dynamic Class Date Process Messages

Access the Messages page.

If the Dynamic Class Dates process encounters any difficulties when it calculates the deadlines for the class section, it writes a message to the message log and displays that message on this page. Use these messages to troubleshoot the problem.

Status	The system displays the status of the process run.

Message Text	The system displays any text written to the message log that relates to the process run.
Severity	The severity of the message written to the message log that relates to the process run.
Set	The message catalog set to which the message belongs.
Message Number	The message number that identifies the message within the set to which it belongs in the message catalog.

Managing Dynamic Academic Calendars for OEE Enrollments

If you have set up your academic structure such that a student can enroll in an open entry/exit (OEE) class, the enrollment engine runs the Dynamic Class Dates process (SRPCDYNP) at enrollment time for each student that enrolls in an OEE class section. The Dynamic Class Dates process uses the OEE dynamic date rule that you have associated with the class to calculate the deadlines. The process then stores these dynamically calculated deadlines for the student's OEE enrollment in the STDNT_ENROLL_OEE table. To view and override these deadlines, use the Student OEE Enroll Data page.

This section discusses how to view and override dynamic academic calendar dates for OEE enrollments.

Page Used to Manage Dynamic Academic Calendars for OEE Enrollments

Page Name	Object Name	Navigation	Usage
Student OEE Enroll Data (student open entry/exit enroll data)	OEE_ENRL_DATES	Manage Student Records, Manage Academic Records, Use, Student OEE Enroll Data	View and override the academic calendar date deadlines that the Dynamic Class Dates process (SRPCDYNP) calculates for a student's open entry/exit (OEE) enrollment.

Viewing and Overriding Dynamic Academic Calendar Dates for OEE Enrollments

Access the Student OEE Enroll Data page.

Student OEE Enroll Data

ID:	SR12204	Madsen,Douglas		
Academic Career:	UGRD	Undergraduate		
Academic Institution:	PSUNV	PeopleSoft University		
Term:	0430	2001 Spring		
Class Nbr:	1303	PSYCH 495	**Sect:**	10
Student Enrollment Status:	Enrolled			
Start Date:	01/20/2001			
Dynamic Class Data Rule:	OEE15WK-1	OEE 15 Week Schedule		

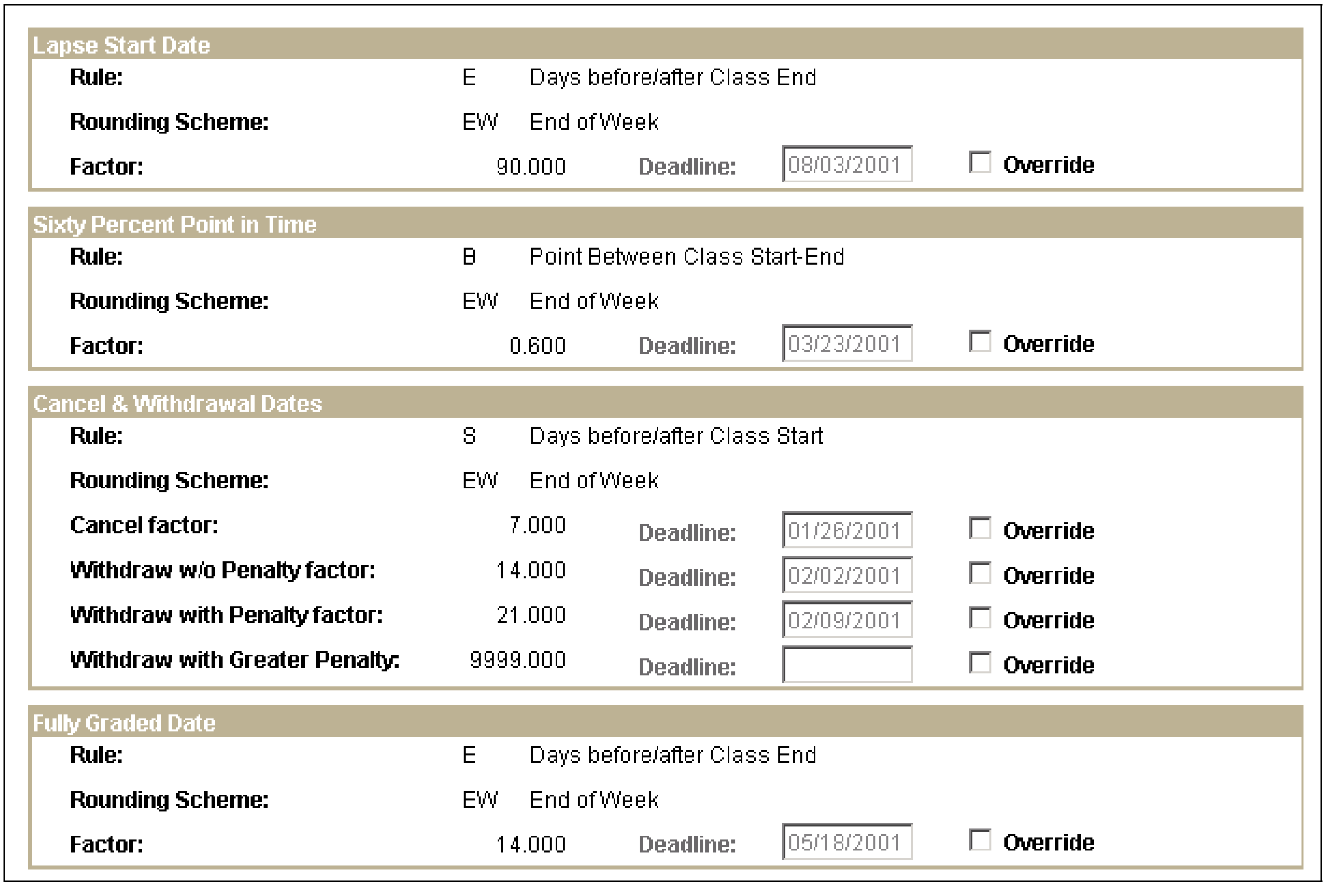
Drop Dates

Rule:	S	Days before/after Class Start		
Rounding Scheme:	EW	End of Week		
Drop Deadline (delete) factor:	7.000	**Deadline:**	01/26/2001	☐ **Override**
Drop Deadline (retain) factor:	14.000	**Deadline:**	02/02/2001	☐ **Override**
Drop Deadline (Penalty) factor:	21.000	**Deadline:**	02/09/2001	☐ **Override**
Drop Deadline(Penalty2) factor:	9999.000	**Deadline:**		☐ **Override**

Census Date

Rule:	B	Point Between Class Start-End		
Rounding Scheme:	EW	End of Week		
Factor:	0.200	**Deadline:**	02/09/2001	☐ **Override**

Student OEE Enroll Data page (1 of 3)



Lapse Start Date

Rule: E Days before/after Class End
Rounding Scheme: EW End of Week
Factor: 90.000 Deadline: 08/03/2001 Override

Sixty Percent Point in Time

Rule: B Point Between Class Start-End
Rounding Scheme: EW End of Week
Factor: 0.600 Deadline: 03/23/2001 Override

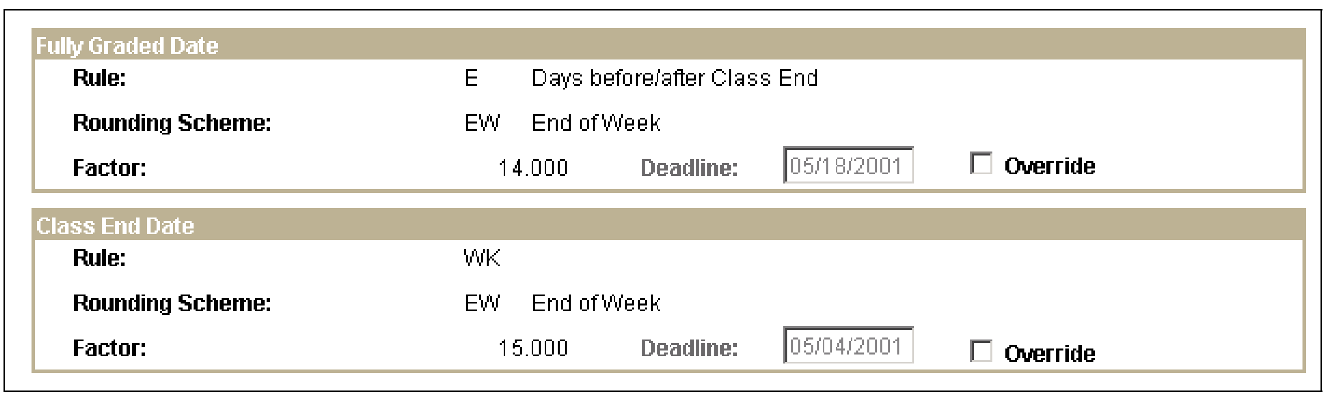
Cancel & Withdrawal Dates

Rule: S Days before/after Class Start
Rounding Scheme: EW End of Week
Cancel factor: 7.000 Deadline: 01/26/2001 Override
Withdraw w/o Penalty factor: 14.000 Deadline: 02/02/2001 Override
Withdraw with Penalty factor: 21.000 Deadline: 02/09/2001 Override
Withdraw with Greater Penalty: 9999.000 Deadline: Override

Fully Graded Date

Rule: E Days before/after Class End
Rounding Scheme: EW End of Week
Factor: 14.000 Deadline: 05/18/2001 Override

Student OEE Enroll Data page (2 of 3)



Fully Graded Date

Rule: E Days before/after Class End
Rounding Scheme: EW End of Week
Factor: 14.000 Deadline: 05/18/2001 Override

Class End Date

Rule: WK
Rounding Scheme: EW End of Week
Factor: 15.000 Deadline: 05/04/2001 Override

Student OEE Enroll Data page (3 of 3)

The Dynamic Class Dates process calculates these deadlines based on the start date of the student's enrollment, which is specified at enrollment time. The Dynamic Class Dates process displays, on this page, the rule scheme, rounding scheme, and factor of each academic calendar date found in the rule, plus the calculated deadline.

Start Date The date that the student started her or his enrollment in the OEE class. This is the date that drives the Dynamic Class Dates process calculations for OEE enrollments.

Dynamic Class Date Rule The rule that the Dynamic Class Dates process applied to this class when the student enrolled in the class. If you ran the Dynamic Class Date process, which assigned a rule to the primary component of the OEE class, or if you assigned a rule to the class on the Dynamic Class Dates page, then the enrollment engine used that rule to calculate the deadlines for the landmark dates of the dynamic academic calendar. Otherwise, the enrollment engine used the OEE dynamic date rule, specified on the Offerings page, in its calculations.

Deadline and **Override**	The Dynamic Class Dates process displays the deadline for the corresponding landmark date, calculated according to the dynamic class date rule that you have applied to the class. If you select the corresponding Override check box, this field becomes available so that you can manually enter a new deadline.

See Also

Chapter 9, “Defining Dynamic Academic Calendars,” Creating Dynamic Class Date Rules, page 131

CHAPTER 10

Defining Programs, Plans, and Subplans

This chapter lists common elements and discusses how to:

- Define academic programs.
- Define academic plans.
- Define academic subplans.

Common Element Used in This Chapter

Transcript Level	Select a transcript level, to determine the types of transcripts on which the system includes the specified data. Values are: *Not Print, Official, Unofficial, Stdnt Life* (student life), and *Degr Prog* (degree progress).

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Producing Transcripts," Processing Transcripts for an Individual Student or Small Group of Students

Defining Academic Programs

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

- Describe academic programs.
- Set up defaults for academic programs.
- Set up academic standing parameters for academic programs.
- Set up honor and award parameters for academic programs.
- Establish academic organization ownership for academic programs.
- Set taxonomy and repeat checking options for academic programs.
- Define campuses and business units for academic programs.
- Define grade lapse rules for academic programs.
- Set up term enrollment limits for academic programs.
- Set up session enrollment limits for academic programs.

- Set up course count limits for academic programs.
- Set up dynamic date fields for academic programs.

Understanding Academic Programs

An academic program is the entity that a student applies to, is admitted to, and graduates from. For instance, at a four-year liberal arts college, the academic program is liberal arts undergraduate. At a larger university with a college of fine arts, a school of engineering, and a college of arts and sciences, the academic programs represent these broad categories. At a graduate school, there can be a distinct academic program for every area of study, such as Ph.D. in mathematics, and Ph.D. in molecular biology. At the student level, academic programs are a major controlling variable. Academic programs control the student's academic level, academic load, academic calendar, academic group (for tuition calculation purposes), grading scheme, and admissions evaluation scheme. Once you establish your academic programs, you can create academic plans (which are a subdivision of academic programs) and academic subplans (which are a subdivision of academic plans).

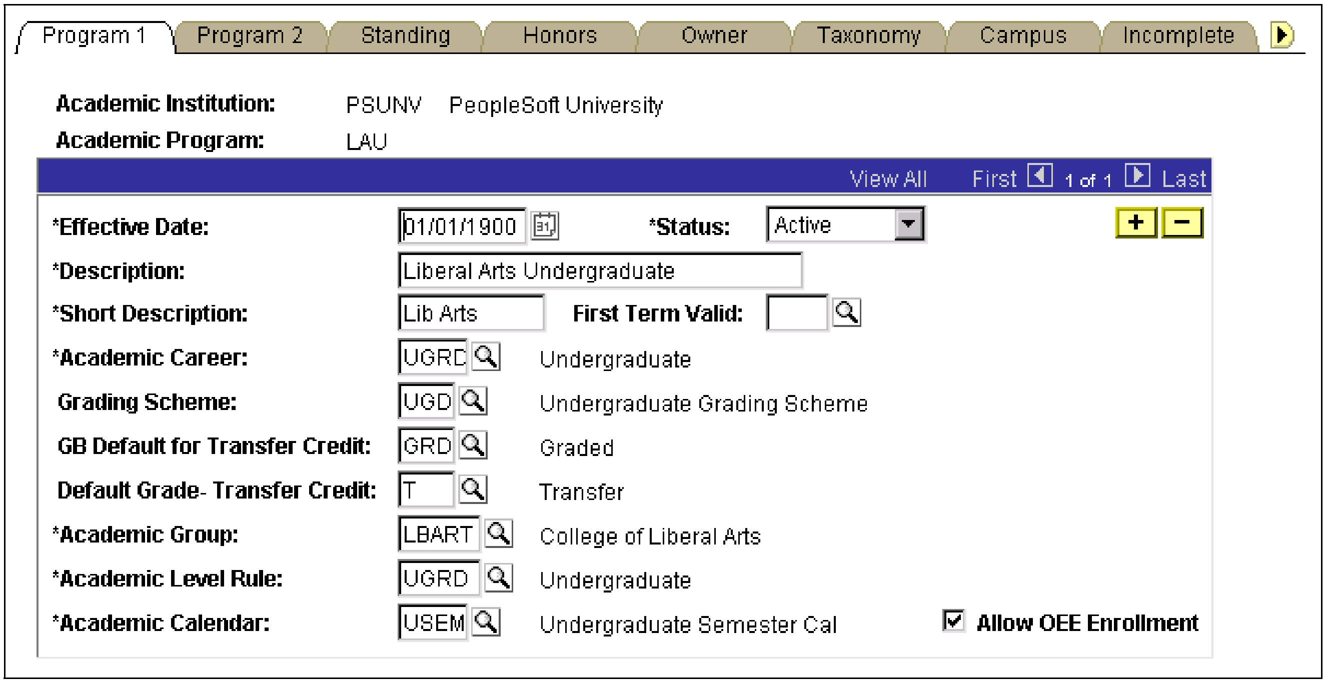
Pages Used to Define Academic Programs

Page Name	Object Name	Navigation	Usage
Program 1	ACADEMIC_PROG_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Program 1	Describe every academic program at an academic institution and link each academic program to an academic career, grading scheme, academic group, academic level rule, and academic calendar.
Program 2	ACADEMIC_PROG_TBL2	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Program 2	Set up defaults and other parameters for academic programs.
Standing	ACAD_PROG_STDG_ TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Standing	Set up academic standing rules and parameters for academic programs.
Honors	ACAD_PROG_HNRS_ TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Honors	Set up honor and award rules and parameters for academic programs.
Owner	ACAD_PROG_OWNR_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Owner	Establish academic organization owners of the academic program for reporting, analysis, and work distribution purposes.

Page Name	Object Name	Navigation	Usage
Taxonomy	ACAD_PROG_TAXONOMY	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Taxonomy	Set repeat checking controls at the academic program level and link repeat rules to academic programs. Also, link academic programs to Classification on International Programs (CIP) codes and Higher Education General Information Survey (HEGIS) codes.
Campus	HOME_CAMPUS_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Campus	Define the home campus and business unit for academic programs and the valid campuses for financial aid, registration, and advisement.
Incomplete	INCOMPLETE_GRADE	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Incomplete	Define grade lapse rules for academic programs. Each rule defines the grade that your incomplete grades lapse to when you run the report and what related transcript notes (if any) appear on a student's transcript.
Enrollment	ENRL_LIMITS_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Enrollment	Set up class enrollment limits for students' academic programs, according to term categories.
Session	SESSN_ENRL_LIM_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Session	Set up class enrollment limits for students' academic programs, according to sessions.
Course	CRSE_COUNT_LIMITS	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Course	Set up students' enrollment limits for courses in a specified term category and session type within academic programs.
Dynamic Date	ACAD_PROG_DYN_DATE	Design Student Administration, Design Academic Structure, Setup, Academic Program Table, Dynamic Date	Set up dynamic date fields for a specific academic program.

Describing Academic Programs

Access the Program 1 page.



Program 1 page

For Online Analytical Processing (OLAP) purposes, it is important to carefully consider the code that you assign to each academic program. When you design OLAP cubes for PowerPlay (a third-party application delivered with your PeopleSoft system), avoid having the same code for more than one dimension of your cube. For example, you do not want to use the same code, such as LAU, for both an academic career and academic program.

First Term Valid

Select the first term in which students can be admitted to the academic program. You cannot admit students to the academic program prior to the term that you specify. If you select term *0000,* you can admit students to the program for any term. When you convert data to your PeopleSoft system, be sure that you select, for each academic program, a first valid term that is appropriate for the preexisting data of the academic program. This field is optional.

Academic Career

Select the academic career to which the academic program belongs.

Grading Scheme

Displays the grading scheme of the academic career by default. Select a new value if you want to override the default value. This grading scheme defines all of the valid grading bases of this academic program. The system applies this grading scheme to classes within this academic program. In addition, the system displays the grading scheme of the academic program in the equivalent fields throughout transfer credit processing whenever there is credit transferred into that academic program. When the system converts transfer credit, it uses the grading basis of the lowest definable level.

GB Default for Transfer Credit (grading basis default for transfer credit)

Displays the transfer credit default grading basis of the academic career (as defined on the Academic Career Table page) by default. Select a new value to override the default value. This grading basis appears on various pages throughout transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grading basis of the lowest definable level.

Default Grade- Transfer Credit	Displays the transfer credit default grade of the academic career by default. Select a new value to override the default value. This grade appears on various pages throughout transfer credit processing, where you can also override the value. When the system converts transfer credit, it uses the grade of the lowest definable level.
Academic Group	Select the academic group to which this academic program belongs. PeopleSoft Student Financials uses academic groups for tuition calculation. The academic group value does not indicate sole ownership of the academic program by the academic group. Define ownership for reporting and financial analysis purposes on the Owner page of this component.
Academic Level Rule	Select the academic level rule for this academic program. This rule defines how the system calculates the academic level for students who are in the academic program.
Academic Calendar	Select the academic calendar for this academic program. The system uses the academic calendar that you select to determine many of the important dates associated with this academic program.
Allow OEE Enrollment (allow open entry and exit enrollment)	Select to permit students with this academic program to enroll in OEE classes. The system selects this check box by default when you define new academic programs. Clear this check box to prevent students with this academic program from enrolling in OEE classes.

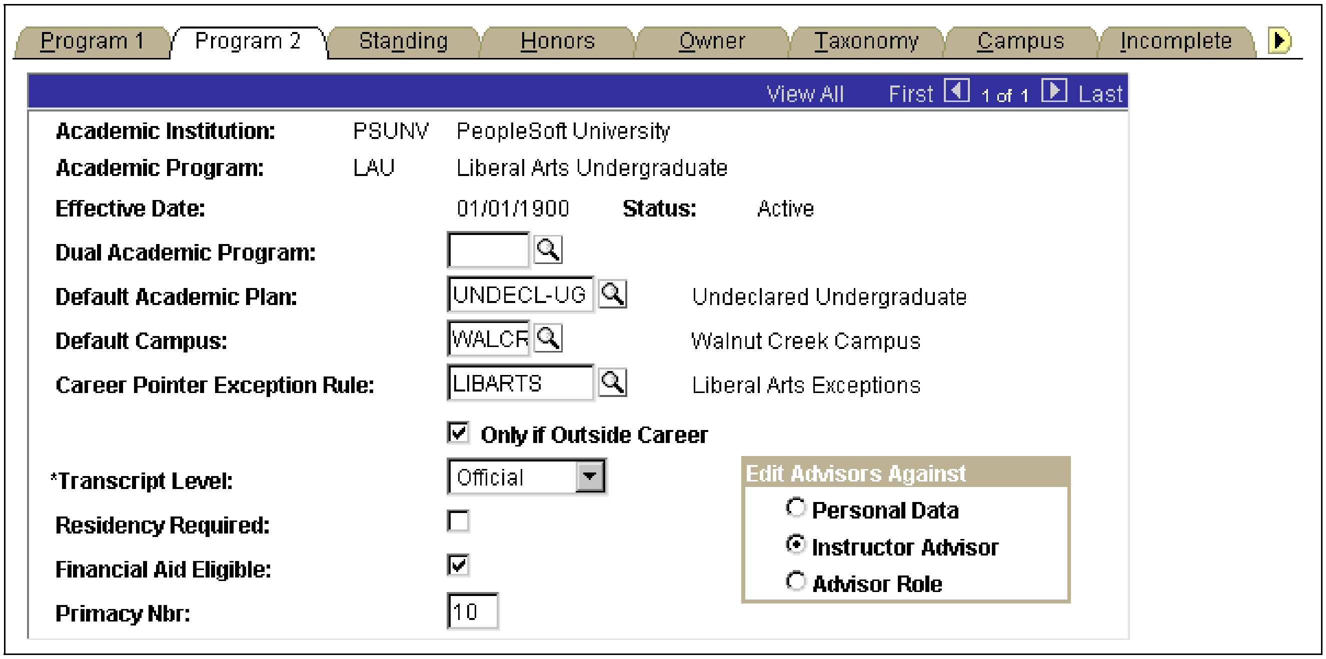
See Also

Chapter 9, “Defining Dynamic Academic Calendars,” page 127

PeopleSoft 8 SP1 Student Records PeopleBook, “Consolidating and Reporting Academic Statistics,” Building OLAP Cubes for Records Analysis

Setting Up Defaults for Academic Programs

Access the Program 2 page.



Program 2 page

Dual Academic Program

Select the second academic program, if the academic program is a joint program (such as JD/MBA). This enables PeopleSoft Recruiting and Admissions to evaluate and accept students into both academic programs with one application.

Default Academic Plan

Select a default academic plan for this academic program. The system uses the value that you select as a default academic plan for new applicants to this academic program, migrating your selection to the Quick Admit, Recruit Prospective Students, and Application Entry pages.

Default Campus

Select the default campus for this academic program. The value that you select appears on the Quick Admit, Recruit Prospective Students, and Application Entry pages for new applicants to this academic program. Define campuses on the Campus Table page.

Career Pointer Exception Rule

Select the career pointer exception rule for this academic program. If this academic program does not have any career exceptions—that is, enrollment in other careers' courses follows the rules on the Academic Career Pointers page—leave this field empty.

Only if Outside Career

Select to use the career pointer exception rules only against class enrollments that are outside the academic career associated with this academic program. Clear this check box to use the career pointer exception rules against all class enrollments in this academic program.

Residency Required

Select to require residency data for students in this academic program. When you attempt to activate a student into a term, the Term Activation process checks whether a student's academic program requires that the student have residency data in the system. If such is the case and the student does not have residency data in the system, the Term Activation process does not activate the student into the term. This blocks the student from class enrollment and tuition calculation.

The value of this check box appears by default, according to your setting of the Residency Required field on the Institution 1 page for the academic institution to which this academic program belongs.

Financial Aid Eligible

Select to indicate that students in this academic program are eligible for financial aid. This check box works in conjunction with the Enforce FA Eligibility (enforce financial aid eligibility) check box on the Statistics Period Type page. The Consolidate Academic Statistics process uses these check boxes to determine which students to include or exclude from its calculations. For example, if this is an academic program within a continuing education or nondegree academic career, and you want to exclude students within this academic program from the process calculations, clear the Financial Aid Eligible check box on this page and select the Enforce FA Eligibility check box on the Statistics Period Type page.

Primacy Nbr (primacy number)

Enter the primacy number for this academic program. The system uses this number as a key to determine a student's primary academic program when you consolidate academic statistics. The system also uses this number to prioritize financial aid applications when students are enrolled in multiple academic programs at the same time. The lowest number takes precedence.

Note. PeopleSoft suggests that you coordinate your numbering with PeopleSoft Financial Aid to avoid conflicts.

Edit Advisors Against

Select the view that the system should use when prompting you to assign an advisor for a student in this academic program. Assign advisors to students on the Student Advisor page. If you are defining a new academic program, the system displays the value from the corresponding field on the Academic Career Table page. The option that you select appears by default on the Student Milestone and Student Advisor pages. Options are:

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

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

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

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Identification Data"

PeopleSoft 8 SP1 Student Records PeopleBook, "Consolidating and Reporting Academic Statistics"

Setting Up Academic Standing Parameters for Academic Programs

Access the Standing page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Managing Students’ Programs, Plans, and Subplans”

Setting Up Honor and Award Parameters for Academic Programs

Access the Honors page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Preparing to Track Student Data,” Linking Honor Award Rules to Academic Programs

Establishing Academic Organization Ownership for Academic Program

Access the Owner page.

Academic Organization (upper)	Select the academic organization that offers courses in this academic program. Any academic organization entered here should also have a detail node associated with it for this academic program on the academic organization tree. Define academic organizations on the academic organization tree.
Split Ownership	Select to designate multiple academic organization owners for this academic program. If you select this option, the lower Academic Organization field and the Percent Owned field become available.
Academic Organization (lower)	Select the academic organization that owns this academic program. Define academic organization values on the academic organization tree in PeopleTools Tree Manager and modify them in the Academic Organization Table component.
Percent Owned	Enter the percentage of the academic program for which the academic organization is responsible. You can have academic organizations with split ownership of the academic program, but the total percent owned between academic organizations must equal *100.*

See Also

Chapter 12, “Securing Your Academic Institution,” Securing Academic Organizations, page 192

PeopleTools: Tree Manager

Setting Taxonomy and Repeat Checking Options for Academic Programs

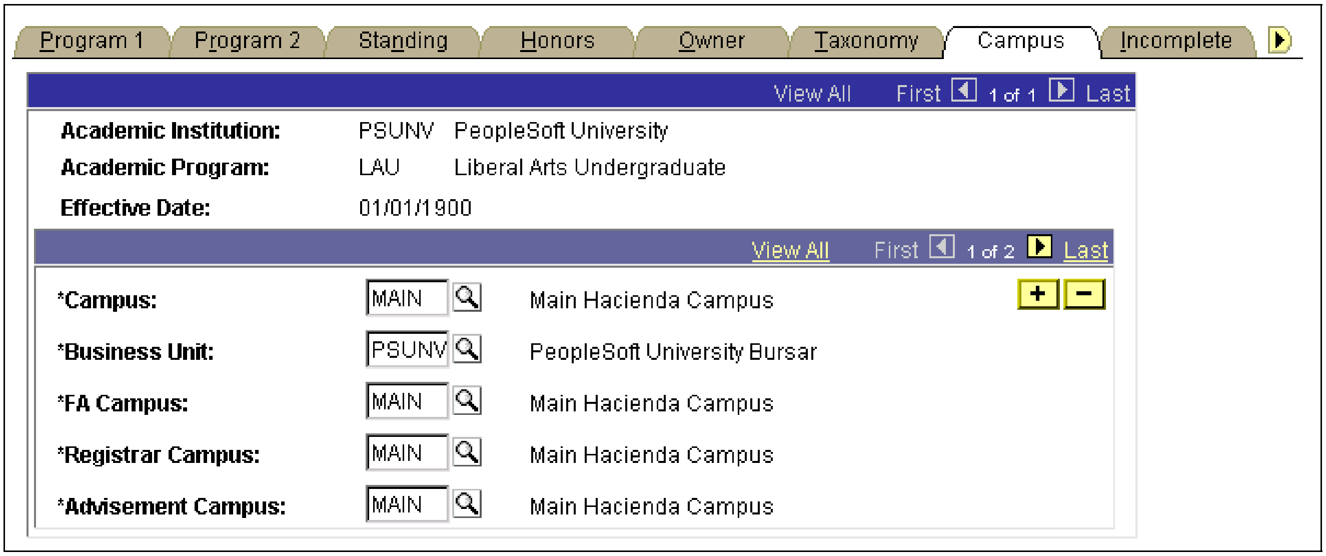
Access the Taxonomy page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Repeat Checking,” Setting Up Repeat Checking for Academic Programs

Defining Campuses and Business Units for Academic Programs

Access the Campus page.



Campus page

Campus — Select a primary campus for this academic program.

Business Unit — Select the business unit (for bursar purposes) for this academic program. Define business unit values on the SF Business Unit Table page.

FA Campus (financial aid campus) — Select the campus responsible for administering this academic program's financial aid. The system prompts you with values from the Campus Table page.

Registrar Campus — Select the campus responsible for student records within this academic program. The system prompts you with values from the Campus Table page.

Advisement Campus — Select the campus responsible for student advising within this academic program. The system prompts you with values from the Campus Table page.

Note. You can add multiple campuses to any field on this page by inserting a new row.

Defining Grade Lapse Rules for Academic Programs

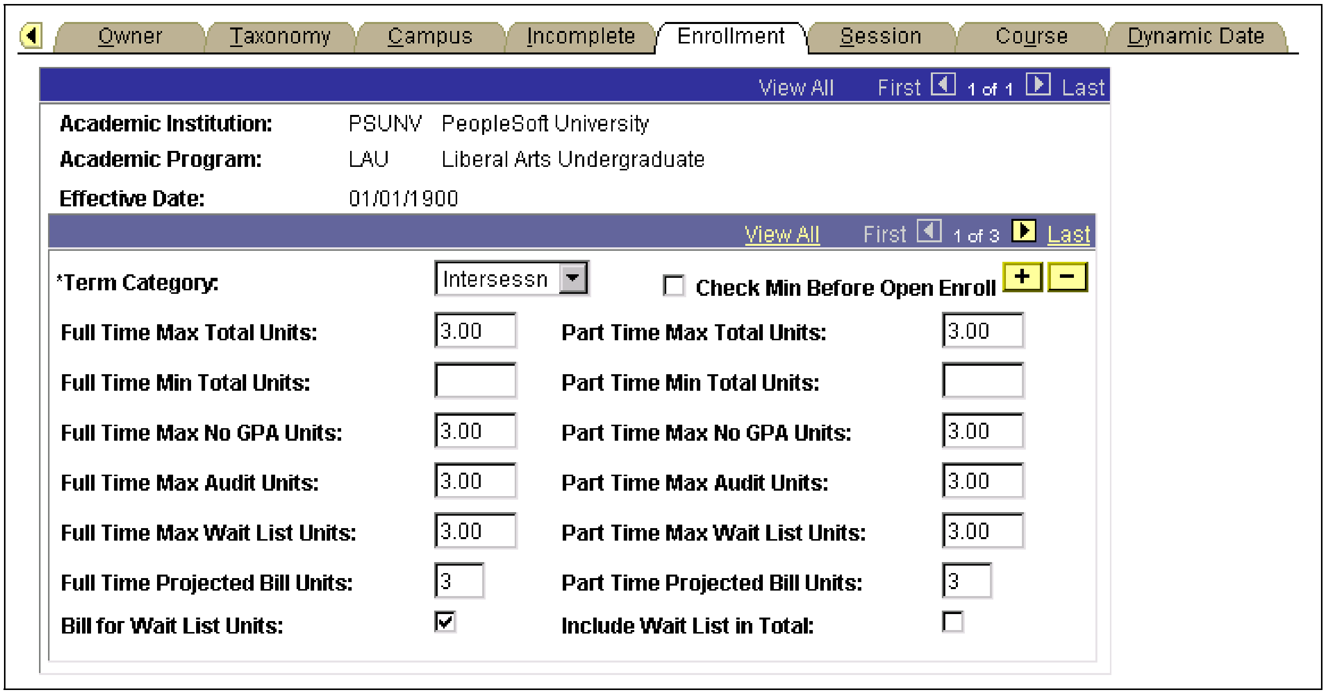
Access the Incomplete page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Grading Students," Running the Grade Lapse Process

Setting Up Term Enrollment Limits for Academic Programs

Access the Enrollment page.



Enrollment page

The full-time limits and part-time enrollment limits that you set on this page apply to students approved for a full-time or part-time academic load in the specified academic program and term category.

Term Category

Select the term category for this academic program's default term-enrollment limits. You can modify these translate values.

Note. You link term category values to actual terms and academic careers on the Term Table page.

Check Min Before Open Enrollment (check minimum before open enrollment)

Select to enable the enrollment engine to verify enrollment requests against the minimum unit amounts set *before* the open enrollment date. Set the open enrollment date on the Session Table page.

Full Time Max Total Units (full-time maximum total units) and **Part Time Max Total Units** (part-time maximum total units)

Enter the maximum number of units that a full-time and part-time student can be enrolled in for the specified term category within this academic program.

If you select the Include Wait List in Total check box on this page, the enrollment engine calculates the student's total units by adding the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) or *W* (waiting). If you clear the check box, the enrollment engine includes only the units taken for rows where the student enrollment status equals *E*.

Full Time Min Total Units (full-time minimum total units) and **Part Time Min Total Units** (part-time minimum total units)

Enter the minimum number of units that a full-time and part-time student can be enrolled in for the specified term category within this academic program. The enrollment engine references this value only when a student attempts to drop a class or make a unit adjustment for a class. To calculate the student's total units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment).

Full Time Max No GPA Units (full-time maximum non-grade point average units) and **Part Time Max No GPA Units** (part-time maximum non-grade point average units)	Enter the maximum number of units that a full-time and part-time student can enroll in with a non-GPA grading basis for the specified term category within this academic program. This number includes the maximum audit units. To calculate the student's total non-GPA units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the include in GPA (INCLUDE_IN_GPA) flag equals *N* (no).
Full Time Max Audit Units (full-time maximum audit units) and **Part Time Max Audit Units** (part-time maximum audit units)	Enter the maximum number of non-GPA units that a full-time and part-time student can take with an audit grading basis for the specified term category within this academic program. This number is part of the maximum non-GPA units. To calculate the student's total audit units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *E* (enrollment) and the audit grade basis (AUDIT_GRADE_BASIS) flag equals *Y* (yes).
Full Time Max Wait List Units (full-time maximum wait list units) and **Part Time Max Wait List Units** (part-time maximum wait list units)	Enter the maximum number of wait list units that a full-time and part-time student can have in the specified term category within this academic program. Wait list units are any combination of graded, non-GPA, and audit units. To calculate the student's total wait list units, the enrollment engine adds the units taken (UNT_TAKEN) for rows on the STDNT_ENRL table where the student enrollment status (STDNT_ENRL_STATUS) equals *W* (waiting).
Full Time Projected Bill Units and **Part Time Projected Bill Units**	Enter the number of units that the system uses to calculate projected tuition for billing prior to the completion of enrollment for full-time and part-time students in the term category within this academic program.
Bill for Wait List Units	Select to include wait list units in tuition calculations.
Include Wait List in Total	Select to enable the enrollment engine to include wait list units when calculating a student's full-time and part-time maximum total units. Clear this check box to enable a student to wait list up to the maximum wait list units regardless of maximum total units. **Note.** This check box affects only full-time and part-time maximum total units for the term. It *does not* affect session or appointment enrollment limits.

Examples of Term Enrollment Limits

The Liberal Arts Undergraduate (LAU) program at PeopleSoft University (PSUNV) limits full-time student enrollment into regular terms as follows:

Field	Value
Full Time Max Total Units	*18*
Full Time Max No GPA Units	*6*
Full Time Max Audit Units	*3*
Full Time Max Wait List Units	*6*
Include Wait List in Total	*Y*

A full-time student can enroll in a maximum of 18 units for the term. Of these 18 units, 6 can be non-GPA units. Of the 6 non-GPA units, 3 can be audit units. Let's say that a student wait lists the maximum 6 units and has yet to enroll in any units. Because the Include Wait List in Total check box is selected, the student can enroll in 12 additional units before reaching the maximum total units. Of these 12 units, 6 can be non-GPA units. Of the 6 non-GPA units, 3 can be audit units.

The Fine Arts Undergraduate (FAU) program at PSUNV limits part-time enrollment into regular terms as follows:

Field	Value
Part Time Max Total Units	*11*
Part Time Max No GPA Units	*3*
Part Time Max Audit Units	*3*
Part Time Max Wait List Units	*6*
Include Wait List in Total	*N*

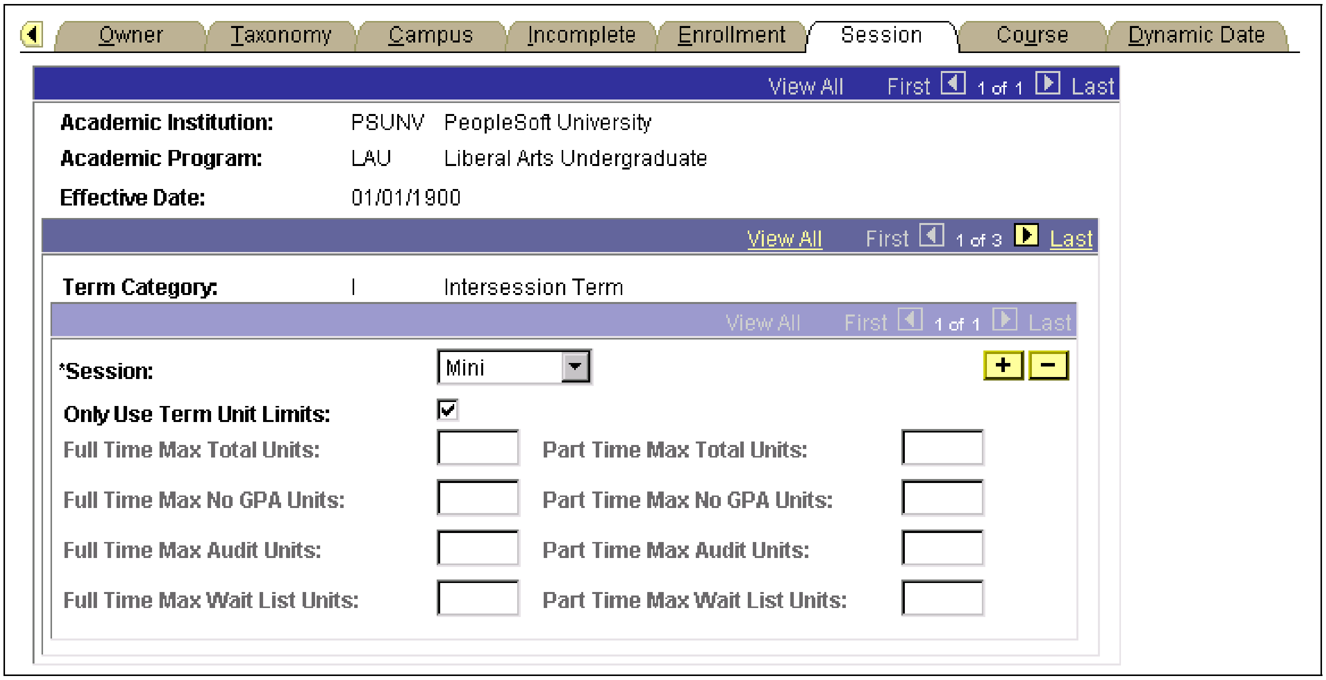
A part-time student can enroll in a maximum of 11 units for the term. Of these 11 units, 3 can be non-GPA units. Of the 3 non-GPA units, 3 can be audit units. Let's say that a student enrolls in 8 units. Because the Include Wait List in Total check box is cleared, the student can enroll in an additional 3 units maximum. Of these 3 units, 3 can be non-GPA units. Of the 3 non-GPA units, 3 can be audit units. The student can also wait list 6 additional units.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Managing Enrollment Appointments"

Setting Up Session Enrollment Limits for Academic Programs

Access the Session page.



Session page

The full-time limits and part-time enrollment limits apply to students approved for a full-time or part-time academic load in the specified academic program, term category, and session.

Session Select the session code within the specified term category for which you want to define enrollment limits.

Only Use Term Unit Limits Select if there are no enrollment limits specifically for the session type that you selected. The enrollment engine uses only term enrollment limits.

Full Time Max Total Units (full-time maximum total units) and **Part Time Max Total Units** (part-time maximum total units) Enter the maximum number of units that a full-time and part-time student can be enrolled in for the specified session and term category within this academic program.

Full Time Max No GPA Units (full-time maximum non-grade point average units) and **Part Time Max No GPA Units** (part-time maximum non-grade point average units) Enter the maximum number of units that a full-time and part-time student can enroll in with a non-GPA grading basis for the specified session and term category within this academic program.

Full Time Max Audit Units (full-time maximum audit units) and **Part Time Max Audit Units** (part-time maximum audit units) Enter the maximum number of units that a full-time and part-time student can take with an audit grading basis for the specified session and term category within this academic program.

Full Time Max Wait List Units (full-time maximum wait list units) and **Part Time Max Wait List Units** (part-time maximum wait list units)

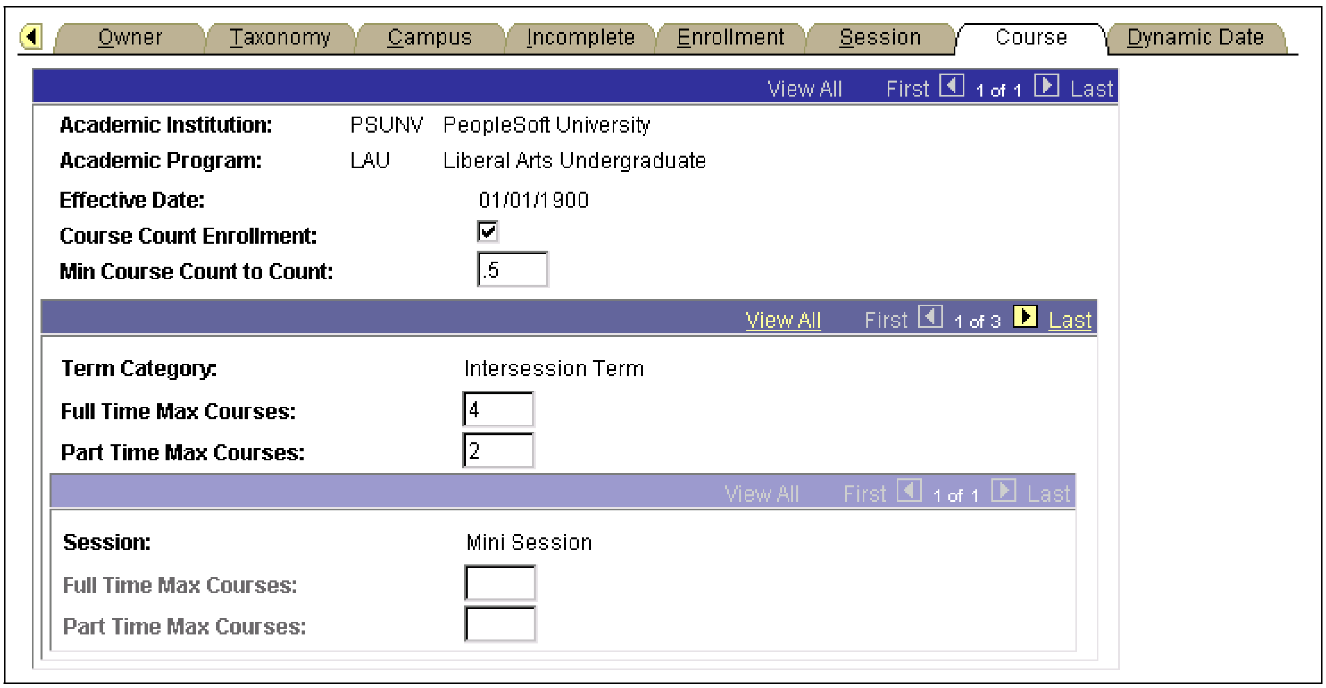
Enter the maximum number of wait list units that a full-time and part-time student can have for the specified session and term category within this academic program.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Managing Enrollment Appointments”

Setting Up Course Count Limits for Academic Programs

Access the Course page.



Course page

The enrollment engine uses these enrollment limits in addition to the unit limits when determining whether a student can enroll in a course. Define course count enrollment limits for specific course offerings on the Catalog Data page of the Course Catalog component.

Course Count Enrollment

Select to activate course count processing for class enrollment in this academic program. If you selected the Only Use Term Unit Limits check box on the Session page, the session type fields remain unavailable. Otherwise, all fields on this page become available.

Min Course Count to Count (minimum course count to count)

If applicable, enter the minimum course count value that a course must be worth to count towards the total full-time and part-time maximum course counts. For example, if you indicate that a course must meet a minimum course count value of 0.50, then a course’s count value must be greater than or equal to 0.50 to count towards the full-time maximum course and part-time maximum course limits.

Full Time Max Courses (full-time maximum courses (upper))
Enter the full-time maximum course counts for students enrolling in classes within the specified term category of this academic program.

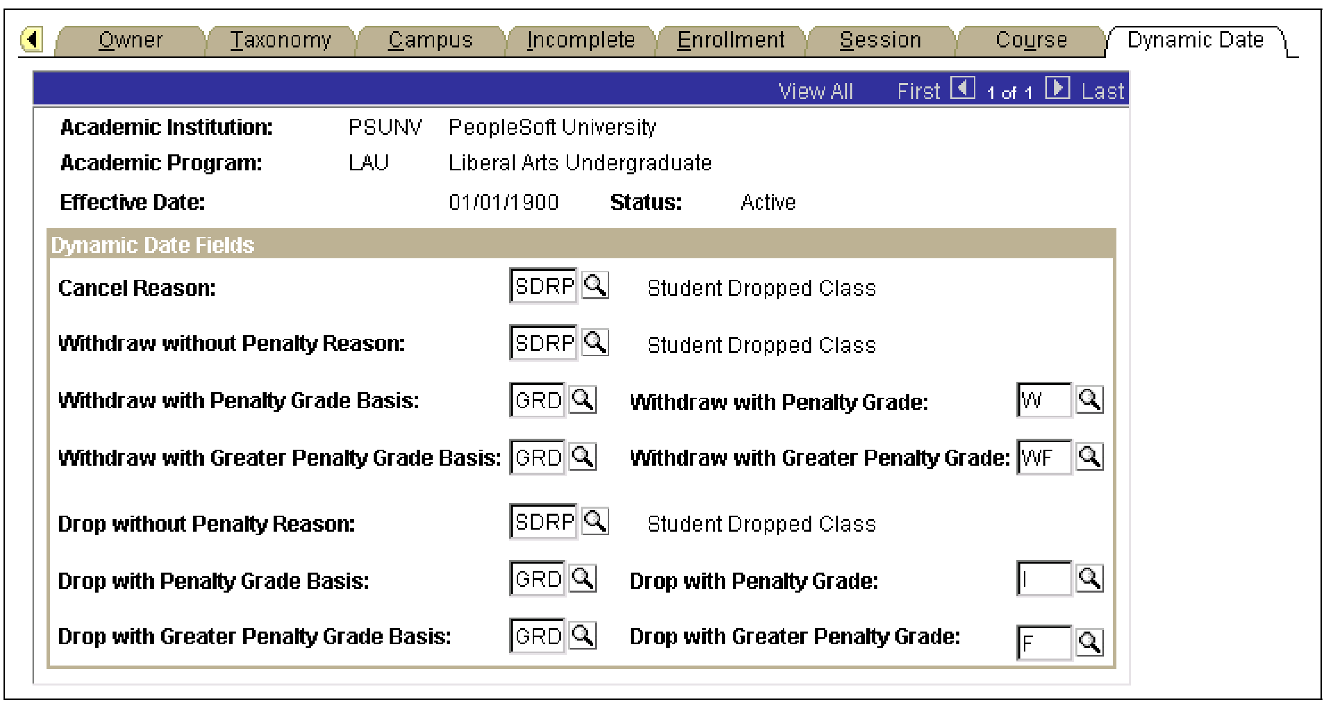
Part Time Max Courses (part-time maximum courses (upper))
Enter the part-time maximum course counts for students enrolling in classes within the specified term category of this academic program. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

Full Time Max Courses (full-time maximum courses (lower))
If you set specific session unit limits for this term category on the Session page, the Full Time Max Courses field and Part Time Max Courses field become available. Enter the full-time maximum course counts for students enrolling in classes within the session type of the specified term category.

Part Time Max Courses (part-time maximum courses (lower))
Enter the part-time maximum course counts for students enrolling in classes within the session type of the specified term category. These maximum course limits include only those courses that have a course count greater than or equal to the minimum course count value specified for the term category.

Setting Up Dynamic Date Fields for Academic Programs

Access the Dynamic Date page.



Dynamic Date page

Note. For students within a specified academic program to be able to drop or withdraw from open entry and exit classes, you must define the values on this page.

This page is available only if you enable the use of the Dynamic Class Dates features on the Academic Career Table 2 page. When you apply a dynamic class date rule to a class or OEE enrollment, the system uses the student's primary academic program to control the reasons and penalties for when the student cancels, withdraws from, or drops a class. These reasons and penalties relate to the corresponding landmark date deadlines on your dynamically calculated academic calendars. They apply to students according to their academic program and according to the dynamic class date rule of a class. You set up the dynamic class date rules on the Dynamic Class Dates page. You view and override the calculated deadlines for the regular dynamic class date rules on the Dynamic Data page and for OEE dynamic date rules on the Student OEE Enroll (student open entry and exit enroll) page.

When processing drops or withdrawals for dynamically dated classes during the penalty periods, the enrollment engine uses the penalty grades specific to the student's grading basis, as defined on the Grading Scheme Table page. If you have not defined penalty grades for the student's grading basis, the enrollment engine instead uses the grading bases and grades that you define for the student's primary academic program on this page.

Cancel Reason	Select the enrollment action reason that applies to a student's enrollment record when the student cancels a dynamically dated class on or before the cancel-date deadline. You can modify these translate values.
Withdraw without Penalty Reason	Select the enrollment action reason that applies to a student's enrollment record when the student withdraws or drops from a dynamically dated class after the cancel deadline but on or before the withdraw-without-penalty deadline. You can modify these translate values.
Withdraw with Penalty Grade Basis	Select the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline. Set up grading basis values on the Grading Scheme Table page. The grading basis that you select determines the grades available in the Withdraw With Penalty Grade field.
Withdraw with Penalty Grade	Select the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-without-penalty deadline but on or before the withdraw-with-penalty deadline.
Withdraw with Greater Penalty Grade Basis	Select the grading basis that determines a student's grade when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Withdraw With Greater Penalty Grade field.
Withdraw with Greater Penalty Grade	Select the grade that applies to a student's enrollment record when the student withdraws from a dynamically dated class after the withdraw-with-penalty deadline but on or before the withdraw-with-greater-penalty deadline.
Drop without Penalty Reason	Select the enrollment action reason that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-and-delete deadline but on or before the drop-and-retain-record deadline. You can modify these translate values.
Drop with Penalty Grade Basis	Select the grading basis that determines a student's grade when the student drops from a dynamically dated class after the drop-and-retain-record deadline

	but on or before the drop-with-penalty deadline. The grading basis that you select determines the grades available in the Drop With Penalty Grade field.
Drop with Penalty Grade	Select the grade that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-and-retain-record deadline but on or before the drop-with-penalty deadline.
Drop with Greater Penalty Grade Basis	Select the grading basis that determines a student's grade when the student drops from a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline. The grading basis that you select determines the grades available in the Drop With Severe Penalty Grade field.
Drop with Severe Penalty Grade	Select the grade that applies to a student's enrollment record when the student drops from a dynamically dated class after the drop-with-penalty deadline but on or before the drop-with-greater-penalty deadline.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Grading," Defining Grading Schemes

Defining Academic Plans

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

- Describe academic plans.
- Set up print options.
- Set up taxonomy.
- Establish academic organization ownership.

Understanding Academic Plans

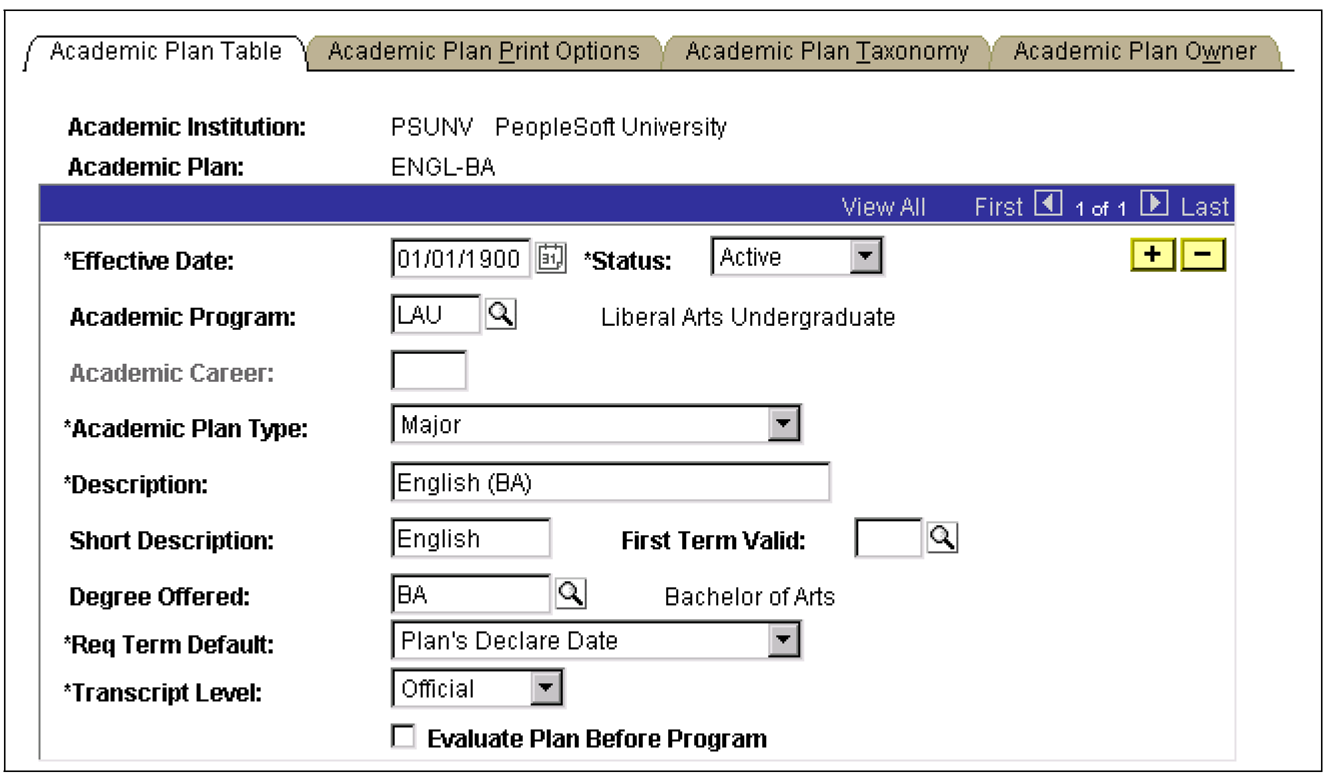
An academic plan is an area of study—such as a major, minor, or specialization—that is within an academic program *or* within an academic career. A student can earn only one degree for a single academic plan. If your institution offers dual degrees, you must establish separate academic plans for each degree, or you must create a combined degree, such as B.A./B.S. You can set up academic plans to award degrees, indicating completion of the academic program, or to award intermediate certificates or degrees.

Pages Used to Define Academic Plans

Page Name	Object Name	Navigation	Usage
Academic Plan Table	ACADEMIC_PLAN_TBL	Design Student Administration, Design Academic Structure, Setup, Academic Plan Table, Academic Plan Table	Describe academic plans, tie academic plans to an academic program or academic career, and specify the degree offered and other details.
Academic Plan Print Options	ACAD_PLAN_PRNT_OPT	Design Student Administration, Design Academic Structure, Setup, Academic Plan Table, Academic Plan Print Options	Set up diploma and transcript printing options and text for academic plans.
Academic Plan Taxonomy	ACAD_PLAN_TAXONOMY	Design Student Administration, Design Academic Structure, Setup, Academic Plan Table, Academic Plan Taxonomy	Set up academic plan taxonomy, including CIP codes, HEGIS codes, and fields of study for academic plans.
Academic Plan Owner	ACAD_PLAN_OWNER	Design Student Administration, Design Academic Structure, Setup, Academic Plan Table, Academic Plan Owner	Establish academic organization owners of the academic plan for reporting, analysis, and work distribution purposes.

Describing Academic Plans

Access the Academic Plan Table page.



Academic Plan Table page

Warning! If you want to change the academic program or academic career to which an academic plan belongs, you must first deactivate the academic plan, by inserting a new row and selecting a status of *inactive.* Then you must add another new row to tie the academic plan to a different academic program or academic career. This ensures proper functionality of academic plan prompts throughout the system.

Academic Program Select the academic program *or* an academic career to which this academic plan belongs. To require that a student be admitted to a specific academic program before being able to declare this academic plan, select an academic program to link to this academic plan.

Academic Career Select an academic career to link to this academic plan, if you want a student in any academic career to be able to declare this academic plan. For example, perhaps your institution wants all undergraduates to be able to declare computer science as their major (academic plan), regardless of whether the student is in a liberal arts program or an engineering program.

Academic Plan Type Select a type for this academic plan, such as *Major, Minor,* or *Concentration.* You can modify these translate values.

First Term Valid Select the first term in which students can be admitted to the academic plan. You cannot admit students to the academic plan prior to the term that you specify. If you select term *0000,* you can admit students to the plan for any term. When you convert data to your PeopleSoft system, be sure that you select, for each academic plan, a first valid term that is appropriate for the preexisting data of the academic plan. This field is optional.

Degree Offered Select the degree offered for completion of this academic plan. If your institution offers dual degrees, you must establish separate academic plans for each degree or create a combined degree, such as B.A./B.S. The system creates degree records according to the definition of your academic plan. Therefore, if a student graduates with dual degrees and the degrees are the same–such as an English-BA and Psychology-BA–the system creates one degree record. However, if a student graduates with dual degrees and the degrees are different–such as an English-BA and Biology-BS–the system creates two degree records, one for each degree.

Req Term Default (requirement term default) Select the default term for which you want the system to begin accumulating requirements for this academic plan. You can override the default value for individual students on the Student Plan page. Modification to these translate values requires a significant programming effort.

Note. Set a default here, so that when you analyze completion requirements for an academic plan, you know which set of requirements to use. Requirements can change over time.

Evaluate Plan Before Program Select to alter reporting sequences. This check box is a feature of PeopleSoft Academic Advisement.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Requirement Groups," Altering Academic Structure Processing

Setting Up Print Options

Access the Academic Plan Print Options page.

Diploma	Select to print a description on the diplomas for students who complete this academic plan. The Diploma Description field becomes available.
Transcript	Select to print a description on the transcripts for students with this academic plan. The Transcript Description field becomes available.
Diploma Description	Enter the description of this academic plan. This description appears on the diplomas for students who complete this academic plan. PeopleSoft currently does not provide a process to print diplomas.
Transcript Description	Enter the description of this academic plan. This description appears on the transcripts for students with this academic plan. You can override this text when you prepare students' transcripts.
Indent	Specify the number of spaces that you want to indent the related description on the printed document.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Grading," Defining Grading Schemes

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Transcripts"

PeopleSoft 8 SP1 Student Records PeopleBook, "Producing Transcripts"

Setting Up Taxonomy

Access the Academic Plan Taxonomy page.

CIP Code (Classification of Institutional Programs code)	Select the CIP code for this academic plan. CIP code values are delivered with your system as translate values. You can modify CIP codes on the CIP Code Table page.
HEGIS Code (Higher Education General Information Survey code)	Select the HEGIS code for this academic plan. HEGIS codes are delivered with your system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.
Field of Study	Select a field of study for this academic plan.
Plan Prospectus	Enter descriptions of the academic plan, such as information about special programs, faculty, and associated societies. You can then create a separate advisement report querying this field and print the report for brochures and other such documentation.

Establishing Academic Organization Ownership

Access the Academic Plan Owner page.

Academic Organization (upper) Select the academic organization that offers courses in this academic plan. Any academic organization entered here should also have a detail node associated with it for this academic plan on the academic organization tree. Define academic organizations on the academic organization tree.

Split Ownership Select to designate multiple academic organization owners for this academic plan. If you select this option, the lower Academic Organization field and the Percent Owned field become available.

Academic Organization (lower) Select the academic organization that owns this academic plan. Define academic organization values on the academic organization tree in PeopleTools Tree Manager. Modify them in the Academic Organization Table component.

Percent Owned Enter the percentage of the academic plan for which the academic organization is responsible. You can have academic organizations with split ownership of the academic plan, but the total percent owned between academic organizations must equal *100.*

See Also

Chapter 12, "Securing Your Academic Institution," Securing Academic Organizations, page 192

PeopleTools:Tree Manger

Defining Academic Subplans

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

- Describe academic subplans.
- Set up taxonomy.

Understanding Academic Subplans

Academic subplans are areas of further specialization within academic plans and are tied to academic plans. You can define an academic subplan as a minor, concentration, or specialization. For example, a major of English might have additional work associated with it that leads the student to concentrate in creative writing, or a Ph.D. program in mathematics can have specializations in computer science and physics.

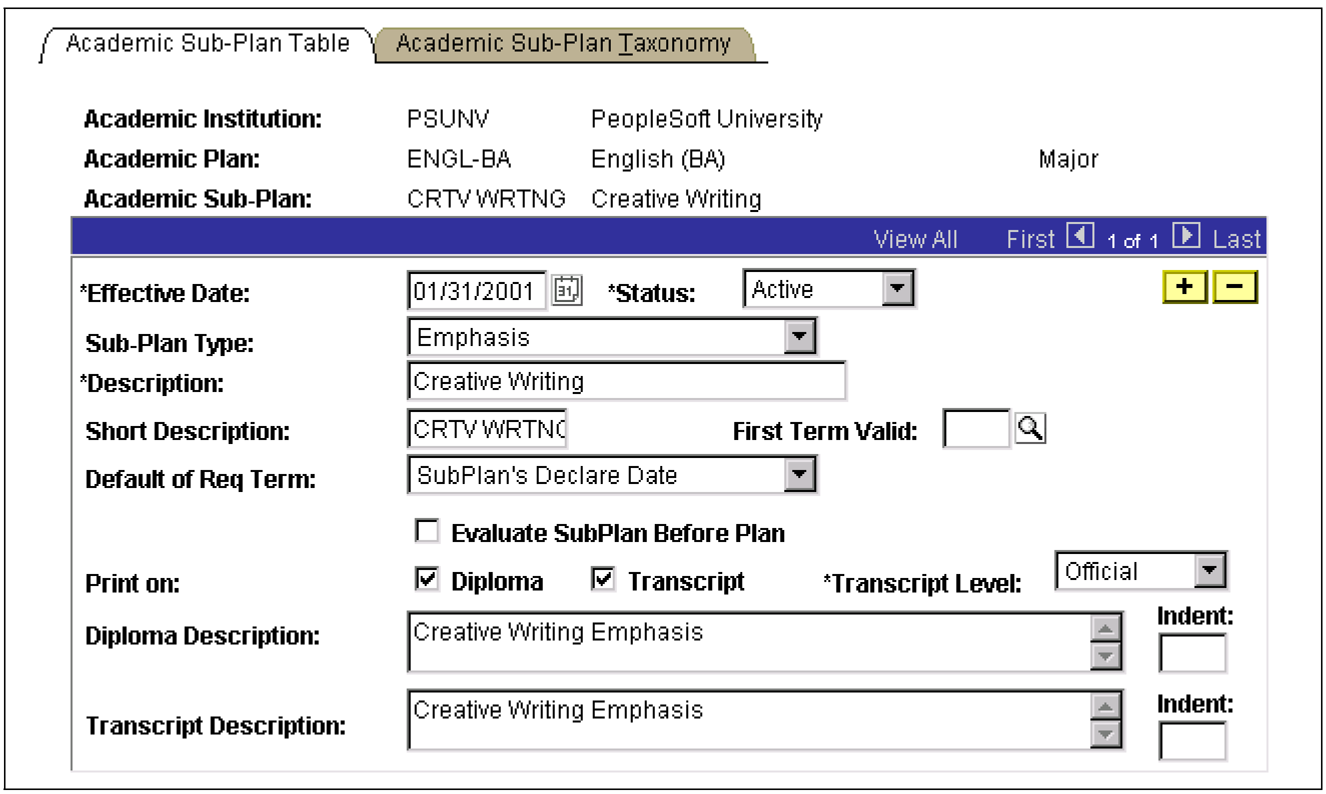
Determining whether to create academic subplans as minors is dictated by the academic plan and your academic structure. For instance, if students can minor in creative writing only if they major in English, then you would define the creative writing minor as a subplan and link it to the English academic plan. If students can minor in creative writing regardless of their major, then you would define creative writing as a minor on the Academic Plan Table page.

Pages Used to Define Academic Subplans

Page Name	Object Name	Navigation	Usage
Academic Sub-Plan Table	ACAD_SUBPLAN_TBL	Design Student Administration, Design Academic Structure, Setup, Academic SubPlan Table, Academic Sub-Plan Table	Describe academic subplans, and establish diploma and transcript printing options and text for academic subplans.
Academic Sub-Plan Taxonomy	ACAD_SUBPLAN_TXNMY	Design Student Administration, Design Academic Structure, Setup, Academic SubPlan Table, Academic Sub-Plan Taxonomy	Set up taxomony for academic subplans, including CIP codes and HEGIS codes for academic plans.

Describing Academic Subplans

Access the Academic Sub-Plan Table page.



Academic Sub-Plan Table page

Sub-Plan Type

Select a type for this academic subplan. You can modify these translate values.

First Term Valid

Select the first term in which students can be admitted to the academic subplan. You cannot admit students to the academic subplan prior to the term that you specify. If you select term *0000,* you can admit students to the subplan for any term. When you convert data to your PeopleSoft system, be sure that you select, for each academic subplan, a first valid term that is appropriate for the preexisting data of the academic subplan. This field is optional.

Default of Req Term (default of requirement term)
: Select the default term for which you want the system to begin accumulating requirements for this academic subplan. You can override the default value for individual students on the Student Sub-Plan page. Modification of these translate values requires a significant programming effort.

Note. Set a default here, so that when you analyze completion requirements for an academic subplan, you know which set of requirements to use, as requirements can change over time.

Evaluate SubPlan Before Plan
: Select to alter reporting sequences. This check box is a feature of PeopleSoft Academic Advisement.

Diploma
: Select to print a description on student diplomas. The Diploma Description field becomes available.

Transcript
: Select to print a description on student transcripts. The Transcript Description field becomes available.

Diploma Description
: Enter the description of this academic subplan. This description appears on student diplomas. PeopleSoft currently does not provide a process to print diplomas.

Transcript Description
: Enter the description of this academic subplan. This description appears on student transcripts. You can override this text when you prepare students' transcripts.

Indent
: Specify the number of spaces that you want to indent the related description when printing the document.

See Also

PeopleSoft 8 SP1 Academic Advisement PeopleBook, "Setting Up Academic Requirement Groups," Altering Academic Structure Processing

PeopleSoft 8 SP1 Student Records PeopleBook, "Producing Transcripts"

Setting Up Taxonomy

Access the Academic Sub-Plan Taxonomy page.

CIP Code (Classification on International Programs code)
: Select the CIP code for this academic subplan. CIP code values are delivered with your system as translate values. You can modify CIP codes on the CIP Code Table page.

HEGIS Code (Higher Education General Information Survey code)
: Select the HEGIS code for this academic subplan. HEGIS codes are delivered with your system as translate values. You can modify HEGIS codes on the HEGIS Code Table page.

CHAPTER 11

Introducing Security for Your System

This chapter provides an overview of application security and discusses:

- Security Vocabulary
- Row-Level Security Options

Understanding Application Security

PeopleSoft applications use the capabilities and flexibility of multilevel security to provide an efficient, effective security solution. When you manage an environment with shared data, you need a security system that protects data at various access levels. You also need the flexibility to define the most effective and efficient path to that data across business groups, tables, departments, pages, and so forth. PeopleSoft uses an approach that enables you to set up data access at different entry points within your system.

Security access falls into three categories:

- Network security.
- Database security.
- PeopleSoft application security.

Network security controls the overall point of entry into system hardware and software. Database security narrows the scope of user access to information. Application security enables you to control access down to the level of an individual field.

Most system users typically have access to a defined set of functions, pages, or fields that enable them to perform their jobs. Examples of such users are the following:

- Auditors who must review inquiry pages and generate reports.
- Users who run PeopleSoft business processes.
- Management Information Systems (MIS) staff members who configure and maintain pages and records.

In PeopleSoft applications, you have full control over security definitions and how they fit together. The security options that you select create a matrix that enables or blocks user access to data through a series of authorizations. Users pass through several levels of authorizations before the system grants them access to any subset of your data.

Important! Creating security for prompt values or rows of data is *not* the same as giving security access to pages, which you do in PeopleTools. Giving users access to pages using PeopleTools is required in addition to the security setup discussed in this chapter.

Learning the Vocabulary of Security

Before you can enable security, you must understand the security terms and functions for each level of your system.

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
RDBMS (Relational Database Management System)	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups used in application development.
Query	PeopleTools	Defines which set of table rows a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Controls access to the subset of data rows within tables to which the user has authority.
Field-level	PeopleCode	Controls access to individual fields within pages.

Specifying Row-Level Security Options

To establish security within your PeopleSoft application, decide what level of security to establish throughout your system, which key fields to secure, and whether security will be handled through user IDs or roles. Security can restrict individual users or roles from specific rows of data that are controlled by such key fields as SetID and Business Unit. You can also limit user access to only a specific subset of rows. For example, user ID security can allow the law school to access only the item types assigned for the law school. Or, if you have a group of staff in the registrar's office, you can add them all to a role and use role security to enforce the appropriate limits on their system access. A user may be assigned to one or more roles, providing considerable flexibility to access necessary resources. As a result, a user who is linked to more than one role can use the menu items assigned to any of those roles. Some security attributes—such as row-level security—cannot be defined by combining roles. Only one role can be used for this purpose. In the PeopleTools, Maintain Security menu you designate row-level security for a user by selecting a role. The row-level security attributes for the role that you select then become the security attributes for that user.

Because various combinations of security are possible, it is important to understand the effects of row-level security when you use the following mix of system security options and roles:

System Security	Role of User ID	Row-Level Security
No security	User ID is not linked to a role.	Not applicable; each user can access any object because there is no security implemented.
User-level security	User ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. It is possible, however, to link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then that user will have access to menu items, but will not have access to any application pages with key fields enabled for row-level security.

You must set up which users or roles have access to specific business units, set IDs, and any other key fields that your application requires. For example, you might want to permit access to only one business unit for a certain role of users.

When a user in this role enters data, the system prompts for a business unit because this is the primary key for data related to the business unit. The available selections on the prompt list for this user include only the business units for which the user has been granted authority. What appears in the prompt list is data that has been filtered through one or more levels of security.

The following sections discuss how to:

- Maintain Row-Level Security.
- Set Up Row-Level Security Views.

- Define Row-Level Security for Users.

See Also

PeopleTools: Security

Maintaining Row-Level Security

The sheer number of users assigned the same level of security should be a key factor in determining whether your type of security should be based on user ID or role maintenance. If there are thousands of users who have identical access requirements, it is good idea to explore roles. By assigning these users to a single role, subsequent changes in access requirements for these users can be made once rather than multiple times.

Setting Up Row-Level Security Views

Business units and tableset IDs are maintained in edit tables and can be used as primary keys throughout your system. When a field uses an edit table to select values, you are limited to selecting only the values that have already been defined for that edit table. PeopleSoft row-level, application security, when activated, enables you to specify values from the edit table, so that only those values are available in a particular view. Think of views as a means to access data horizontally across more than one table. Views are SQL statements that filter out data rows whose key values are not needed as valid access parameters. The result is that users who are authorized to access set IDs or business units see only a subset of the values from these edit tables. Once these views are set up, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from a particular role.

See Also

PeopleTools: PeopleCode Reference, "PeopleCode Built-in Functions"

Defining Row-Level Security for Users

After you select your security options and set up security view names, you are ready to define the actual secured field values used by each user or role. When you secure key fields in your application, the page that you use depends on which level of system security you select. If you select user-level security, you utilize user security pages. If you select role-level security, you use the permission list security pages.

CHAPTER 12

Securing Your Academic Institution

This chapter discusses how to:

- Secure access to student data.
- Secure academic structure.
- Secure academic organizations.

Securing Access to Student Data

You can secure a user's access to pages that contain student information. This section provides an overview of security for access to student data, lists prerequisites, and discusses how to:

- Set component security.
- Run the security views update process and report.
- Specify search parameters for security view changes.
- Review security table audit information.
- Review security detail audit information.

Understanding Security for Access to Student Data

The Component Security feature provides the option to impose security on selected components, based on a student's institution, career, program or plan. The specific security level is set on the Security Views page. The security level determines which search record (security view) is used when the user attempts to enter the component. The option of *No Security* leaves the original search records that were delivered with the system in place. The security views delivered with this feature enable the system to check that the user has access to the appropriate institution, career, program, or plan in order to view, update, or add data relating to a student's record.

The security level only becomes effective when the Security Views Update process (SRSECVWU) is run. This process exchanges the original search record with one of the delivered security views for a component (Global Security option) or a specific menu item. In the latter case, the component search record is overridden only on the specific menu item with one of the security views, thus enabling you to impose different levels of security for components accessed using different menu navigation paths.

Once you have created security views for your institution, and you have applied various views for components that you want to secure, you can use the Security View Change Audit component to view the details of any changes to those settings. For example, you may view the user ID, date of action and action taken, and the security level settings for a particular component. You can see when the security view was created, updated, or deleted, and the state of the record before and after a change. A check box on the Search Criteria page controls how the system returns values that match your selection criteria.

Note. This feature should not be used to update search record security for self-service features.

Here's how to secure access to student data:

1. Identify and define levels of security for a component on the Security Views page.
2. Update security definitions by running the Security Views Update process on the Security Views page.
3. If necessary, perform an audit of changes to security on the Security View Change Audit component.

Prerequisites

Before you implement component security, identify persons at your organization with both technical and functional expertise to review this feature. While the Component Security feature is functional in application, it is quite technical in design and implementation. The individuals assigned to evaluate, incorporate, and support this feature must not only understand the way staff and faculty interact with student-centered components at your institution, they must also have a solid understanding of table structures, security views, and page caching. A working knowledge of managing version control and PeopleSoft lock records is also useful.

PeopleSoft suggests that you begin the review process by thoroughly investigating delivered security views for all tables. Run the Security Views report (Report Only option selected) to do this. Notice in the report that the majority of delivered component security views are not set at the global level, but at the menu item level. Also notice that most of the delivered views are limited to PeopleSoft Academic Advisement, PeopleSoft Recruiting and Admissions, PeopleSoft Campus Community, and PeopleSoft Student Records. Every delivered security view is set to a value of *None.* This means there is no security implemented (other than standard preexisting people search filters) until you change this setting for every component that you want to secure. Familiarize yourself with the levels of security available (there are five in all), and decide which levels work for the components at your institution.

Upon review of the delivered security views, evaluate and set the security-level settings you want for all components. Again, all delivered component views are provided with a security level of *None,* so you must update this value and assign data in the Security Views fields accordingly. You may change these settings at any time, but the Security View Update process must be run to activate such changes.

Finally, the PeopleSoft delivered feature includes security views setup data for many components, all of which use one of the following search records:

Search Record #	No Security View	Institution Security View	Career Security View	Program Security View	Plan Security View
1	PEOPLE_ SRCH	STDNT_INS_ SCRTY	STDNT_CAR_ SCRTY	STDNT_PRG_ SCRTY	STDNT_PLN_ SCRTY
2	STDNT_CAR_ SRCH	STUCAR_ INS_SEC	STUCAR_ CAR_SEC	STUCAR_ PRG_SEC	STUCAR_ PLN_SEC
3	STDNT_ TERM_SRCH	STUTRM_ INS_SEC	STUTRM_ CAR_SEC	STUTRM_ PRG_SEC	STUTRM_ PLN_SEC
4	ENRL_REQ_ SRCH	ENRLREQ_ INS_SEC	ENRLREQ_ CAR_SEC	ENRLREQ_ PRG_SEC	ENRLREQ_ PLN_SEC
5	STDNT_INC_ SRCH	STDINC_INS_ SEC	STDINC_ CAR_SEC	STDINC_ PRG_SEC	STDINC_PLN_ SEC
6	STDNT_ MLST_SRCH	STDMLST_ INS_SEC	STDMLST_ CAR_SEC	STDMLST_ PRG_SEC	STDMLST_ PLN_SEC

The majority of delivered security views reference PEOPLE_SRCH. If you want to create additional security for components not included in the set delivered by PeopleSoft, you can accomplish this in one of two ways:

- If the component already uses one of the seven search records listed, add the component using the Security Views page and enter all the corresponding views in the Security Views group box.

  Use the table as your template.

- If the component uses a search record other than the seven listed, you can create modified security views for institution, career, program, and plan security.

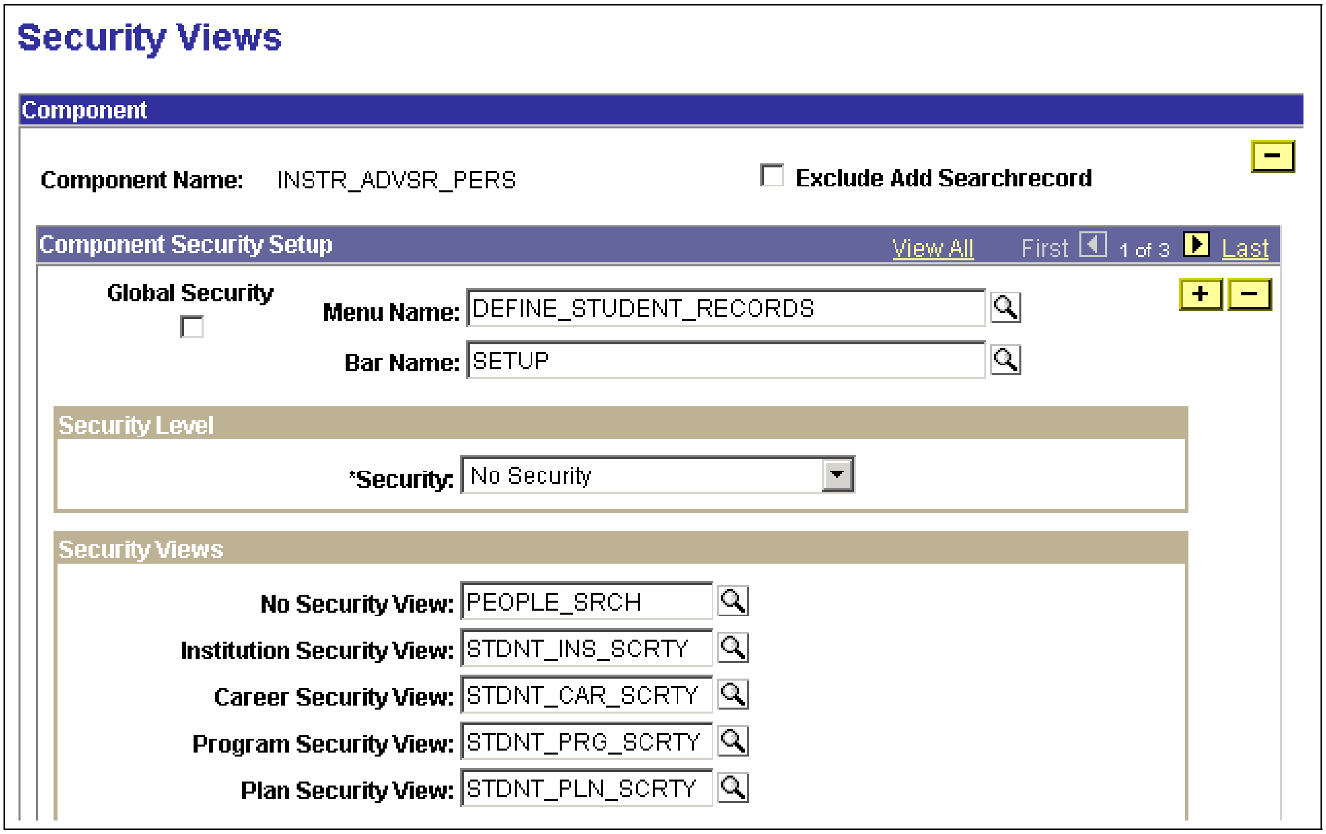
  Add the component using the Security Views page and enter all of its corresponding modified views in the Security Views group box.

Pages Used to Secure Access to Students

Page Name	Object Name	Navigation	Usage
Security Views	ES_SECURITY_TBL	Design Student Administration, Secure Student Administration, User ID, Security Views, Security	Set component security to identify student-related components to which you want to assign some level of security. In addition, specify the level of security (institution, career, program, plan) that you want the system to impose.
Security Views Update	RUNCTL_SRSECVWU	Design Student Administration, Secure Student Administration, Process, Security Views Update, Security View Update	Run the security views update process, once you are satisfied with your security views setup or after changes have been made. You can also use this page to create a security views summary report for all security views at your institution.
Search Criteria	SECURITY_AUDIT	Design Student Administration, Secure Student Administration, User ID, Security View Change Audit, Search Criteria	Specify your search parameters for component security view changes.
Security Table	AUD_SECURITY_TBL	Design Student Administration, Secure Student Administration, User ID, Security View Change Audit, Security Table	Review security table audit information about security view changes that match the selection criteria specified on the Search Criteria page. This page displays any changes made to the Add Searchrecord setting for the table.
Security Detail	AUD_SECURITY_DTL	Design Student Administration, Secure Student Administration, User ID, Security View Change Audit, Security Detail	Review security detail audit information about security view changes that match the selection criteria specified on the Search Criteria page. Security detail values correspond to the parent record on the Security Table page.

Setting Component Security

Access the Security Views page.



Security Views page

When a user attempts to open one of the components that you specify, the system checks the user's security for either Institution, Career, Program, or Plan, to verify that they can access the student data using the component. In some cases, the menu navigation is also verified.

Note. Simply adding components to the Security Views page does not automatically secure them. Once you have specified all necessary components and views on the Security Views page, run the Security View Update Report to implement the settings.

Component

Exclude Add Searchrecord

Select this check box if you want to run the security process without updating the Add Searchrecord. Note that, if the check box is cleared, you may inadvertently overwrite predefined Add Searchrecord views. Before running the Security View process with this check box cleared, review your Add Searchrecord settings by running a query, or by reviewing your Add Searchrecord settings in PeopleSoft Application Designer on the component Properties page.

All PeopleSoft delivered security view settings have this check box cleared, with the exception of ENRL_REQUEST components. Change this setting if you must before running the Security Views Update process (SPSECVWU).

Component Security Setup

Global Security

Select this check box if you want to secure the component name everywhere that the component is used, regardless of menu name or bar name.

Do NOT select this check box if want to have different security views set up for the component, dependent on navigation path. For example, if the component is reached using the Manage Student Records, Track Student Careers, Setup menu path, you may want to clear the Global Security check box and enter this data. Then, insert a second row that specifies unique security level and security view data for the component name if it is reached using the Manage Student Records, Establish Courses, Setup menu path.

The following SQL select statements may be used to research the global and specific occurrence of a particular component.

- To identify components that have multiple menu paths, use the following SQL select statement:

```
SELECT PNLGRPNAME, MENUNAME, BARNAME, ITEMLABEL FROM PSMENUITEM

WHERE PNLGRPNAME = 'COMM_SUMMARY_PERS'
```

- To identify if a search record exists at the menu level, you can use either the PeopleSoft Application Designer Menu Item Properties page, or the following SQL select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSMENUITEM

WHERE PNLGRPNAME = 'ACAD_PLAN'
```

  If a search record exists, the search record at the component level has no effect here. Hence, the page is secured at the menu level using this search record.

- To identify the search record at the component level, you can use either the PeopleSoft Application Designer Component Properties page, or the following SQL select statement:

```
SELECT PNLGRPNAME, SEARCHRECNAME FROM PSPNLGRPDEFN

WHERE PNLGRPNAME = 'ACAD_PLAN'
```

  If a search record does not exist at the menu level, the search record at the component level is used to access and secure the page.

Menu Name

If you do not select the Global Security check box, the Menu Name field is available for entry. Specify the particular menu name for which you want to apply this security view. Use this field to isolate a component name that is accessible using multiple menu navigation paths (for example, INSTR_ADVSR_PERS displayed in page shot), where you want component security to be different depending on the navigation used.

Bar Name

If you do not select the Global Security check, the Bar Name field is available for entry. Specify the bar name that coincides with the menu name entered, for which you want to apply this security view. Use this field to isolate a component name that is accessed by multiple menu bar navigation paths where you want component security to be different depending on the navigation used.

Security Level

Security

Use this field to specify the security you want to apply at this level for the component name. The level specified here requires that all user ID's used to attempt access to this component have appropriate security. For example, if you set the Security field to *Program Level Security,* the user ID attempting to open the specified component must have security set up on the Academic Program Security page for the same academic program of the student being accessed. In addition, if the user ID has access to careers and plans, but has no user ID security set up for access to programs (and in particular, the accessed student's program), then they are denied access.

Security leve options are:

No Security: No security is imposed on the component name specified. PeopleSoft suggests that you never delete a delivered component security view entry, even if you find that your organization does not need it. Instead of deleting the security view entry for a particular component, set the Security field to *No Security.*

Institution Level Security: Secures the component name at the institution level. This requires that user ID attempting to access student data using the component specified must have access to the institution that matches the student. This user ID access is set up on the Academic Institution Security page.

Career Level Security: Secure the component name to the career level. This requires that user ID's attempting to access student data using the component specified must have access to the Career that matches the student. This user ID access is set up on the Institution/Career Security page.

Program Level Security: Secure the component name at the Program level. This requires that user ID attempting to access student data using the component specified must have access to the Program that matches the student. This user ID access is set up on the Academic Program Security page.

Plan Level Security: Secure the component name at the Plan level. This requires that user ID attempting to access student data using the component specified must have access to the Plan that matches the student. This user ID access is set up on the Academic Plan Security page.

Note. Security values are delivered with your system as translate values. These translate values should not be modified in any way. Any modifications to these values will require a substantial programming effort.

Security Views

All of the security view settings delivered with your system are provided by PeopleSoft as an initial setting that you may add to, or alter, to fit your own business needs *prior* to running the Security Views Update process.

PeopleSoft populates each field for delivered component name security views with the appropriate security view (search record) based upon institution, career, program, plan or no security. Usage of a particular view is determined by the selected security value. You may choose any security value, based upon your needs, and the corresponding security view will be used. All of the security views fields prompt against all security records in the database, including those modified by you.

You are required to enter a security view value for the corresponding level specified in the Security field. For example, if you specify *Program Level Security* in the Security field, then you must enter a value in the Program Security View field.

No Security View	If *No Security* has been selected in the Security field, then you must enter a value in this field. The view you select is used to filter (not necessarily secure) which students are accessible through the component. For security views provided by PeopleSoft, this field is set to match each specific component. For example, the ACADEMIC_DEGREE component is delivered with a No Security View field setting of *PEOPLE_SRCH.* This is because the delivered searchrecord for ACADEMIC_DEGREE is set to *PEOPLE_SRCH.* You can change this value.
Institution Security View	If *Institution Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user ID's can access the component. For the majority of security views provided by PeopleSoft, this field is set to *STDNT_INS_SCRTY,* which references the user ID security set up on the Institution Security page. You can change this value.
Career Security View	If *Career Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user ID's can access the component. For the majority of security views provided by PeopleSoft, this field is set to *STDNT_CAR_SCRTY,* which references the user ID security set up on the Institution/Career Security page. You can change this value.
Program Security View	If *Program Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user ID's can access the component. For the majority of security views provided by PeopleSoft, this field is set to *STDNT_PRG_SCRTY,* which references the user ID security set up on the Academic Program Security page. You can change this value.
Plan Security View	If *Plan Level Security* has been specified in the Security field, then you must enter a value in this field. The system uses the security view entered in this field to determine which user ID's can access the component. For the majority of security views provided by PeopleSoft, this field is set to *STDNT_PLN_SCRTY,* which references the user ID security set up on the Academic Plan Security page. You can change this value.

Note. Components based on search records other than PEOPLE_SRCH are delivered with settings different from those mentioned here for Institution Security View, Career Security View, Program Security View, and Plan Security View.

Running the Security Views Update Process and Report

Access the Security Views Update page.

Important! The first time all users log on to the system after you run the Security Views Update process, all PeopleTools data pertaining to pages will recache. Because of this, you should run this process at the same time that you run some other major maintenance process, rather than immediately prior to a heavy traffic period for your institution. The recaching of pages slows initial page access for users, and should you erroneously delete or change security, it is better to catch your error during a system lull, than during a peak admission, billing, or registration period.

Report Only

Select to create the SA Security View Update report (SRSECVWU) without updating security view access for components at your institution.

If this check box is clear, the process updates security view access *and* creates the Security Views report.

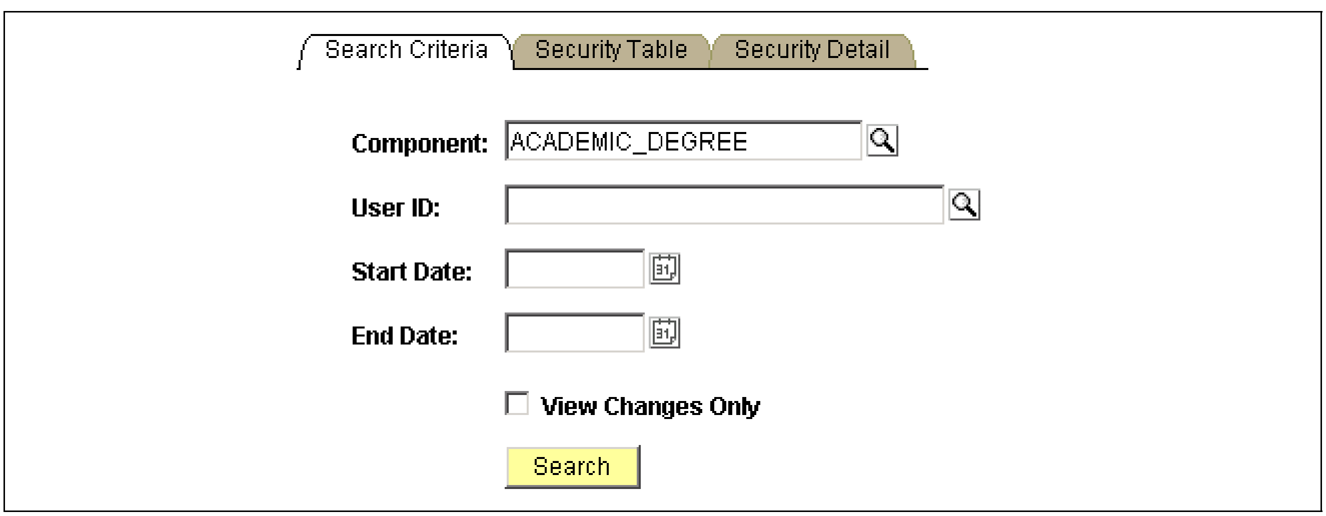
Run

Run the Security Views Update process (SRSECVWU) as needed. When you run this process, the system updates PS Lock Record.

Note. It is very important that you do NOT run the update process until you are satisfied with all of your security views data, including the security views data delivered by PeopleSoft. PeopleSoft suggests that you review all of the security view data settings thoroughly (looking particularly for unwanted settings of the Exclude Add Searchrecord and Global Security options) before you run this process.

Specifying Search Parameters for Security View Changes

Access the Search Criteria page.



Search Criteria page

Component The component object name to be audited for security. This field is required.

User ID The user ID that you want to audit. Leave this field blank to have the system retrieve all values for this field.

Start Date The earliest date to be audited. Leave this field blank to have the system retrieve all values for this field.

End Date The latest date to be audited. Leave this field blank to have the system retrieve all values for this field.

View Changes Only If this check box is cleared, the system returns all records with an action of *Insert, Before, After,* or *Delete.*

If this check box is selected, the system does not return records with an action of *Before.*

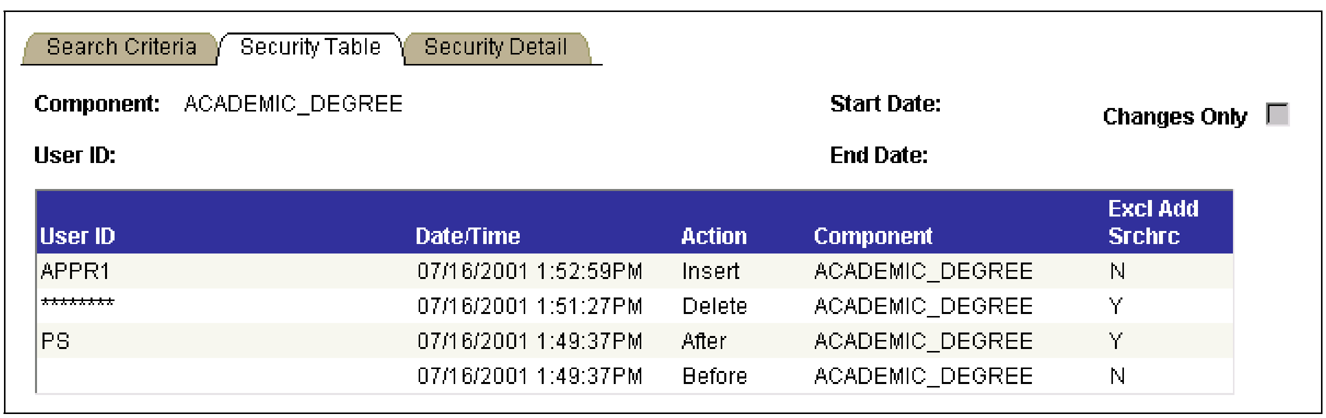
Think of this check box as a "before and after." If you only want to see the "after" value then select this check box. If it is important to see the "before" value, then clear this check box.

Search Once you have entered your selection criteria, click this button to return audit data to the Security Table and Security Detail pages. To change the data that the system returns, update the selection criteria and click this button again.

Note. When you click this button, the retrieval process begins and the system automatically takes you to the first page with data (either Security Table or Security Detail). If no changes have been made to the table itself, the system automatically transfers you to the Security Detail page.

Reviewing Security Table Audit Information

Access the Security Table page.



Search Criteria | Security Table | Security Detail

Component: ACADEMIC_DEGREE **Start Date:** **Changes Only**

User ID: **End Date:**

User ID	Date/Time	Action	Component	Excl Add Srchrc
APPR1	07/16/2001 1:52:59PM	Insert	ACADEMIC_DEGREE	N
********	07/16/2001 1:51:27PM	Delete	ACADEMIC_DEGREE	Y
PS	07/16/2001 1:49:37PM	After	ACADEMIC_DEGREE	Y
	07/16/2001 1:49:37PM	Before	ACADEMIC_DEGREE	N

Security Table page

User ID The user ID of the individual who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string ******** appears in the User ID field.

Date/Time — When the changes to the Security View table were made.

Action — Action types are the following:

Insert: User inserted a new row in the database.

Delete: User deleted a row from the database.

Before: Image of the record before it was updated.

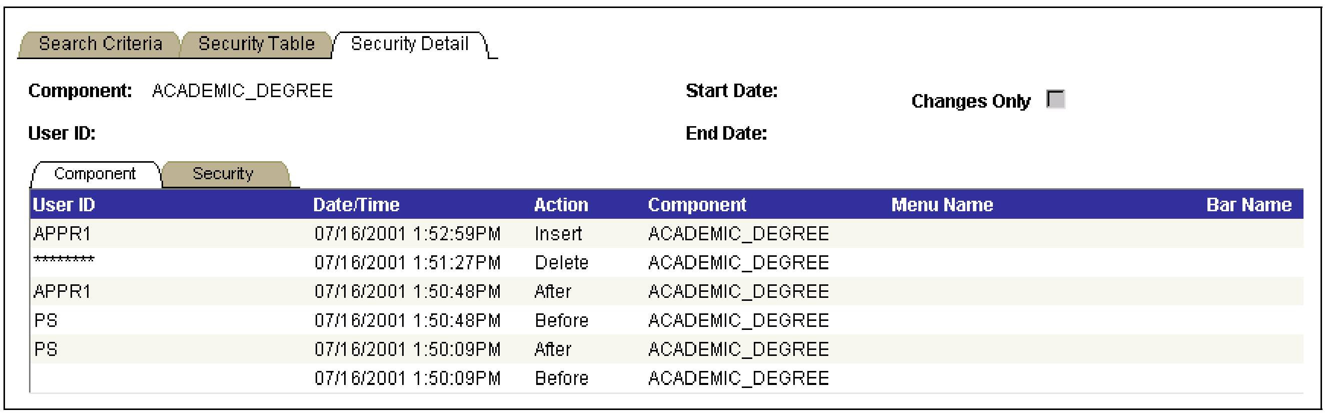
After: Image of the record after it was updated.

Component — The component that you selected as part of the search criteria is displayed.

Excl Add Srchrc (exclude add searchrecord) — Displays the status of the Exclude Add Searchrecord option on the Security Views page. *Y* for selected or *N* for cleared indicates the status of the check box.

Reviewing Security Detail Audit Information

Access the Security Detail page.



Search Criteria | Security Table | Security Detail

Component: ACADEMIC_DEGREE Start Date: Changes Only

User ID: End Date:

Component | Security

User ID	Date/Time	Action	Component	Menu Name	Bar Name
APPR1	07/16/2001 1:52:59PM	Insert	ACADEMIC_DEGREE		
********	07/16/2001 1:51:27PM	Delete	ACADEMIC_DEGREE		
APPR1	07/16/2001 1:50:48PM	After	ACADEMIC_DEGREE		
PS	07/16/2001 1:50:48PM	Before	ACADEMIC_DEGREE		
PS	07/16/2001 1:50:09PM	After	ACADEMIC_DEGREE		
	07/16/2001 1:50:09PM	Before	ACADEMIC_DEGREE		

Security Detail page: Component tab

Note. Column order may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar to view all the available columns.

Component Tab

User ID — The user ID of the individual who made changes to the Security View table. For rows where the action is *Delete,* no user ID appears. This is because when a record is deleted from the database, although the trigger can track that the record has been deleted, it cannot track the user ID of the person who deleted it. When deletes occur, the character string ******** appears in the User ID field.

Date/Time — When changes to the Security View table were made.

Action — Actions are the following.

Insert: User inserted a new row in the database.

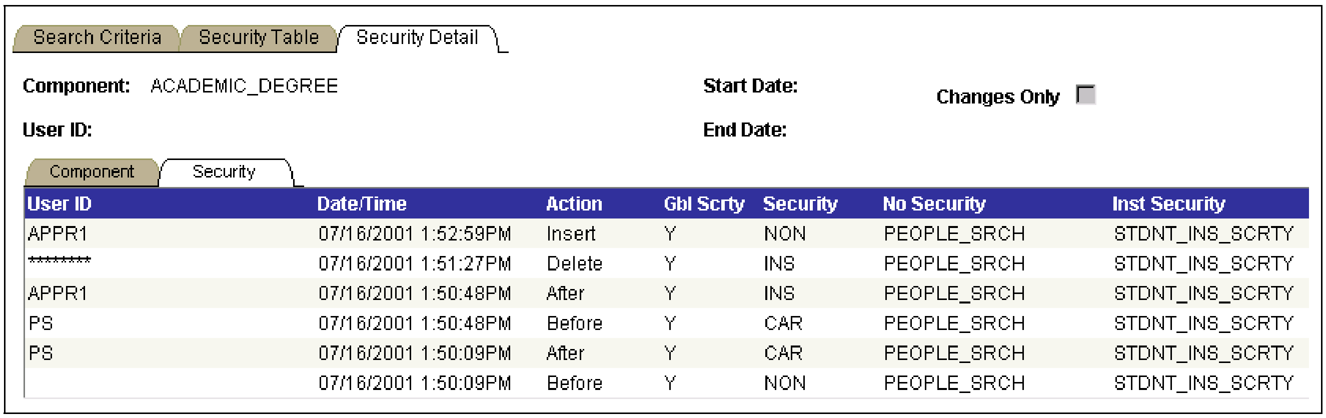
Delete: User deleted a row out of the database.

Before: Image of the record before it was updated.

	After: Image of the record after it was updated.
Component	The component that you selected as part of the search criteria is displayed.
Menu Name	The menu name specified on the Security Views page.
Bar Name	The bar name specified on the Security Views page.

Security Tab

Select the Security tab.


Search Criteria | Security Table | Security Detail

Component: ACADEMIC_DEGREE Start Date: Changes Only

User ID: End Date:

Component | Security

User ID	Date/Time	Action	Gbl Scrty	Security	No Security	Inst Security
APPR1	07/16/2001 1:52:59PM	Insert	Y	NON	PEOPLE_SRCH	STDNT_INS_SCRTY
********	07/16/2001 1:51:27PM	Delete	Y	INS	PEOPLE_SRCH	STDNT_INS_SCRTY
APPR1	07/16/2001 1:50:48PM	After	Y	INS	PEOPLE_SRCH	STDNT_INS_SCRTY
PS	07/16/2001 1:50:48PM	Before	Y	CAR	PEOPLE_SRCH	STDNT_INS_SCRTY
PS	07/16/2001 1:50:09PM	After	Y	CAR	PEOPLE_SRCH	STDNT_INS_SCRTY
	07/16/2001 1:50:09PM	Before	Y	NON	PEOPLE_SRCH	STDNT_INS_SCRTY

Security Detail page: Security tab

Gbl Scrty (global security)	The status of the Global Security check box on the Security Views page. *Y* for selected or *N* for cleared indicates the status of the check box.
Security	Displays the option selected in the Security field on the Security Views page. Options are:
	NON (no access): *No Access* was selected on the Security Views page.
	INS (institution): *Institution Level* was selected on the Security Views page.
	CAR (career): *Career Level* was selected on the Security Views page.
	PRG (program): *Program Level* was selected on the Security Views page.
	PLN (plan): *Plan Level* was selected on the Security Views page.
No Security	The view specified for the component in the No Security View field on the Security Views page.
Inst Security (institutional security)	The view specified for the component in the Institution Security View field on the Security Views page.
Career Security	The view specified for the component in the Career Security View field on the Security Views page.
Program Security View	The view specified for the component in the Program Security View field on the Security Views page.
Plan Security	The view specified for the component in the Plan Security View field on the Security Views page.

Securing Academic Structure

Securing your academic structure involves setting up security for academic institutions, academic institution and academic career combinations, academic programs, and academic plans. It is important to set up security for academic institutions individually and jointly with academic careers because not all pages are keyed by both academic institution and academic career, and not all careers are available for every Institution.

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

- Set security for academic institutions.
- Set security for institution and career combinations.
- Set security for academic programs.
- Set security for academic plans.

See Also

Chapter 6, "Designing Your Academic Structure," page 71

Chapter 10, "Defining Programs, Plans, and Subplans," page 149

PeopleTools: Security, "User Profiles"

Understanding Academic Structure Security

You secure your academic structure by user ID. Give each user ID access to the academic institutions, academic careers, academic programs, and academic plans that the user needs to work with in the system.

Here's how to assign academic structure security to an individual:

1. Define high-level institution security on the Academic Institution Security page.
2. Define career security by institution on the Institution/Career Security page.
3. Define academic program security on the Academic Program Security page.
4. Define academic plan security on the Academic Plan Security page.

Pages Used to Secure Academic Structure

Page Name	Object Name	Navigation	Usage
Academic Institution Security	SCRTY_TABL_INST	Design Student Administration, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security Design Student Administration, Define Contributor Relations, Setup, Secure Institution Table, Institution Table Security	Set security to determine which academic institutions a user can access.
Institution/Career Security	SCRTY_TBL_CAREER	Design Student Administration, Secure Student Administration, User ID, Institution/Career Security, Institution/Career Security	Set secruity for institution and career combinations to determine which a user can access.
Academic Program Security	SCRTY_TABL_PROG	Design Student Administration, Secure Student Administration, User ID, Academic Program Security, Academic Program Security	Set secruity to determine which academic programs a user is able to access for the selected institution and career combination.
Academic Plan Security	SCRTY_TBL_PLAN	Design Student Administration, Secure Student Administration, User ID, Academic Plan Security, Academic Plan Security	Set security to determine which academic plan a user is able to access for the selected academic institution.

Setting Security for Academic Institutions

Access the Academic Institution Security page.

Academic Institution Select an academic institution to which this user ID should have access. You must list all academic institutions to which this user ID should have access.

Setting Security for Institution and Career Combinations

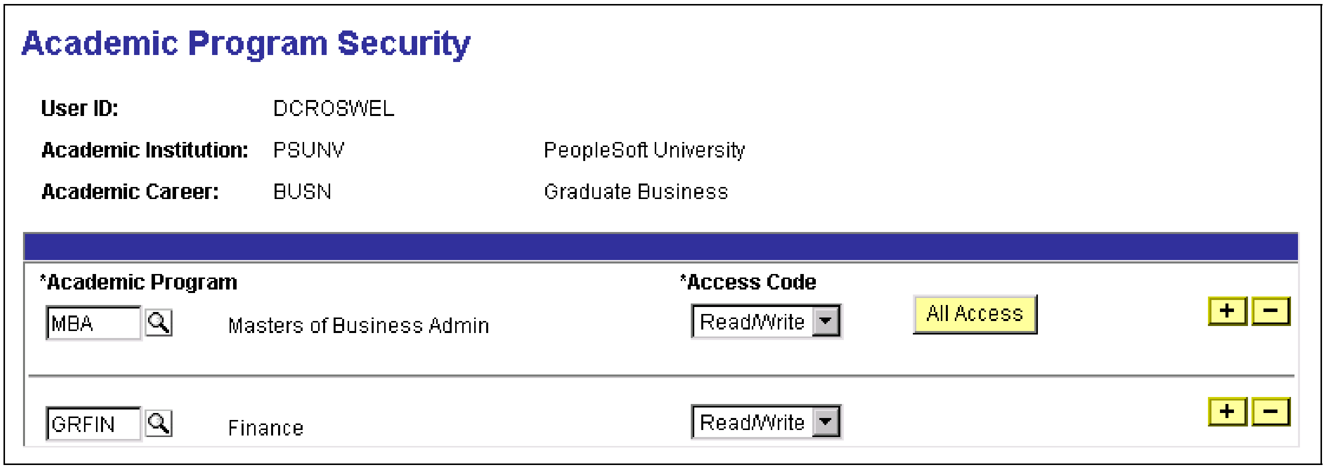
Access the Institution/Career Security page.

Academic Career Select an academic career to assign to the user ID for the selected academic institution. List all of the academic careers that this user ID should be able to use for the selected academic institution.

If a user ID is associated with more than one academic institution, enter career information separately for each institution.

Setting Security for Academic Programs

Access the Academic Program Security page.



Academic Program Security page

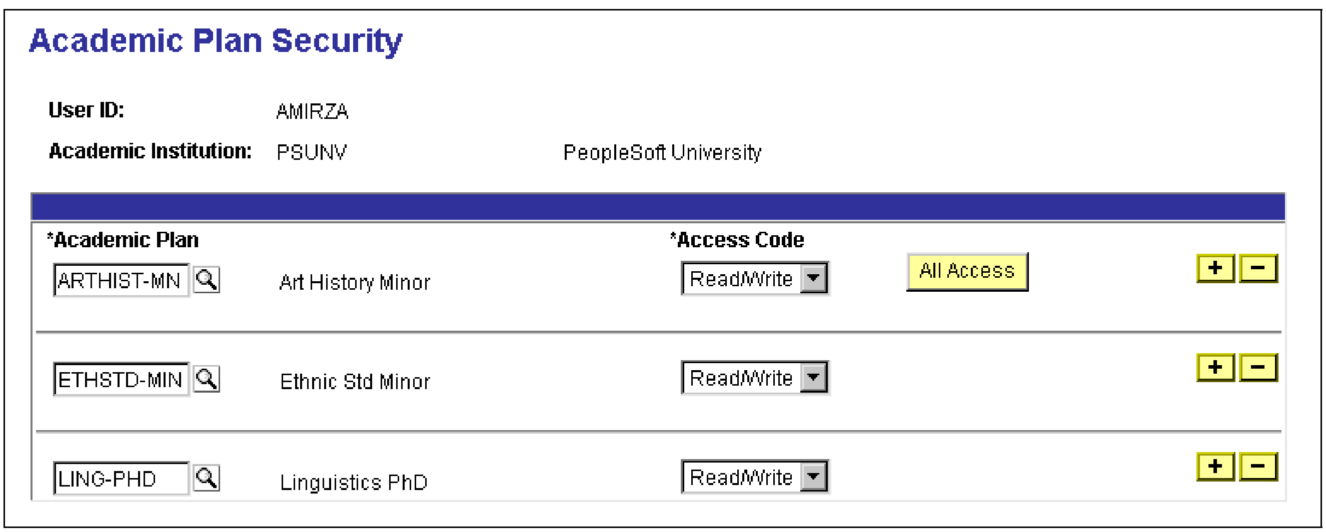
Academic Program

Identify the specific academic programs to which this user ID, with the selected academic institution and academic career combination, should have access.

If a user ID is associated with more than one institution and career combination, enter program information separately for each combination.

Setting Security for Academic Plans

Access the Academic Plan Security page.



Academic Plan Security page

Academic Plan

Identify the specific academic plans to which this user ID, with the selected academic institution, should have access.

If a user ID is associated with more than one academic institution, enter academic plan information separately for each user ID and academic institution combination.

Securing Academic Organizations

This section provides overviews of the academic organization security tree and the difference between security and organizational structures. This section also discusses how to:

- Build security trees for academic organizations.
- Create a new security tree.
- Update the security tree.
- Granting and restricting access in the security tree.

Understanding the Academic Organization Security Tree

Online security is a critical issue in any organization. Because most data in PeopleSoft Student Administration and Contributor Relations Solutions is confidential and sensitive, you want to designate exactly which data users see. Using an academic organization security tree—a security structure that graphically represents the hierarchies of organizational units in your institution—you can view and update the reporting relationships among units and grant and deny user access to data. You can also track changes over time by creating new trees with different effective dates. To set up data security, you create security trees that are based on hierarchies of organizational entities. Using PeopleSoft Tree Manager, you can build a new security tree showing organizational entities such as universities, institutions, and academic departments.

The primary advantage of using a hierarchy for academic organization security is that you do not have to define access rules for every organizational entity, so updating security access is faster than if you had to update user access for each entity. And with a hierarchy, you can more easily deny access to a particular entity.

Each academic organization that you add to the academic organization security tree has a unique identifier—the academic organization code—created on the Academic Organization Table page.

After you create your academic organization security tree, you run a utility that links the effective date of your tree structure with the Academic Organization Security table, where you grant user access to academic organizations. This ensures that your security rules are using the tree with up-to-date academic organization hierarchies. You then run a utility to crosscheck the Academic Organization table and your security tree to ensure that their academic organization data matches.

Use the Academic Organization Security table to grant or restrict user access to academic organizations. When you grant users access to a given academic organization, you automatically grant them access to data in any academic organization that reports directly or indirectly to that academic organization, unless you selectively restrict access to a specific one.

When you use the security structure delivered with PeopleSoft Student Administration and Contributor Relations Solutions, you grant and deny user access to academic organization data using the same user IDs and roles that your system administrator created.

See Also

Chapter 6, “Designing Your Academic Structure,” page 71

PeopleToos: Tree Manager

PeopleTools: Security, "User Profiles”

Understanding Security vs. Organizational Structures

Though you use your organizational structure as the foundation for your data security structure, the two structures are not—and should not be—the same. The primary difference between your organizational structure and your data security structure is that you continue to maintain inactive academic organizations in your security structure. You must do this so users can retrieve historical data associated with the inactive academic organizations.

Unlike an organization chart, a security tree has the following characteristics:

- One security tree can be in effect at a time.

  As a result, historical security is irrelevant.

- Inactive academic organizations always appear on security trees.

  Otherwise, data in defunct academic organizations is inaccessible.

To use trees for reporting purposes to accurately reflect your academic organization chart at a particular point in time, do not use your academic organization security tree. Instead, create a separate academic organization tree. As your organization changes (new academic organizations are created and others become defunct) you can create new effective-dated versions of the academic organization tree. Then, you can easily create queries that extract data from hierarchies, which accurately reflect your academic organization structure at a given point in time.

The steps described for creating an academic organization security tree assume that you have a hierarchy using academic organizations from the Academic Organization table to grant and deny access to user IDs. This is the structure delivered with PeopleSoft Student Administration, and it works well if you use your academic organization structure as the basis for your security structure—that is, users should view only specific portions of data, in certain organizational chunks, and the organizational entities are hierarchical.

Note. You should base your security structure on your security needs *today.* For example, you might have only a few users using PeopleSoft Student Administration for the first six months of implementation, so you probably do not need to set up complex security hierarchies yet. And, you will get enhanced system performance with a less complicated hierarchy. When your security needs change—for example, more users begin using the system—you can easily adapt your security structure.

Pages Used to Secure Academic Organizations

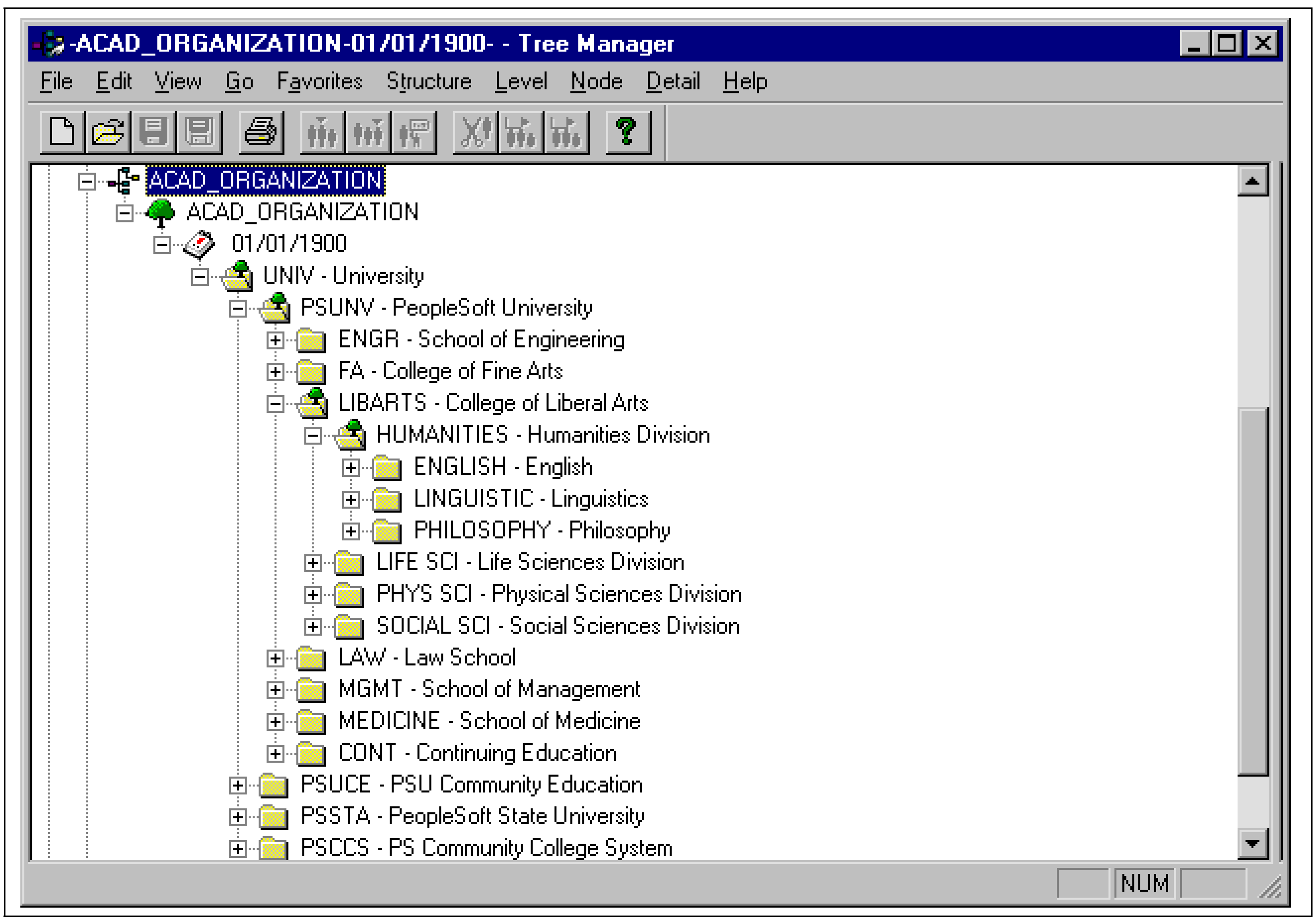
Page Name	Object Name	Navigation	Usage
Update Security - Acad Orgs	RUNCTL_ASOFDATE	Design Student Administration, Secure Student Administration, Process, Update Security - Acad Orgs, Parameters	Link your academic organization security tree to academic organization security so the system recognizes the current effective-dated academic organization security tree.
Academic Org Security	SCRTY_TABL_ACAD	Design Student Administration, Secure Student Administration, User ID, Academic Org Security, Academic Org Security	Grant and restrict access to data for a user ID.

Building Security Trees for Academic Organizations

PeopleSoft Tree Manager offers a powerful visual means to build a security hierarchy for all organizational entities. A tree hierarchy is a quick, graphical method of granting and restricting user access to data in PeopleSoft Student Administration and Contributor Relations Solutions. You do not have to perform regular audits to ensure no circular or conflicting relationships exist among units, as you do with code-based security, a security hierarchy prevents them from occurring in the first place.

You retain the logical groupings of your institutional hierarchy, such as institution and academic department, by representing them as *levels* in the academic organization security tree. The groupings represent a security hierarchy, but they do not have to be the same as your organizational chart.

You use levels and academic organizations to create a hierarchy of security access. For example, users who can access information for *UNIV* (university) can access information for all academic organizations in your institution. On the other hand, users who are granted access to information in *ENGR* (engineering) can access information for only the School of Engineering. Here is an example of a completed academic organization security tree.



Academic organization security tree example

From within PeopleSoft Tree Manager, you can view and update existing academic organization data, and you can create new academic organizations. Double click an academic organization to open the Academic Organization Table page, which contains data for that particular academic organization.

You organize a tree by adding or moving limbs. Whenever you must change the security hierarchy for academic organizations, make a new effective-dated copy of your tree and move limbs to other locations—making the maintenance of your organizational security easier and more accurate. When you add an academic organization to your tree, PeopleSoft Tree Manager links to the Academic Organization table, where you review specific information on the academic organization.

See Also

Chapter 6, "Designing Your Academic Structure," Defining Academic Organizations, page 91

PeopleTools Tree Manager PeopleBook

Creating a New Security Tree

Here's how to create a new security tree:

1. Define the tree structure.

   Identify the page definitions, record definitions, and fields for the underlying database tables where tree data is stored.
2. Define the tree for ACAD_ORGANIZATION on the Tree Definition page.
3. (Optional) Specify organizational levels.
4. Define security for academic organizations on the Academic Org Security page.

Updating the Security Tree

Access the Update Security - Acad Orgs page.

As Of Date Enter the date that the new academic organization security tree is to be active. The Update Security - Acad Org process looks for the academic organization security tree that has an effective date closest to, but not greater than, this date and makes that the active security tree.

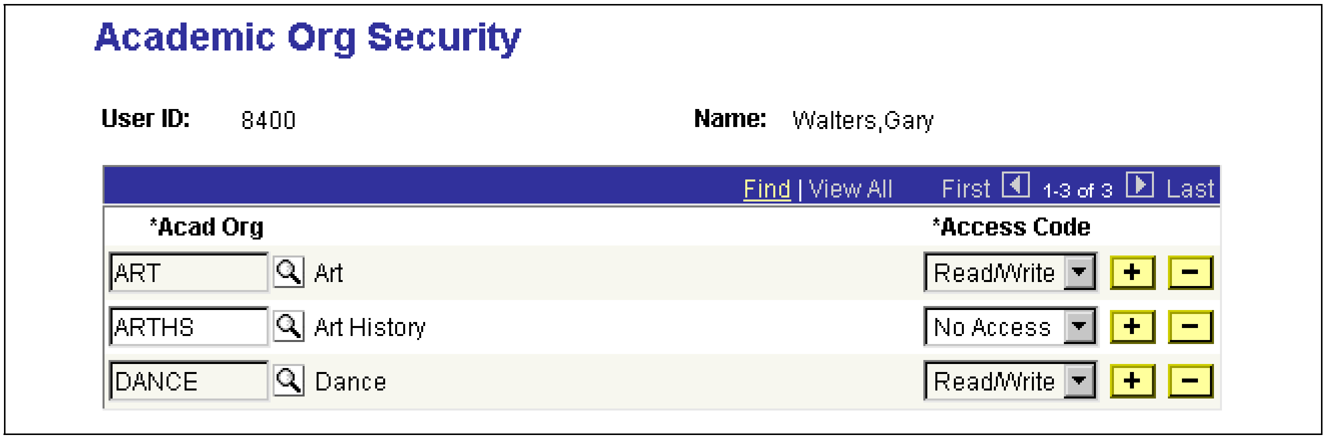
Run Run the Update Security - Acad Org (update security - academic organization) process (SR505) as needed.

You should run this process the first time that you create an academic organization security tree, any time that you create an academic organization security tree with a different effective date, and any time that you make a change to your current academic organization security tree.

Important! Because only one academic organization security tree can be in effect at any given point in time, be sure to run this process only on the date that the new tree takes effect—not before. For example, if your new security tree has an effective date of January 1, 2002 you should run this process on January 1, 2002. The system uses whatever tree has an effective date closest to–but not greater than–the date you enter in the As Of Date field.

Granting and Restricting Access in the Security Tree

Access the Academic Org Security page.



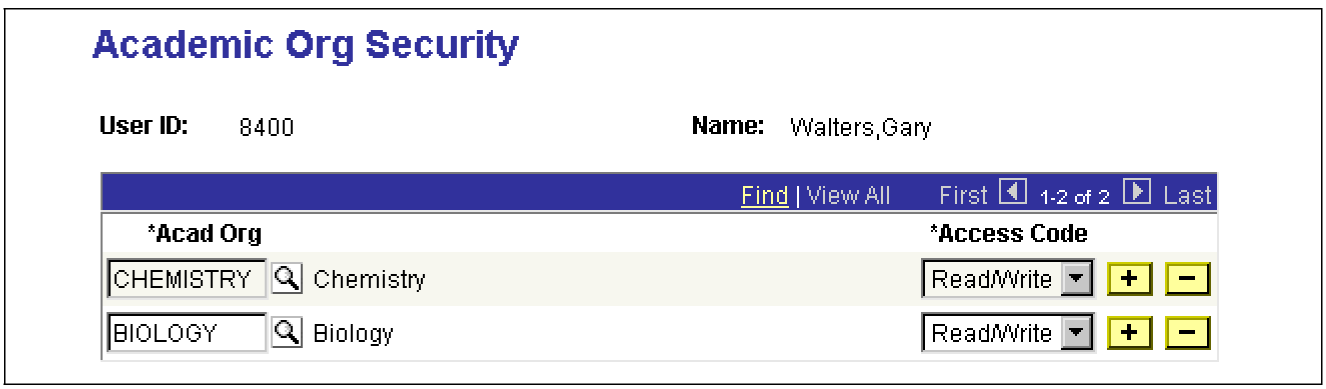
Academic Org Security page

Select the highest academic organization in the hierarchy that this user ID should be able to access. Insert rows to add additional academic organizations or to restrict access to a particular academic organization lower in the hierarchy.

Academic organization security is based on the hierarchy in your academic organization security tree. The academic organization that you identify here must be a node on your academic organization security tree. Granting access to one node of your academic organization tree also provides access to all child nodes for that organization. To restrict access to a child node, select the academic organization that you want to restrict access to and set the access code to *No Access.*

Example 1

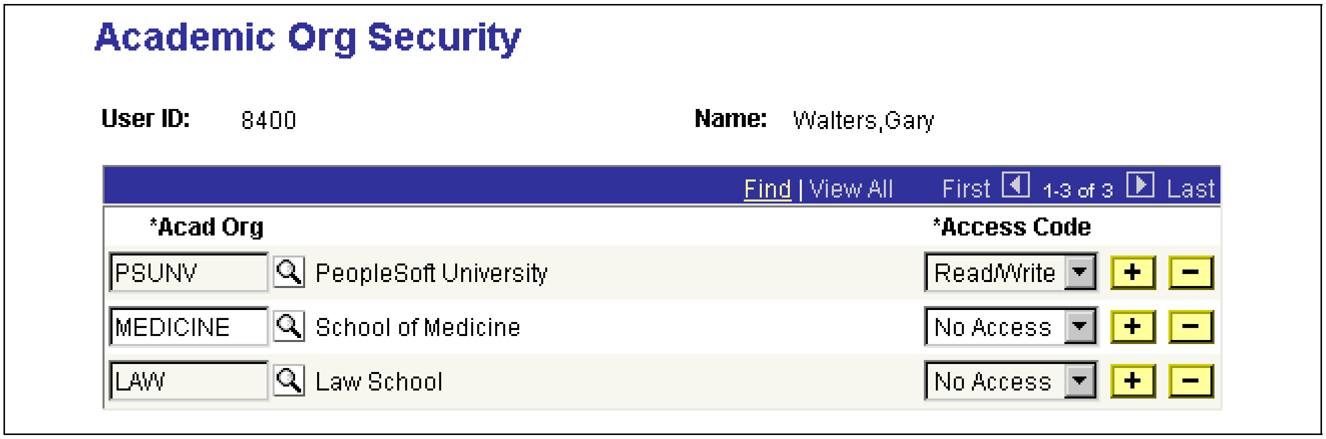
The following security setup would grant this user ID access to all academic organizations under the Biology and the Chemistry nodes in the security tree.



Giving permission for specific academic organizations (SCRTY_TABL_ACAD)

Example 2

The following security setup would grant this user ID access to all academic organizations under the PeopleSoft University node *except* any that fall under the School of Medicine or Law School node. The School of Medicine and Law School are excluded because the access code is set to *No Access.*



Giving permission with restrictions for academic organizations (SCRTY_TABL_ACAD)

CHAPTER 13

Securing Campus Community Security and Copying User Security

This chapter discusses how to:

- Set up 3C group security.
- Set up service indicator security.
- Copy user security.

Setting Up 3C Group Security

You can select which 3C groups the user ID can view and update. The Campus Community 3C engine also uses the security that you set up here. The 3C engine will not process the user's request if the user does not have update access for the 3C value used in the process. 3C groups allow access to specific communication categories, checklist codes, and comment categories.

This section discusses how to grant 3C group security.

Prerequisite

Before you set up 3C group security, set up your 3C groups and complete your institution security setup.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Understanding the 3Cs—Communications, Checklists, and Comments"

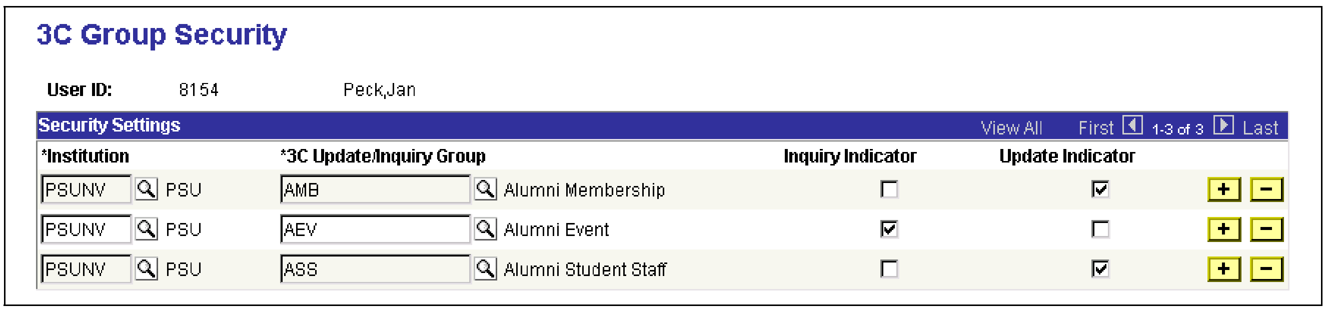
Link to Institutional Security setup in Fundamentals.

Page Used to Set Up 3C Group Security

Page Name	Object Name	Navigation	Usage
3C Group Security	OPR_GRP_3C_TABLE	Design Student Administration, Define Contributor Relations, Setup, 3C Group User Security, 3C Group Security Design Student Administration, Secure Student Administration, User ID, 3C Group Security, 3C Group Security	Grant user access to 3C group information.

Granting 3C Group Security

Access the 3C Group Security page.



3C Group Security page

Institution Select an institution from the available options. Only institutions to which this user ID has been given access are available.

3C Update/Inquiry Group Select the 3C group that the user ID should have access to for the selected Institution.

Inquiry Indicator Select this check box to enable the user ID to *view* all data in the 3C group. The inquiry indicator is used to widen or narrow searches on 3C inquiry pages throughout the system.

Update Indicator Select this check box to enable the user ID to *update*—enter or alter—data in the 3C Group. You should also select this check box if you want the user ID to be able to process 3C items using the 3C engine. If the user ID does not have update access to the 3C group, the 3C engine will not process a request using the 3C group.

Setting Up Service Indicator Security

Indicate if the user can place the service indicator, release the service indicator, or both. You can set access for particular reasons, within a service indicator, to limit the use of the service indicator for a user.

This section discusses how to grant access to service indicators.

Prerequisites

Before you set up service indicator security, set up your service indicators on the Service Indicator Table.

See Also

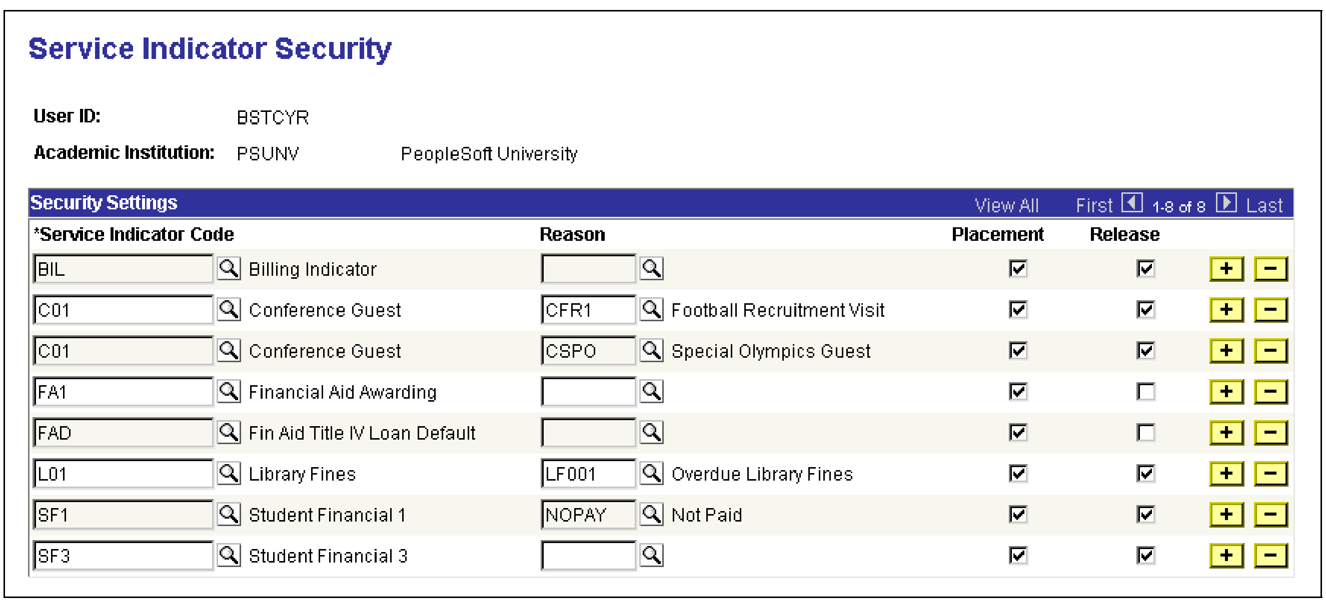
PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Service Indicators"

Page Used to Set Up Service Indicator Security

Page Name	Object Name	Navigation	Usage
Service Indicator Security	SCRTY_TABL_SRVC	• Design Student Administration, Define Contributor Relations, Setup, Secure Service Indicators, Security -- Service Indicator • Design Student Administration, Secure Student Administration, User ID, Service Indicator Security, Security -- Service Indicator	Grant access to service indicators for a user ID for a particular institution.

Granting Access to Service Indicators

Access the Service Indicator Security page.



Service Indicator Security page

Service Indicator Code Select a code for each service indicator that the user ID should be able to access. If you want to restrict the use of a service indicator by reason, enter multiple rows for the service indicator and select the different reasons that apply.

Reason — You can limit the use of a service indicator code by selecting a reason when the user ID can access this service indicator. If you do not select a reason, the user ID can use the service indicator in all cases.

For example, if this user ID should only be able to use the conference guest service indicator for football recruitment visits or Special Olympics guests, select each of those reasons for the conference guest service indicator.

Placement and **Release** — Select if this user ID should have permission to assign or release the service indicator.

Copying User Security

Copying a security setup is the same as going to each appropriate menu and entering data for each security object to assign security for a specific user. Replacement security automates the process for you by enabling you to copy a security profile to another user.

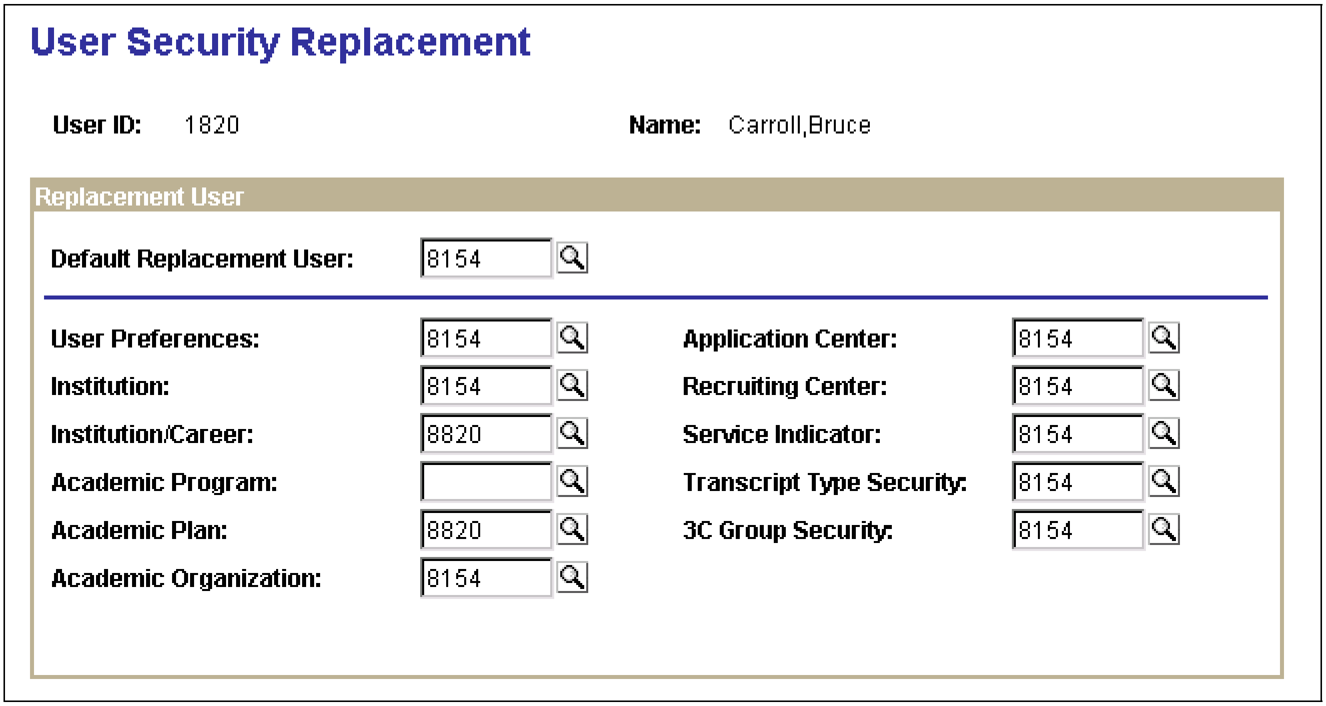
This section discusses how to copy user security setup.

Page Used to Copy User Security

Page Name	Object Name	Navigation	Usage
User Security Replacement	SCRTY_OPRID_REPLAC	Design Student Administration, Secure Student Administration, Setup, User Security Replacement, User Security Replacement	Copy the security setup of one user to another user.

Copying User Security Setup

Access the User Security Replacement page.


User Security Replacement

User ID: 1820 Name: Carroll,Bruce

Replacement User

Default Replacement User: 8154

User Preferences:	8154	Application Center:	8154
Institution:	8154	Recruiting Center:	8154
Institution/Career:	8820	Service Indicator:	8154
Academic Program:		Transcript Type Security:	8154
Academic Plan:	8820	3C Group Security:	8154
Academic Organization:	8154		

User Security Replacement page

Default Replacement User

If you want to replace or create all of this user ID's security with the same security objects assigned to another user ID, specify the user whose security you want to copy in this field. When you exit the field, the system copies each security object from the replacement user and automatically populates the remaining fields with the replacement values for you.

If you do not want to replace each of this user's security with all the security objects of one user ID, indicate the replacement user ID for each object that you want to replace. You do not have to replace all objects. For those objects that you do not want to replace, simply leave the field blank.

User Preferences

Refers to the User Defaults component. When you enter a user ID in this field, the default values that you set up in the User Default component for the entered user ID are assigned to the user ID, including the enrollment override defaults and user 3C group security.

User defaults are set up on the User Defaults component.

See Chapter 20, "Setting User Defaults," page 271.

Institution, Institution/Career, Academic Program, Academic Plan, Academic Organization, Application Center, Recruiting Center, Service Indicator, Transcript Type Security, and **3C Group Security**

All of these fields refer to the security that you set up on the pages in the Design Student Administration, Secure Student Administration, User ID menu. When you enter a user ID in any of these fields, the user ID is assigned the same security that you set up for the selected user ID for that item.

CHAPTER 14

Securing Recruiting and Admissions

This chapter provides an overview of recruiting and admissions security, and discusses how to:

- Set security for recruiting centers.
- Set security for application centers.
- Set security for admissions actions.

Understanding Recruiting and Admissions Security

You secure prospect data through the recruiting center and you secure applicant data through the application center. Access to prospect data or applicant data is given to a user ID by granting access to specified recruiting centers or application centers. If the user ID is not associated with a particular recruiting center, that user ID cannot access prospect data associated with that recruiting center. The same is true for accessing applicant data for a particular application center. You also give access to user IDs for specific program actions, which are associated with recruiting and admissions.

Common Elements Used in This Chapter

Access Code This is set to *Read/Write,* which gives both read and write access to the user.

All Access Click this button to assign access to all recruiting centers, application centers, or admissions program actions for the selected user ID and institution combination.

Setting Security for Recruiting Centers

This section lists prerequisites and discusses how to assign recruiting center access.

Prerequisites

Before you set security for recruiting centers you must:

- Set up your academic institutions and recruiting centers.

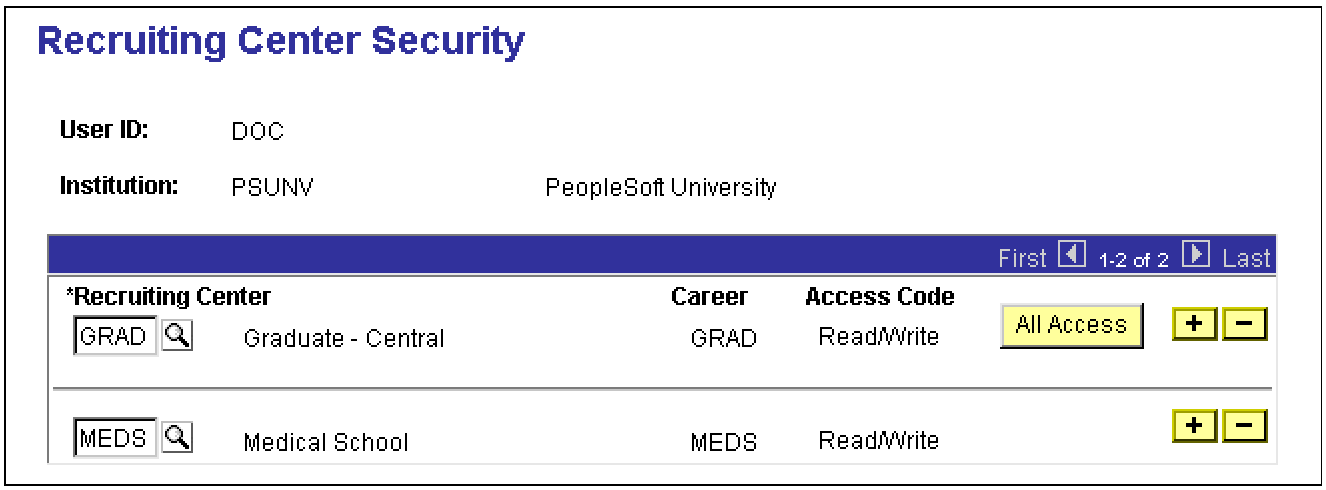
- Set up institution security.
- Set up institution/career security.

Page Used to Set Security for Recruiting centers

Page Name	Object Name	Navigation	Usage
Recruiting Center Security	SCRTY_RECR_CENTER	Design Student Administration, Secure Student Administration, User ID, Recruiting Center Security, Recruiting Center Security	Assign recruiting center access to a specific user ID for an institution.

Assigning Recruiting Center Access

Access the Recruiting Center Security page.



Recruiting Center Security page

Select a Recruiting Center to which this user ID and institution combination should have access. The Career associated with this recruiting center appears.

Setting Security for Application Centers

This section lists prerequisites and discusses how to assign application center access.

Prerequisites

Before you set security for application centers:

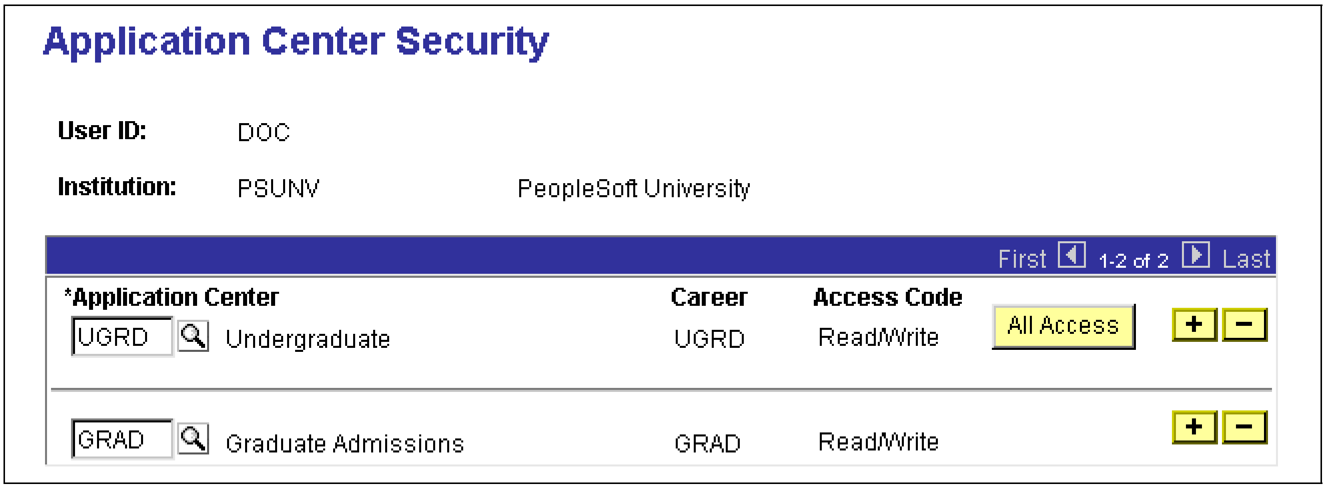
- Set up your academic institutions and application centers.
- Set up institution security.

Page Used to Set Security for Application Centers

Page Name	Object Name	Navigation	Usage
Application Center Security	SCRTY_APPL_CENTER	Design Student Administration, Secure Student Administration, User ID, Application Center Security, Application Center Security	Assign application center access to a specific user ID for an institution.

Assinging Application Center Access

Access the Application Center Security page.



Application Center Security page

Select an Application Center to which this user ID and institution combination should have access. The Career associated with this application center displays.

Setting Security for Admissions Actions

This section lists prerequisites and discusses how to assign program action security.

Prerequisite

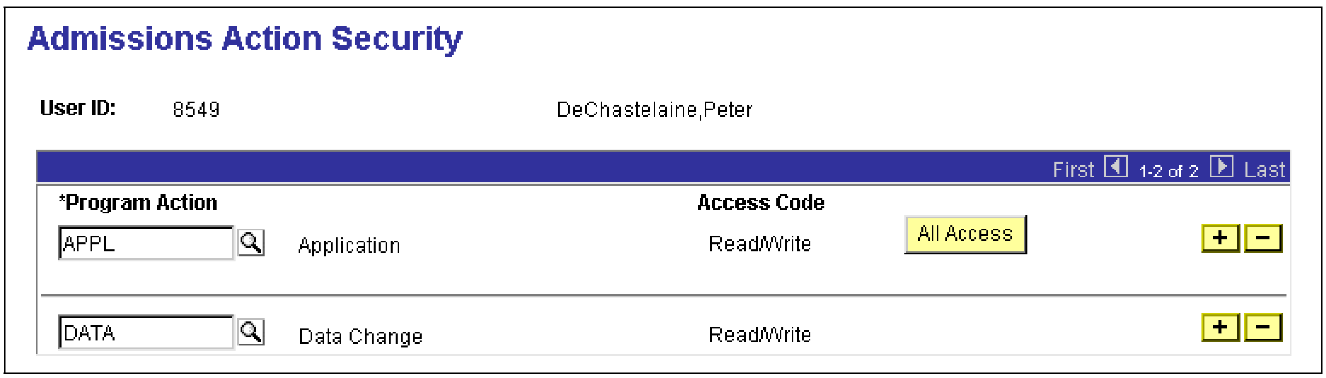
Before you set security for admissions actions, set up program actions.

Page Used to Set Security for Admissions Actions

Page Name	Object Name	Navigation	Usage
Admissions Action Security	SCRTY_ADM_ACTION	Design Student Administration, Secure Student Administration, User ID, Admissions Action Security, Security -- Admissions Action	Assign the program actions that a user ID can access. Users will have access only to the program actions entered on this page. Only program actions used by PeopleSoft Recruiting and Admissions are available.

Assigning Program Action Security

Access the Admissions Action Security page.



Admissions Action Security page

Select the program actions to which the user ID should have access.

CHAPTER 15

Securing Student Records

This chapter provides an overview of PeopleSoft Student Records security and discusses how to:

- Set up enrollment access IDs.
- Set up enrollment access groups.
- Set up enrollment security for user IDs.
- Set up enrollment security for self-service enrollment.
- Set security for program actions.
- Set security for transcript types.

Understanding Student Records Security

PeopleSoft Student Records security setup includes access to enrollment, program actions, and transcript types. You give security for program actions and transcript types by specifying which program actions and transcript types a user ID is allowed to access.

Enrollment security is more complicated and includes setting up enrollment access IDs and enrollment access groups. An enrollment access ID determines the time period when a user can perform certain enrollment functions and the type of overrides to which a user has access. An enrollment access group determines which types of students a user can enroll. It can also control the courses in which a user can enroll a student. You can add enrollment access IDs to enrollment access groups to limit the time period when the user can perform enrollment functions for the types of students.

Enrollment access IDs or enrollment access groups are assigned to user IDs for administrative users. For student self-service users, you assign enrollment access IDs to permission lists, which are assigned to students.

Prerequisites

Before you set up enrollment access IDs, for each term within academic career, you must:

- Set up your time periods and associate them with sessions. Several time periods are delivered with your system, and you can add additional time periods if needed.
- Set up valid time periods for every academic career on the Time Period Table page.
- Attach time periods to sessions and specify the dates for each time period for the sessions within a term on the Session Time Periods page.

See Also

"Establishing Terms and Sessions," Defining Terms and Sessions, Setting Up Session Time Periods

Setting Up Enrollment Access IDs

Enrollment access IDs determine when users can perform certain enrollment functions during a specified time period. For example, you can allow advisors to enroll students in classes only during the first two weeks of classes. Enrollment access IDs can also include overrides to allow the user to override certain enrollment rules, for example, overriding a class size limit. You assign enrollment access IDs to user IDs for administrative users and to permission lists for student self-service users.

Set up enrollment access IDs for the different groups of people who work with student enrollment. Create groups based on the different type of access that the people in these groups should have for each enrollment function. Groups might include advisors, clerks in the registrar's office, and registrar staff. Each group should have different types of access. You must also create enrollment access IDs to be used specifically for self-service enrollment.

This section discusses how to:

- Define access for enrollemnt functions
- Define enrollment overrides

See Also

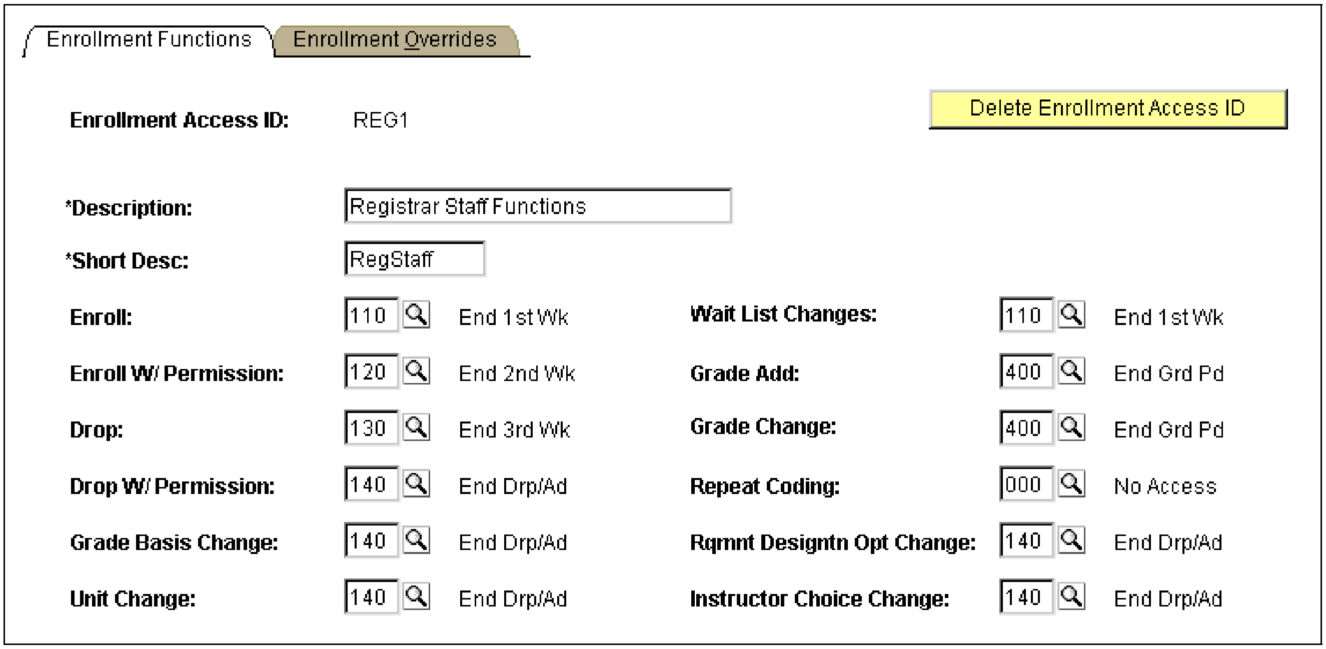
Chapter 15, "Securing Student Records," Setting Up Enrollment Security for Self-Service Enrollment, page 220

Pages Used to Set Up Enrollment Access IDs

Page Name	Object Name	Navigation	Usage
Enrollment Functions	ENRMT_OVRD_TBL	Design Student Administration, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Functions	Define access for enrollment functions by creating enrollment access IDs and assigning time periods to various enrollment functions. The time periods define when the enrollment access ID can access each function. You attach these enrollment access IDs to user IDs, permission lists, and enrollment access groups.
Enrollment Overrides	ENRMT_OVRD_TBL2	Design Student Administration, Secure Student Administration, Setup, Enrollment Security Table, Enrollment Overrides	Define which enrollment overrides the enrollment access ID can use.

Defining Access for Enrollment Functions

Access the Enrollment Functions page.



Enrollment Functions page

For each enrollment access ID that you create, you grant access to enrollment functions by attaching a time period code to each enrollment function. Time period codes set the date to which the enrollment access ID has access to the specific enrollment action. Use time period code *999* to grant unrestricted access, and use time period code *000* to give no access.

Enroll
For enrolling a student.

Enroll W/Permission (enroll with permission)
For enrolling a student in a class after the regular enrollment period is over. A student needs permission to enroll in this period.

Important! If you set the Enroll W/Permission field to time period *999* (unrestricted time access), the system always grants access to a user connected to this enrollment access ID whenever that user attempts to enroll with or without permission, regardless of the time period associated with the Enroll field.

Drop
For dropping a student.

Drop W/Permission (drop with permission)
Separate functionality to check for permission when dropping a student is not currently available. Use this field if you want to assign two drop deadline periods. The later time period in the Drop or Drop W/Permission field is the effective drop deadline.

Grade Basis Change
For changing a student's grading basis for a class.

Unit Change
For changing units.

Wait List Changes
To allow changes to a student's waiting list position.

Grade Add	To allow adding a grade for a student.
Grade Change	To allow changing a grade for a student.
Repeat Coding	To allow attaching a repeat code to a student for a class. The repeat code is found on the enrollment processing pages.
Rqmnt Designtn Opt Change (requirement designation option change)	To allow changes to requirement designations for a student's class.
Instructor Choice Change	To allow changing instructors for a class, if this option is set up for the class.
Delete Enrollment Access ID	Click to delete this enrollment access ID. After you click the button, you have the opportunity to cancel the deletion.

Explanation of Processing

When the enrollment engine checks to see if a user can perform a certain enrollment function it does the following:

- Retrieves the user's enrollment access ID.
- Checks which enrollment function the user is trying to complete, such as enroll, drop, etc.
- Looks at the time period associated with the enrollment function on the Enrollment Functions page, using the user's enrollment access ID.

  The enrollment engine also evaluates the overrides to which a user has access.
- Accesses the Session table and retrieves the end date for the time period.
- Compares the system date with the end date for the time period.

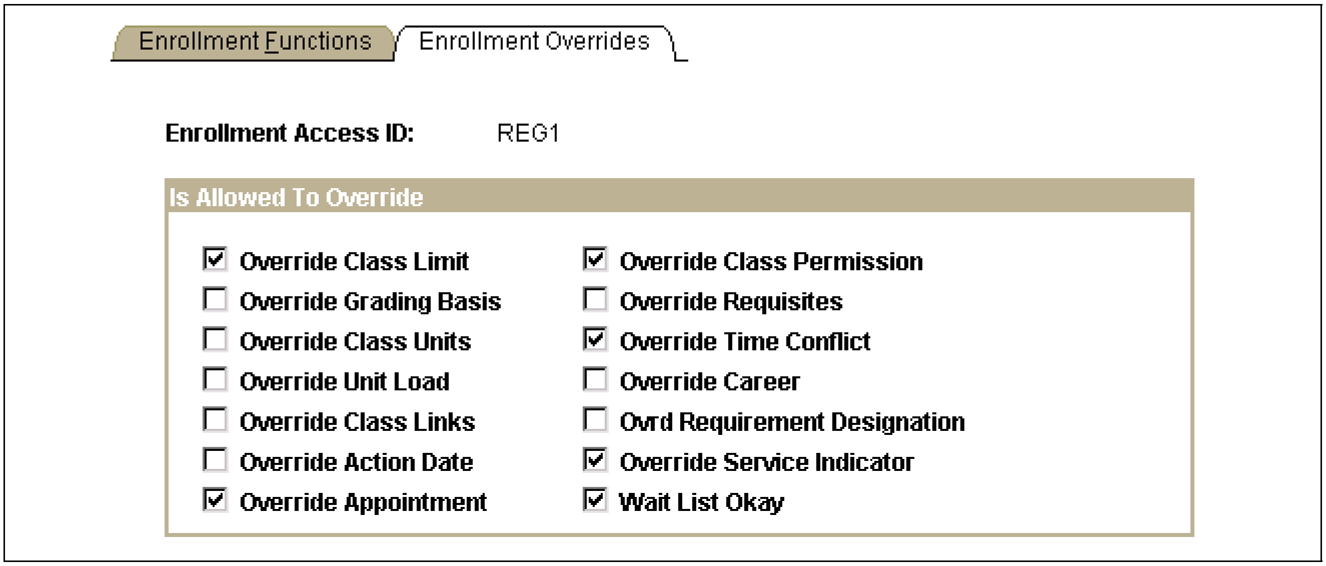
  If the system date is less than or equal to the end date for the time period, access for that enrollment function is granted.

Example

You are attempting to enroll a student in a class scheduled in the regular academic session. The regular academic session time period 110 has an end date of August 29, 2002. If the action date for the enrollment is greater than August 29, 2002, the system denies access to the enrollment function. If you have defined an enroll-with-permission time period (for example, time period 120), the system requires permission for enrollment.

Defining Enrollment Overrides

Access the Enrollment Overrides page.



Enrollment Overrides page

Select the override options that this enrollment access ID is permitted to use. The overrides that you select here are used on the Enrollment Request page for users assigned this enrollment access ID.

Override Class Limit Allows enrollment in classes that are closed due to capacity size (full class section, combined section, or reserve capacity sizes). Also allows putting a student on the waiting list if waiting list capacity is full.

Override Grading Basis Allows override of the grading basis established for the class.

Override Class Units Allows override of course units for either fixed or variable units.

Override Unit Load Allows override of any unit limits, minimum or maximum. These include unit load for appointment, term and session unit load, term and session course count load, term and session *No GPA* units, term and session *Audit* units, wait list units, minimum unit enrollment check.

Override Class Links Allows an add or drop without all the required related component sections in a class association group. Allows enrollment into a nonenrollment type section. Allows multiple enrollments in a course.

Override Action Date Makes the Action Date field available so you can enter a different processing date.

Override Appointment Allows override of appointment date and time to change the appointment maximum enrollment units.

Override Class Permission Allows override of class consent—for general permission or student-specific permission—to enroll in a class.

Override Requisites Allows override of requisite checking.

Override Time Conflict Allows override of class section time conflict-checking.

Override Career Allows override of academic career pointers and career pointer exception rules.

Ovrd Requirement Designation (override requirement designation)	Allows adding a requirement designation for a class that does not have one. Also allows omitting a requirement designation that is required.
Override Service Indicator	Overrides any holds that the student has and allows enrollment.
Wait List Okay	Allows you to add a student to the waiting list of a class section when the class section, combined section, or reserve capacity is full.

Setting Up Enrollment Access Groups

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

- Define students for enrollment group access.
- Define access to courses and assign enrollment access IDs.

Understanding Enrollment Access groups

You use enrollment access groups to allow or restrict enrollment access to a certain group of students; for example, undergraduate athletes or students in the law career. You can define student groups using any combination of academic institution, academic career, academic program, academic plan, or student group. You can further restrict enrollment for the student group by assigning enrollment access IDs to limit the time periods when certain enrollment functions are allowed. In addition, you can restrict the enrollment for the student group to courses from a certain academic organization, to specific course catalog numbers, or to specific sessions.

You can also set up enrollment access groups that deny access to a certain group of students or that deny enrollment to courses from a certain academic organization, specific catalog numbers, or sessions. If you set up an enrollment access group that denies access to certain groups of students, that enrollment access group cannot be used to give access to a different group. Similarly, if you choose to deny access to certain types of courses for certain groups of students, you cannot add further rules that allow access.

Prerequisites

Before you can set up enrollment access groups, you must:

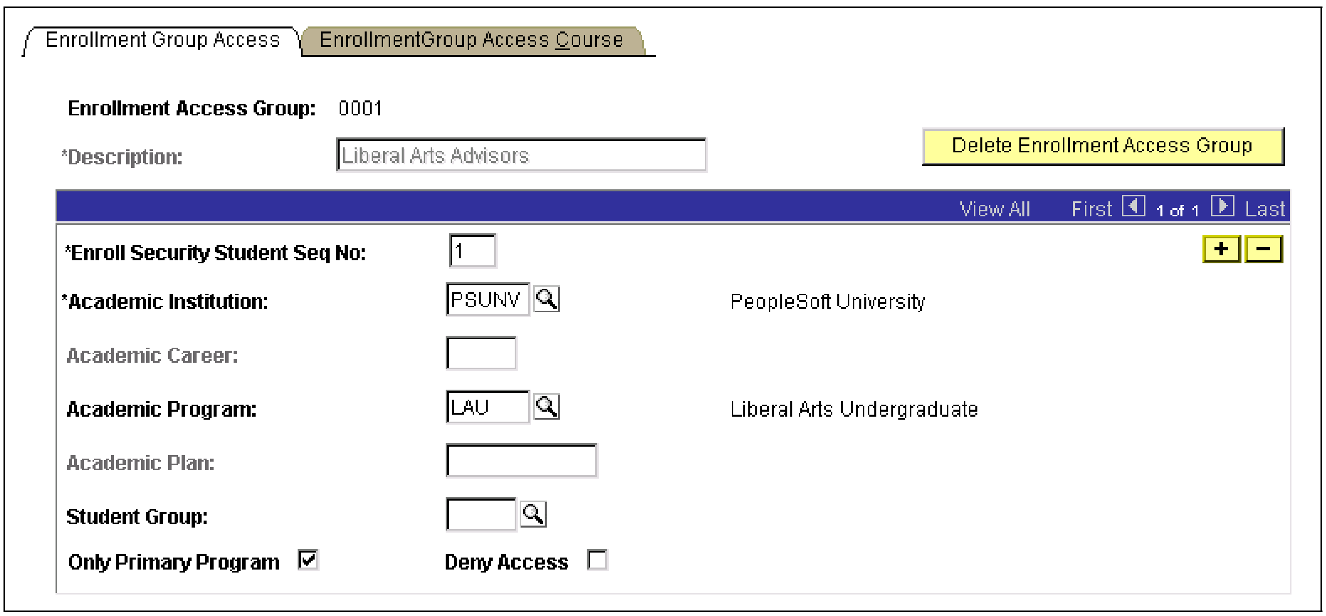
- Set up your academic institutions, academic careers, academic programs, academic plans, and student groups.
- Set up enrollment access IDs, academic organizations, course catalog, and session information.

Pages Used to Set Up Enrollment Access Groups

Page Name	Object Name	Navigation	Usage
Enrollment Group Access	ENRL_GROUP_ACCESS	Design Student Administration, Secure Student Administration, Setup, Enrollment Group Access, Enrollment Group Access	Define students for enrollment group access.
Enrollment Group Access Course	ENRL_GROUP_ACCESS2	Design Student Administration, Secure Student Administration, Setup, Enrollment Group Access, EnrollmentGroup Access Course	Define access to courses for the student group created on the Enrollment Group Access page. You can also assign an enrollment access ID to the student group.

Defining Students for Enrollment Group Access

Access the Enrollment Group Access page.



Enrollment Group Access page

Description Enter the description for this enrollment access group. You can only enter a description in this field for a new value. After the page is saved, you cannot change the description.

Delete Enrollment Access Group Use to delete this enrollment access group. After you click the button, you have the opportunity to cancel the deletion.

Enrollment Security Student Seq No (enrollment security student sequence number) This number is a counter for each group of students that you define. When you insert additional rows to define parameters for additional student groups, the number increments by one. This field appears on the Enrollment Group Access Course page so you can define your course information for each group.

Academic Institution Select the academic institution that this enrollment access group can access.

Academic Career Select the academic career within the selected academic institution that this enrollment access group can access. If you select an academic career, you cannot select an academic program or academic plan.

Academic Program Select the academic program within the selected academic institution that this enrollment access group can access. If you select an academic program, you cannot select an academic career or academic plan.

Academic Plan Select the academic plan within the selected academic institution that this enrollment access group can access. If you select an academic plan, you cannot select an academic career or academic program.

Note. You can only specify an academic career *or* an academic program *or* an academic plan, but not a combination of these.

Student Group Select the student group that this enrollment access group can access. You define student groups in PeopleSoft Student Records.

Only Primary Program Select this check box to grant access only to students whose primary academic program matches the academic program selected. If you select this check box, the user cannot access students whose secondary academic program matches the academic program selected.

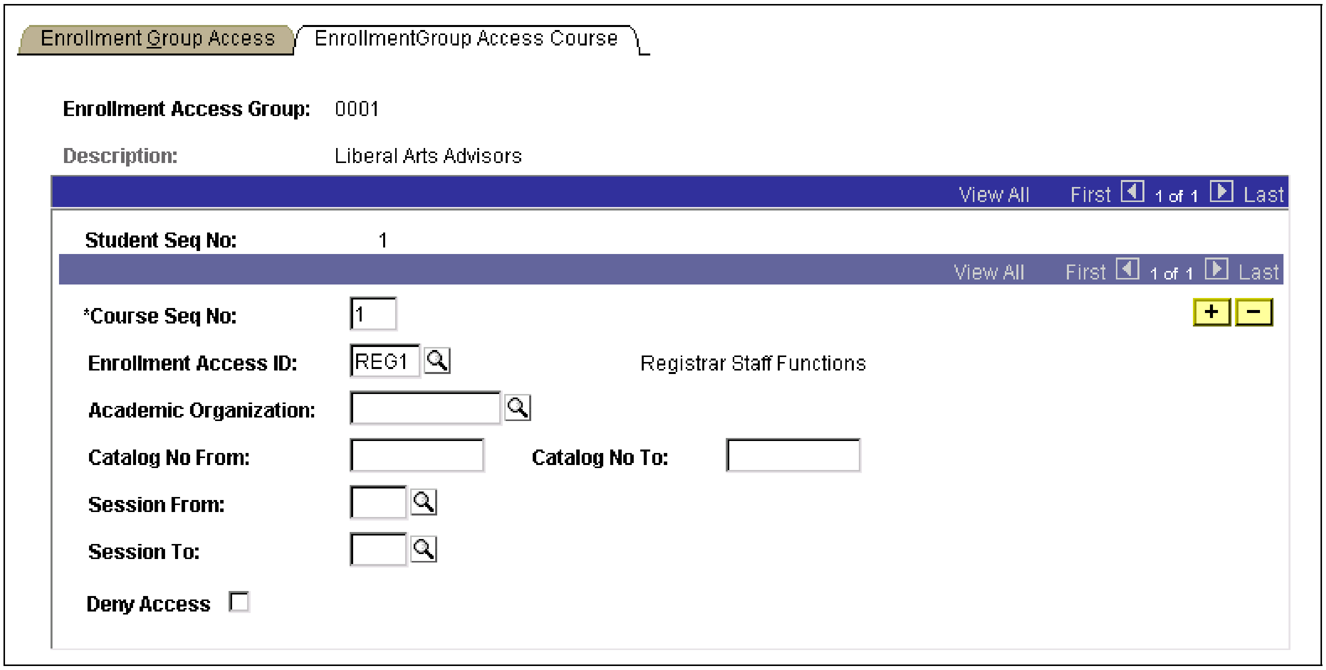
This check box is only available if you entered a value in the Academic Program field.

Deny Access Select this check box to deny access to the specified group of students. If you select Deny Access for one group of students (identified by the enrollment security student sequence number), deny access for any subsequent groups of students that you define for the enrollment access group.

Warning! When this page is saved, the selected access for this enrollment access group becomes effective immediately.

Defining Access to Courses and Assigning Enrollment Access IDs

Access the Enrolment Group Access Course page.



Enrollment Group Access Course page

Student Seq No (enrollment security student sequence number)

This is the same field used to count the student groups defined on the Enrollment Group Access page. For each student group, you can define different parameters.

Course Seq No (course sequence number)

This counts each set of parameters for course enrollment—enrollment access ID, academic organization, catalog numbers, and sessions—within each Student Seq No.

For example, for a group of students you might allow enrollment in two academic organizations. In this case, you would have two course sequence numbers, one to define each academic organization.

Enrollment Access ID, Academic Organization, Catalog No From (catalog number from), **Catalog No To** (catalog number to), **Session From,** and **Session To**

Select any combination of these fields. Each of these fields creates different parameters for limiting enrollment of the student group. These fields are also described individually below.

Enrollment Access ID

Choose an enrollment access ID if you want to attach a defined set of allowable enrollment functions and overrides to the enrollment access group. You define enrollment Access IDs on the Enrollment Functions page.

The Enrollment Access ID is not a required field. If you do not enter an enrollment access ID on this page, all enrollment functions are allowed for all time periods during the session for the students and courses specified for the enrollment group access.

Academic Organization

Select an academic organization in which you want to allow the student group to enroll. If you do not select any value, then the student group can be enrolled in classes in any academic organization, unless you specify a catalog number range.

Catalog No From and **Catalog No To**	Select the catalog number range in which you want to allow the student group to enroll. Entering a catalog number range allows students in the defined student group to be enrolled in courses within the range. If you want to include more than one range of catalog numbers, add another row to define the second catalog number range.
Session From and **Session To**	Select the session range in which you want to allow the student group to enroll. You can have more than one range of sessions by adding a row.
Deny Access	Select this check box to prevent enrollment in the selected parameters. For example, if you select the Deny Access check box, the range of the courses selected are the courses in which the student group *cannot* be enrolled. All other courses would be available. If you select Deny Access for one course sequence number, select it for any subsequent course sequence numbers that you define for the student group. Each student group has its own student sequence number. **Note.** You do not need to select an enrollment access ID if you select Deny Access because you are denying access for all time periods and functions.

Warning! When this page is saved the selected access for this enrollment access group becomes effective immediately.

Setting Up Enrollment Security for User IDs

This section lists prerequisites and discusses how to define enrollment security for user IDs.

Prerequisites

Before you can create enrollment security for User IDs, you must set up enrollment access IDs and enrollment access groups.

See Also

Chapter 15, "Securing Student Records," Setting Up Enrollment Access IDs, page 210

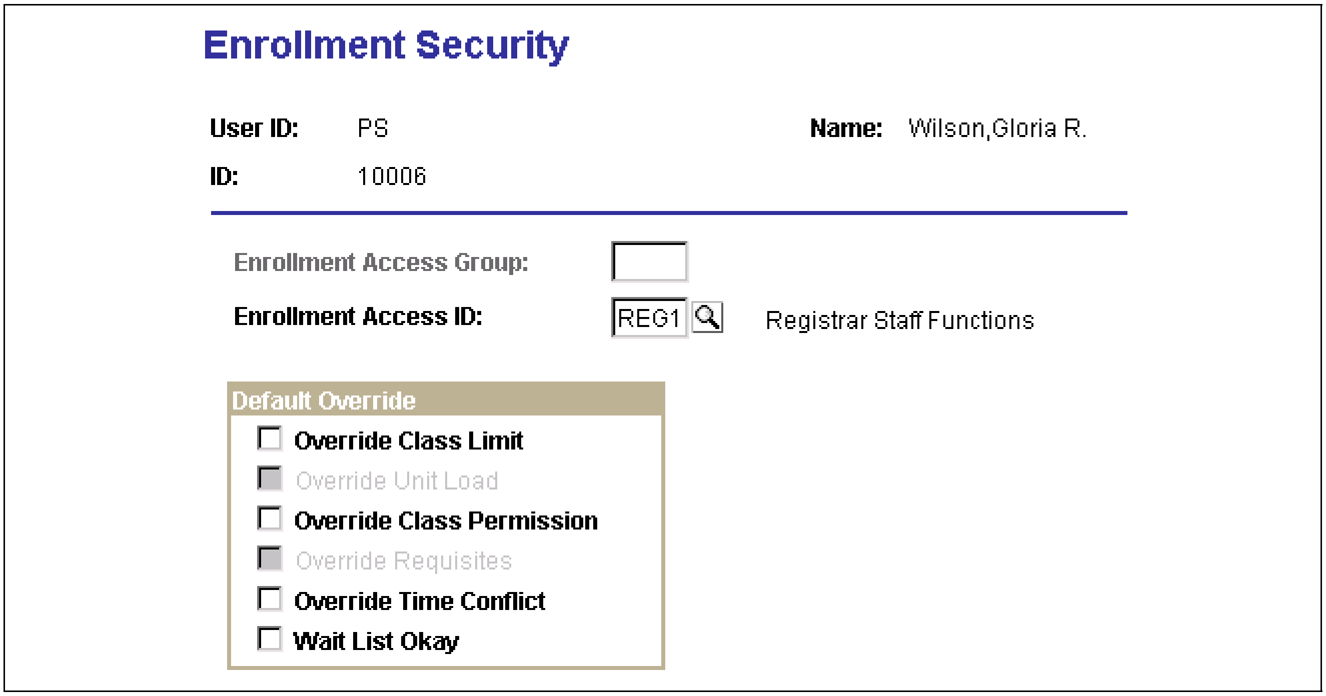
Chapter 15, "Securing Student Records," Setting Up Enrollment Access Groups, page 214

Page Used to Create Enrollment Security for User IDs

Page Name	Object Name	Navigation	Usage
User ID - Enrollment Security	OPR_SA_ACCESS	Design Student Administration, Secure Student Administration, User ID, Enrollment Security, Enrollment Security	Define enrollment security for user IDs by assigning either an enrollment access group or an enrollment access ID to a specific user ID. Also to assign additional default enrollment overrides.

Defining Enrollment Security for User IDs

Access the User ID — Enrollment Security page.



User ID - Enrollment Security page

You can grant a user ID enrollment access by enrollment access group *or* by enrollment access ID, but not both.

Enrollment Access Group Select an enrollment access group to grant the user ID access to enrollment for specific groups of students. The Default Override group box is not available if you select an enrollment access group.

Note. When a user's enrollment security is controlled by enrollment access group, override security is enforced when an enrollment request is processed by the enrollment engine.

Enrollment Access ID Select an enrollment access ID to grant the user ID access to enrollment functions during specific time periods within the session. When you select an enrollment access ID and exit the field, the system checks against the ENRMT_OVRD_TBL and makes available the overrides allowed for the selected enrollment access ID.

Note. When a user's enrollment security is controlled by enrollment access ID, only those overrides that have been authorized are available for use on the Enrollment Request and Quick Enroll pages.

Override Class Limit, Override Unit Load, Override Class permission, Override Requisites, Override Time Conflict, and **Wait List Okay**

If you are granting the user ID access by enrollment access ID, select the override options that you want to set as default overrides for this user ID. You can select only those default overrides that are allowed for the enrollment access ID. The override defaults are available on enrollment pages.

See Also

Chapter 15, "Securing Student Records," Setting Up Enrollment Access IDs, page 210

Chapter 15, "Securing Student Records," Defining Enrollment Overrides, page 212

Setting Up Enrollment Security for Self-Service Enrollment

This section provides an overview, prerequisites and discusses how to:

- Define self-service enrollment permission lists.
- Assign enrollment access to permission lists.

Understanding Self-Service Enrollment Security

When a student selects a term for enrollment, they are transferred to the View My Schedule page. At this point PeopleCode is used to evaluate the roles attached to the student's user ID. The Self Service Enrollment Permission List defined on the Self Service Enrollment Permission List Definition page must be attached to the student's role(s). The search is conducted using the institution/term combination the student selects from the term listing page.

For example, when a student selects the Fall 2001 term at PSUNV, the system looks through all of the roles attached to his or her user ID and checks whether the permission list (in the case of PSUNV) 'SASTDNT' exists. If yes, the student is allowed to continue with the enrollment process. If the Permission List is not found, the Add, Swap, and Update links are hidden and the message "You are not authorized for self service enrollment at this time" is shown on the page.

If a student passes the above verification step, subsequent enrollment transactions are subject to enrollment engine security checks. When an enrollment request is submitted, the enrollment engine uses the Enrollment Access ID attached to the Self Service Permission List to evaluate time period security as usual.

Here's how to set up security for self-service enrollment:

1. Create a self-service permission list for student self-service enrollment on the Permission Lists page (PeopleTools, Maintain Security, Use, Permission Lists).

2. Create a role for student self-service on the Roles component (PeopleTools, Maintain Security, Use, Roles). Attach the permission list created in step 1 to this role.
3. Attach an Enrollment Access ID to the permission list created in step 1 using the Permission List – Enrollment Security page.
4. Specify the Self Service Enrollment Permission List for your institution using the Self Service Enrollment Permission List page.

Prerequisite

Before you can set up self-service enrollment security, you must:

- Create the role for student self-service on the Roles page.
- Set up a self-service enrollment permission list on the Permission List page.
- Set up Enrollment Access IDs on the User ID -Enrollment Security page.

Pages Used to Define Self-Service Enrollment Security

Page Name	Object Name	Navigation	Usage
Self-Service Enrollment Permission List Definition	SA_SS_ENRL_PERM	Design Student Administration, Secure Student Administration, Setup, Self-Serv Enrollment Perm List, Self-Service Enrollment	Define self-service enrollment permission lists.
Perm List - Enrollment Security	OPRCLASS_DEF_SA	Design Student Administration, Secure Student Administration, Perm List, Enrollment Security, Enrollment Security	Assign an enrollment access ID to a permission list. Permission lists are then assigned to students to give them access to self-service enrollment functions.

Defining Self-Service Enrollment Permission Lists

Access the Self Service Enrollment Permission List Definition page.

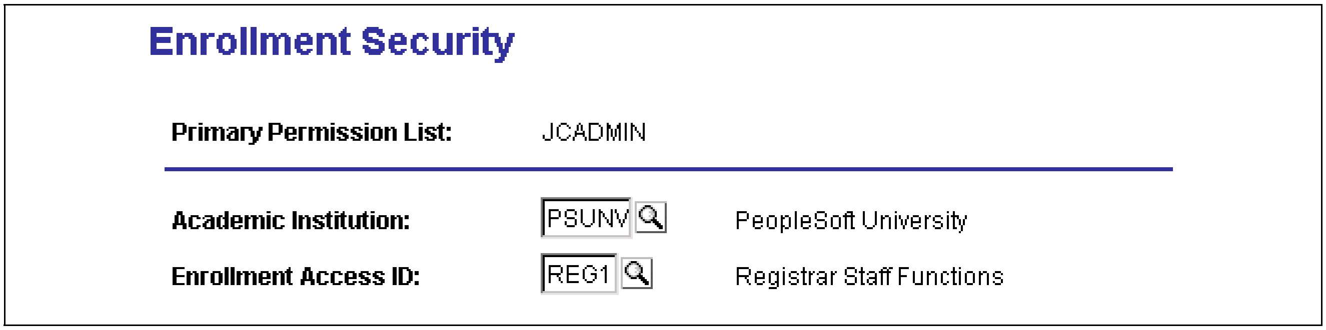
Self Service Enrollment Permission List Definition page

Permission List Select the self-service permission list you created. The academic institution is associated with the permission list.

Delete Use to delete the academic institution/permission list combination defined on the page. In the above example, the PSUNV/SASTDNT row would be deleted from the table. A warning message is given when you click the Delete button.

Assigning Enrollment Access to Permission Lists

Access the Perm List — Enrollment Security page.



Perm List - Enrollment Security page

Academic Institution Select an academic institution that a student should have access to for self-service enrollment using this permission list.

Enrollment Access ID Select an enrollment access ID to allow students using this permission list access to the enrollment functions during the time periods specified in the enrollment access ID.

Setting Security for Program Actions

This section lists prerequisites and discusses how to define program action security.

Prerequisite

Before you can set up program action security, set up your program actions on the Program Action Table page.

See Also

Chapter 15, “Securing Student Records,” Setting Security for Program Actions, page 222

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Setting Up for Admissions Program Actions and Statuses,” Setting Up for Admissions Program Actions and Statuses

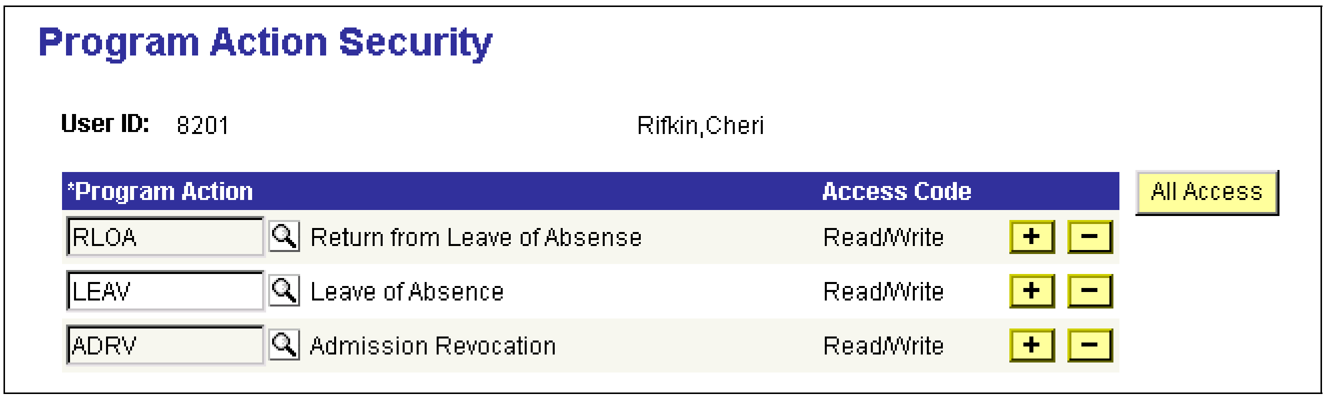
PeopleSoft 8 SP1 Student Records PeopleBook, “Managing Students’ Programs, Plans, and Subplans,” Explaining Program Actions and Statuses

Page Used to Set Security for Program Actions

Page Name	Object Name	Navigation	Usage
Program Action Security	SCRTY_PROG_ACTION	Design Student Administration, Secure Student Administration, User ID, Program Action Security, Security -- Program Action	Define program action security by assigning a user ID to specific program actions. If you do not give the user ID access to program actions on this page, the user ID cannot perform any program actions.

Defining Program Action Security

Access the Program Action Security page.



Program Action Security page

Program Action Select a program action to which this user ID should have access. The access code is set to *Read/Write.*

All Access Click this button to assign access to all program actions for this user ID.

Setting Security for Transcript Types

This section lists prerequisites and discusses how to define transcript type security.

Prerequisite

Before you can define transcript type security, set up your transcript types through the Transcript Type component.

Note. Transcript type security does not affect access to transcript types in Learner Services or Learning Management self-service applications

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transcripts”

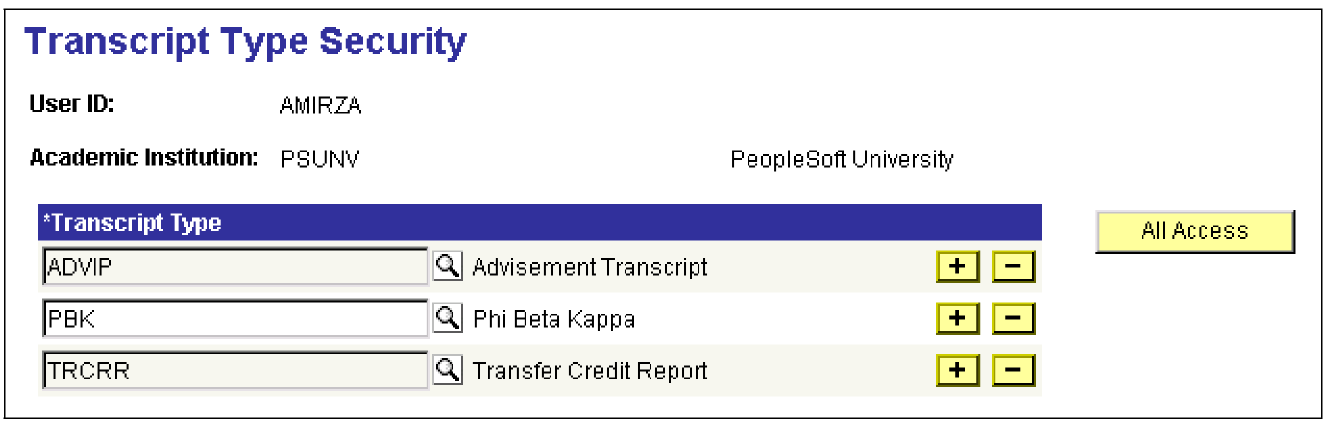
PeopleSoft 8 SP1 Student Records PeopleBook, “Producing Transcripts”

Page Used to Set Security for Transcript Types

Page Name	Object Name	Navigation	Usage
Transcript Type Security	SCRTY_TSCRPT_TYPE	Design Student Administration, Secure Student Administration, User ID, Transcript Type Security, Transcript Type	Set transcript type security for a user ID and a particular institution. When the user attempts to process a transcript on the Transcript Request page, the Batch Transcript Request page, or the Batch Transcript Generation page, the user can select only those transcript types for which they have security.

Defining Transcript Type Security

Access the Transcript Type Security page.



Transcript Type Security page

Transcript Type Select a transcript type for which this user ID and academic institution combination should have processing access.

Note. PeopleSoft recommends that institutions do not define a transcript type of *ALL* because the system uses this value to grant users access to all transcript types.

CHAPTER 16

Securing Student Financials

This chapter provides an overview of PeopleSoft Student Financials security and discusses how to:

- Set security views.
- Set security options.
- Update PeopleSoft Student Financials security settings.
- Set security for set IDs.
- Set security for business unites and cashier offices.
- Set security for item types.
- Set security for institution sets.
- Override the Self-service Institution Set.
- Set security for companies.
- Set security for origin IDs.
- Set security for credit cards.

Understanding PeopleSoft Student Financials Security

In PeopleSoft Student Financials you can set security for set IDs, business units, cashier offices, item types, institution sets, companies, origin IDs, and credit cards. For each of these items, you can select to have no security, user ID security, or permission list security. You can use any of the three types of security, and you do not need to use the same type of security throughout the application. For example, you could select no security for origin IDs, user ID security for business units, and permission lists security for item types.

In order to set up the security for the items listed above, complete the Security Options page. The Security Options page is where you select the type of security for set IDs, business units, item types, and so on. The type of security that you select for each item on the Security Options page determines which of the other pages in this section you must complete. You can secure each item—business unit, item type, and so on—by user ID or permission list.

If you select user ID security for an item on the Security Options page, complete the appropriate page in the Design Student Administration, Secure Student Financials, User ID menu.

If you select permission list security for an item on the Security Options page, complete the appropriate page in the Design Student Administration, Secure Student Financials, Perm List menu.

If you select *No Security* for an item on the Security Options page, do not complete any other page for that item because you have selected to not secure the item. All permission lists and user IDs can access all items when you select *No Security*.

When you set security, you are giving either a user ID or a permission list access to the items that you list on the page. If you do not list the item on the page, the user ID or permission list will not have access to the item.

In the following sections, you can set security for each item using a user ID page or a permission list page. Complete only one of these pages, depending on the type of security that you selected on the Security Options page for that item.

Note. PeopleSoft Student Financials security works in conjunction with any other security settings you want to have in your system.

See Also

PeopleSoft 8 PeopleTools PeopleBook: Security, "User Profiles"

PeopleSoft 8 PeopleTools PeopleBook: Security, "Working with Permission Lists"

Setting Security Views

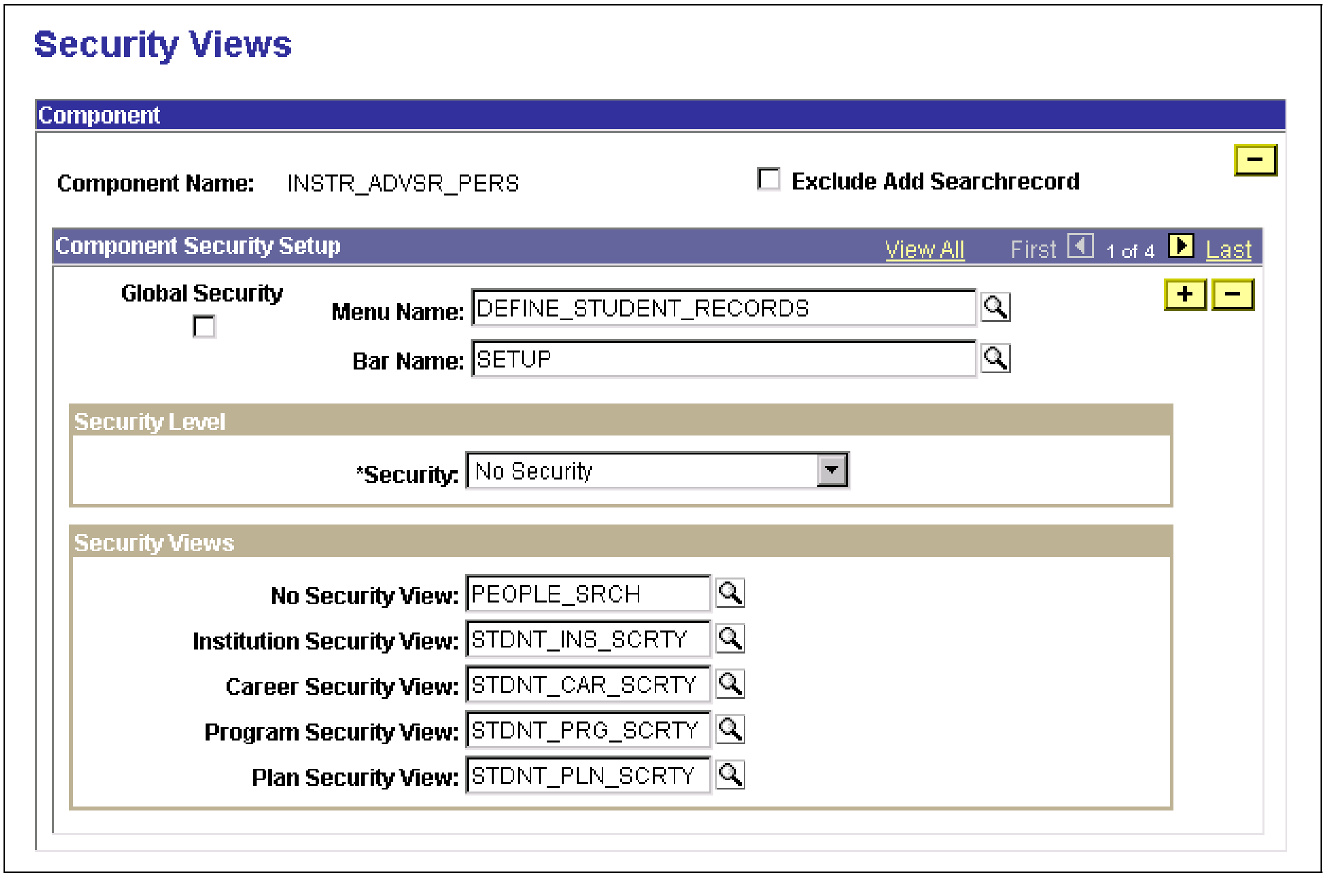
Before completing your security setup you should reveiw the delivered security views. You can also add modified security views to your sytem

Page Used to Set Security Views

Page Name	Object Name	Navigation	Usage
Security Views	SECURITY_VIEWS	Design Student Administration, Secure Student Financials, Setup, Security Views, Security Views	Review the security views delivered with your system. You can also add any modified security views for your system.

Reviewing Security Views

Access the Security Views page.



Security Views page

Search Text	Common identifier that relates to the view.
No Security View	The view that runs when no security is set.
Permission List Security View	The view that runs when security is set to permission list.
User ID Security Views	The view that runs when security is set to user ID.
Secured Field Type	When a prompt is on the field, one of the views runs depending on how security is set.

View Extensions

View names have one of three extensions:

- _NONVW indicates that no security is chosen for that view.
- _OPRVW indicates the user ID security chosen for that view.
- _CLSVW indicates the permission list security chosen for that view.

Setting Security Options

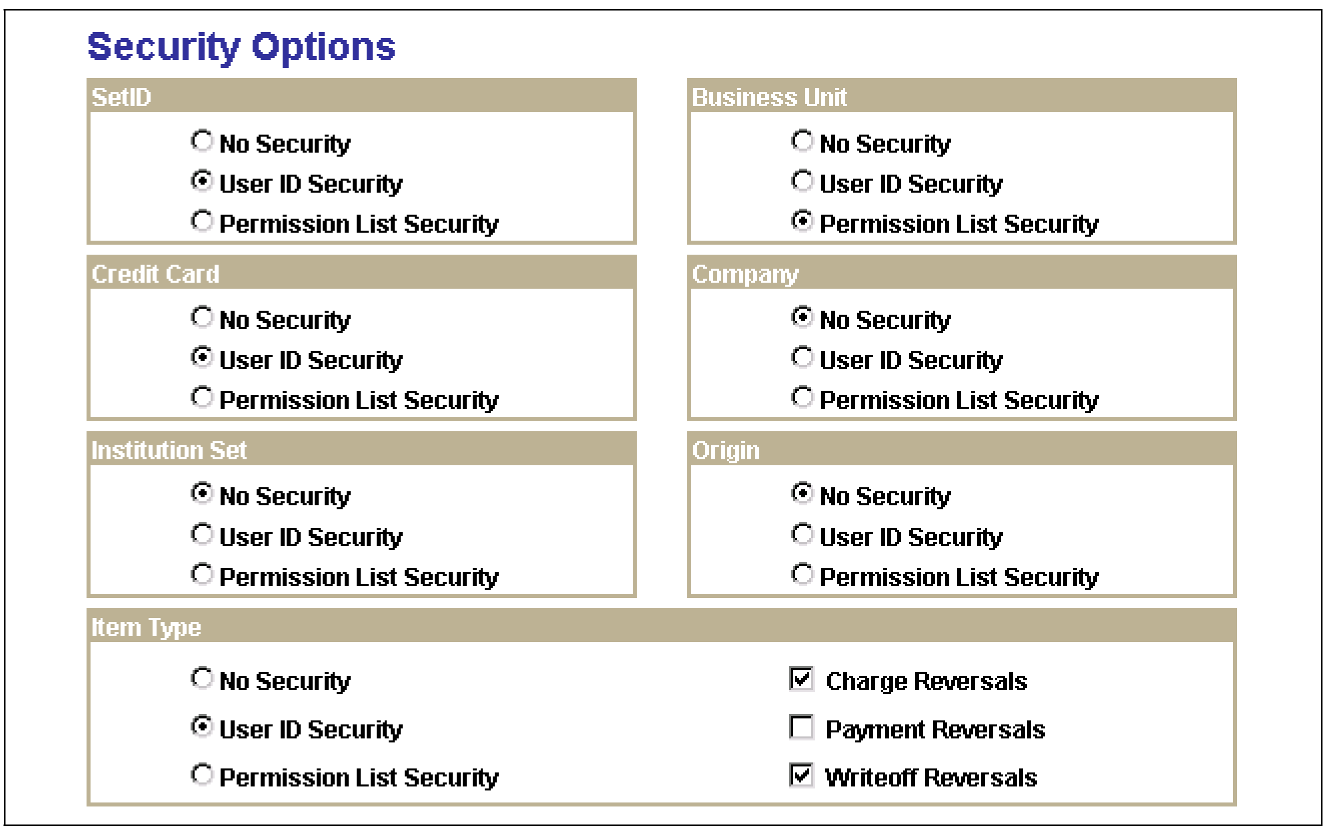
You can elect to have no security, user ID security, or permission list secruity for setID, business unit, credit card, company, institution set, origin, and item type in PeopleSoft Student Financials. After you make your selections on the Security Options page, you then use other pages to enter user IDs or permission lists to secure the seleted items, such as business unit and institution set.

Page Used to Set Security Options

Page Name	Object Name	Navigation	Usage
Security Options	SCRTY_OPTIONS_SF	Design Student Administration, Secure Student Financials, Setup, Security Options, Security Options	Select the security options that you plan to implement and the key fields that you want to secure in PeopleSoft Student Financials. **Note.** This page is not keyed by setID or business unit. The system implements the options you select here system-wide.

Selecting Security Options

Access the Security Options page.



Security Options page

SetID, Business Unit, Credit Card, Company, Institution Set, Origin

For each area, select the security option that you want:

Note. If you select No Security for Credit Card, all users can see the entire credit card number. If you select User ID Security or Permission List Security, only the users to whom you grant access can see the whole credit card number.

No Security Disables PeopleSoft application security. All users authorized to access a page can select any valid setID, business unit, credit card, company, institution set, origin, or item type. PeopleSoft applications are delivered with security disabled.

When you select this option, the system does not look at any of your security setup described in the following sections. So, even if you have entered information on the pages in the following sections, the security is *not* implemented if you select the No Security option here.

User ID Security Enables PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by user ID. This chapter also discusses how to set up security for a user ID.

Permission List Security Enables PeopleSoft application security. Users are limited to the setID, business unit, credit card, company, institution set, origin, or item type specified by a permission list. This means that all users in the permission list have the same security. This chapter also discusses how to set up security for permission lists.

Item Type

The following check boxes are available only if you select the User ID Security or Permission List Security options in this same group box.

Charge Reversals Restricts the user to reverse only those item types that you defined as charge item types.

Payment Reversals Restricts the user to reverse only those item types that you defined as payment item types.

Writeoff Reversals Restricts the user to reverse only those item types that you defined as writeoff item types.

Updating PeopleSoft Student Financials Security Settings

PeopleSoft delivers the Security Options page with no security set for each item on the page. The SF Load Security Views process (SFRSCVW) that you run from this page updates your system security with the selections on the Security Options page. You also must run this process if you change any of the other pages used for PeopleSoft Student Financials security (for example, when you change information on the Perm List - Business Unit page). You do not need to run this process when you change credit card security options.

This section discusses how to update security for PeopleSoft Student Financials.

Page Used to Update PeopleSoft Student Financials Security Settings

Page Name	Object Name	Navigation	Usage
Set Security	RUNCTL_SFSCRTY	Design Student Administration, Secure Student Financials, Process, Set Security, Set Security	Run the SF Load Security Views process to update secruity changes and generate a security report.

Updating Security for PeopleSoft Student Financials

Access the Set Security page.

Business Unit Select the business unit for which you want to update security. If you have multiple business units for which you must update security, run the process separately for each business unit.

Generate Report Select to update security *and* generate a report. If you do not select this check box, the system only updates security.

Run Click to run the SF Load Security Views process (SFRSCVW). When you run the process, the system also generates a report called SF Load Security Views

Setting Security for SetIDs

Depending on the security option that you selected for set IDs on the Security Options page, you should grant access to a setID (TableSet) using permission lists *or* user IDs. If you selected no security for set IDs on the Security Options page, do not complete the pages listed in this section because all user IDs and permission lists have access to all set IDs.

Pages Used to Set Security for SetIDs

Page Name	Object Name	Navigation	Usage
Perm List - Set ID (permission list — setID)	SEC_SETID_CLS	Design Student Administration, Secure Student Financials, Perm List, SetID, SetID	Grant a selected permission list access to specific set IDs.
User ID - SetID	SEC_SETID_OPR	Design Student Administration, Secure Student Financials, User ID, SetID, SetID	Grant a selected user ID access to specific set IDs.

Setting Security for Business Units and Cashier Offices

The pages in this section enable you to grant security access to business units and cashier offices within business units. If your institution does not use the cashiering feature, you do not need to set up cashier security, but you can set up business unit security.

Depending on the security option that you selected for business units on the Security Options page, you should grant access to a business unit and cashier offices using permission lists *or* user IDs. If you selected no security for business units on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all business units.

This section lists prerequisites and discusses how to:

- Grant a permission list access to business units and cashier offices.
- Grant a user ID access to business units and cashier offices.

Prerequisites

Before you set security for business units and cashier offices, you must:

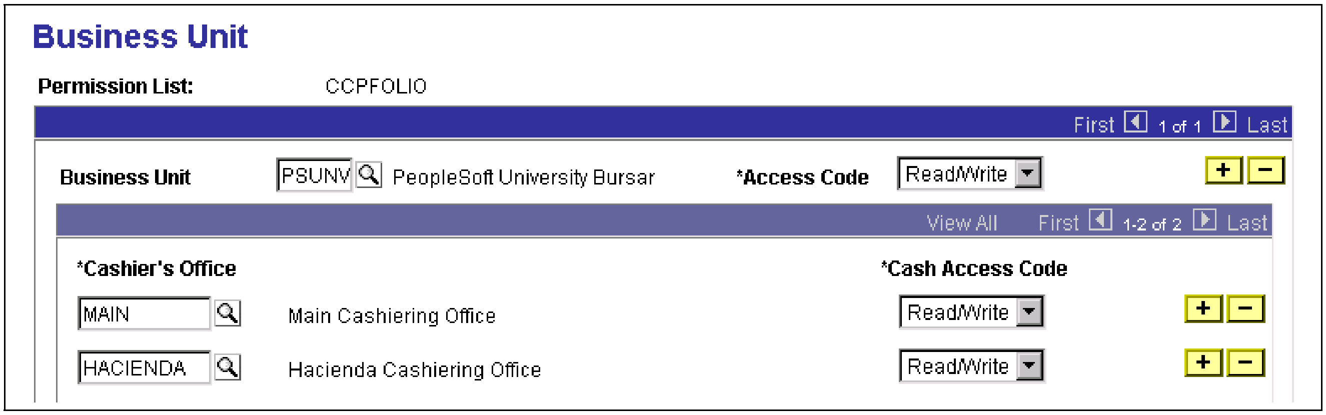
- Set up business units.
- Set up cashier offices.

Pages Used to Set Security for Business Units and Cashier Offices

Page Name	Object Name	Navigation	Usage
Perm List - Business Unit (permission list — business unit)	SEC_UNITSF_CLS	Design Student Administration, Secure Student Financials, Perm List, Business Unit, Business Unit Permission List	Grant a permission list access to business units. Within a business unit, you can also grant permission to specific cashier offices.
User ID - Business Unit	SEC_UNITSF_OPR	Design Student Administration, Secure Student Financials, User ID, Business Unit, Business Unit	Grant a user ID access to business units. Within a business unit, you can also grant permission to specific cashier offices.

Granting Permisison List Access to Business Units and Cashier Offices

Access the Perm List - Business Unit page.



Perm List – Business Unit page

Select the business unit that you want this permission list to access.

If you want to grant the permission list access to cashier offices, select a cashier office, within the business unit, that you want this permission list to access.

If you do not want to grant access to a business unit or cashier office, do not include the business unit or cashier office on this page.

Granting User ID Access to Business Units and Cashier Offices

Access the User ID – Business Unit page.

For explanations of the field on this page, refer to the Perm List – Business Unit page.

Setting Security for Item Types

Depending on the security option that you selected for item type on the Security Options page, you should grant access to item types using permission lists *or* user IDs. If you selected no security for item types on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all item types.

This section lists prerequisites and discusses how to:

- Set item type security by permission list.
- View item type security by permission list.
- Set item type security by user ID.
- View item typesecurity by user ID.

Prerequisites

Before you can set security for item types, you must:

- Grant permission lists access to business units on the Perm List - Business Unit page, if you are securing item types by permission list.

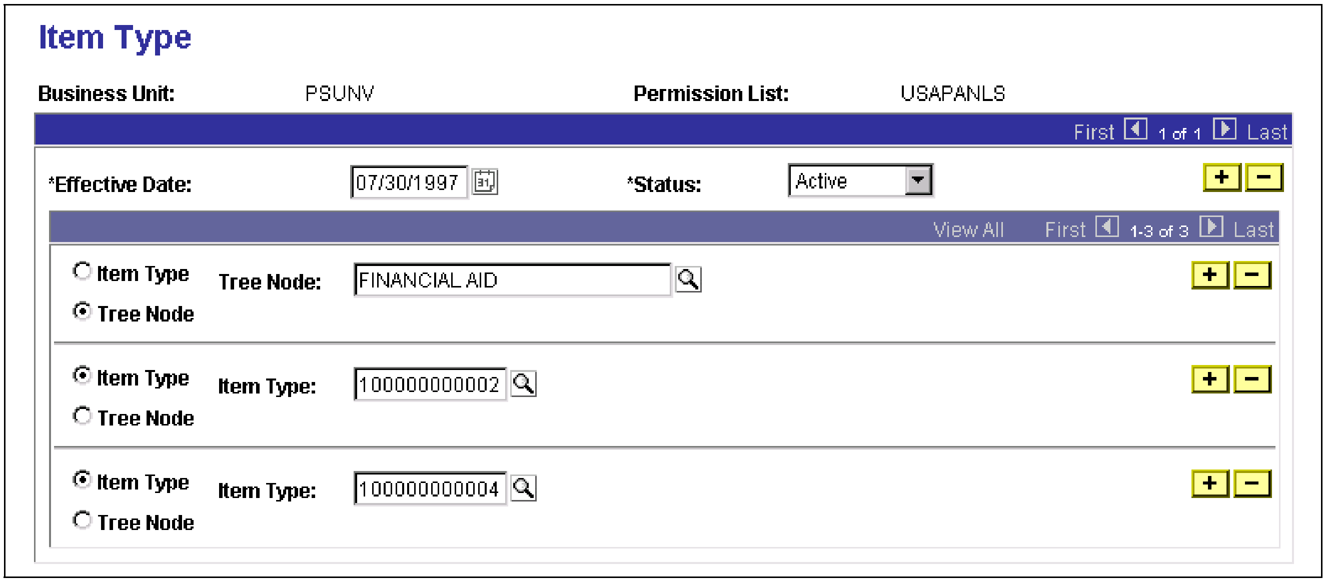
- Grant user IDs access to business units on the User ID - Business Unit page, if you are securing item types by user ID.
- Set up your item type tree in PeopleSoft Student Financials.

Pages Used to Set Security for Item Types

Page Name	Object Name	Navigation	Usage
Perm List - Item Type (permission list — item type)	SEC_ITEM_CLS	Design Student Administration, Secure Student Financials, Perm List, Item Type, Item Type	Set item type security for a permission list, within a business unit.
Perm List - View Item Type Security (permission list-view item type secruity)	SCRTY_ITEM_TYP_CLS	Design Student Administration, Secure Student Financials, Perm List, View Item Type Security, View Item Type Security	View item type security by permission list. To view data on this page, you must set up item type security on the Perm Lists - Item Type page and have item type security set to permission list security on the Security Options page.
User ID - Item Type	SEC_ITEM_OPR	Design Student Administration, Secure Student Financials, User ID, Item Type, Item Type	Set item type secruity for a user ID, within a business unit.
User ID - View Item Type Security	SCRTY_ITEM_TYPE	Design Student Administration, Secure Student Financials, User ID, View Item Type Security, View Item Type Security	View item type security by user ID. To view data on this page, you must set up item type security on the User ID - Item Type page and have item type security set to user ID security on the Security Options page.

Setting Item Type Security by Permission List

Access the Perm List - Item Type page.



Perm List - Item Type page

Item Type Select to grant access to a specific item type. Once you select this option, you can select an item type from the available options.

Tree Node Select to grant access to all item types within a specific node on the Item Type Tree. If you select a tree node, users have access to all items types defined within that node.

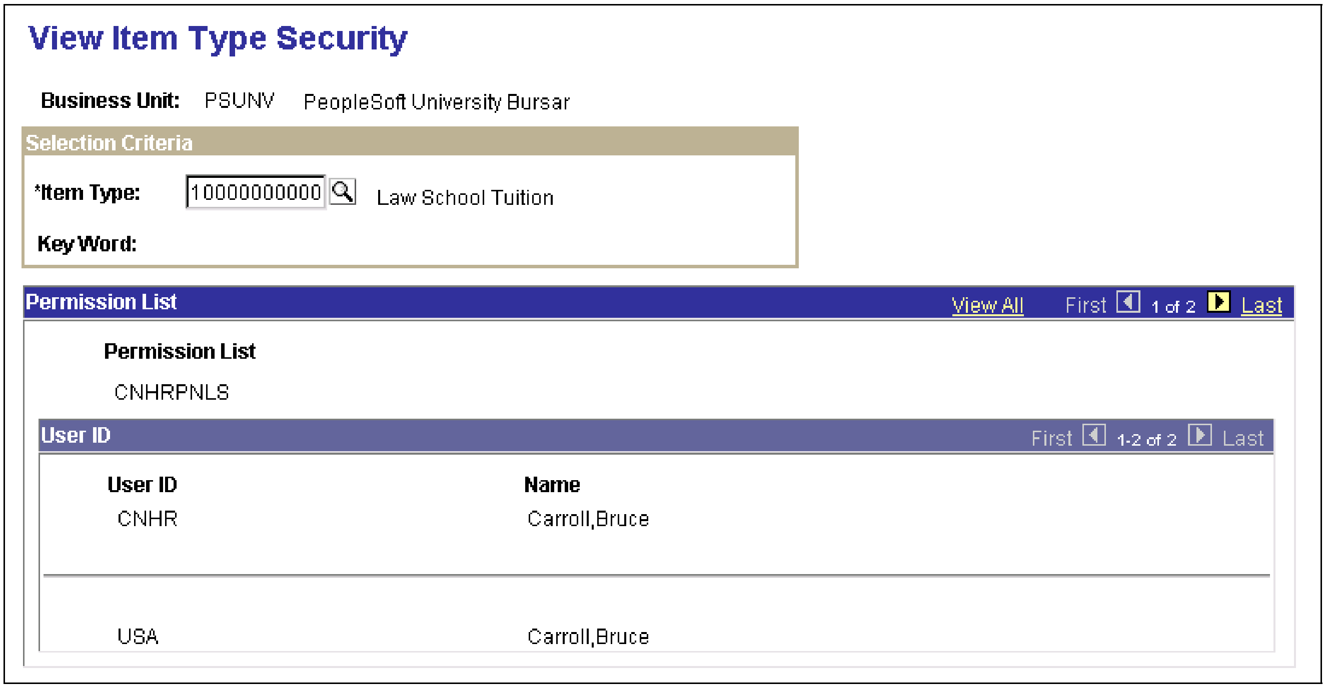
Once you select this option, you can select a tree node from the available options.

You can select any combination of tree node and item types for the permission list to access. If you select a tree node, you do not need to separately list item types that fall under that tree node.

Note. If you select a tree node of *ALL*—which generally includes the whole tree—select No Security for item types on the Security Options page. Granting access to the whole item type tree is like not having security at all.

Viewing Item Type Security by Permission List

Access the View Item Type Security page.



Perm List - View Item Type Security page

Item Type	Enter the item type for which you want to review permission list access. Once you select an item type, information appears in the Permission List and User ID sections.
Key Word	If a keyword is associated with the item type, one appears.
Permission List	The name of the permission list that has access to the item type selected.

Setting Item Type Security by User ID

Access the User ID-Item Type page.

You can set access either by defining specific item types or by defining a node on the Item Type Tree. If you select a tree node, the user ID can access all item types on that node of the tree.

See Also

Chapter 16, “Securing Student Financials,” Setting Item Type Security by Permission List, page 233

Viewing Item Type Security by User ID

Access the User ID-View Item Type Security page.

See Also

Chapter 16, “Securing Student Financials,” Viewing Item Type Security by Permission List, page 234

Setting Security for Institution Sets

Depending on the security option that you selected for institution sets on the Security Options page, grant access to an institution set using permission lists *or* user IDs. If you selected no security for institution sets on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all institution sets.

This section lists prerequisites.

Prerequisites

Set up your institution sets.

Pages Used to Set Security for Institution Sets

Page Name	Object Name	Navigation	Usage
Perm List - Institution Set (permission list — institution set)	SEC_ISET_CLS	Design Student Administration, Secure Student Financials, Perm List, Institution Set, Institution Set	Grant permission lists access to specific institution sets.
User ID - Institution Set	SEC_ISET_OPR	Design Student Administration, Secure Student Financials, User ID, Institution Set, Institution Set	Grant user IDs access to specific institution sets.

Overriding the Self-Service Institution Set

The User Profiles Management feature assigns institution sets to user IDs. You use the Self Service Instition Set Override page to change the instituion set assigned by the User Profiles Management feature. By overriding the institution set on this page, instead of on the User Defaults 2 page, you get a history of your changes.

This section lists prerequisites and discusses how to override the self-service institution set.

Prerequisites

You must first set up institution sets and then assign a user ID to an institution set. A user ID must be assigned an institution set by the User Profiles Management process in order to have an institution set appear in the Calculated Value field on the Self Service Institution Set Override page.

See Also

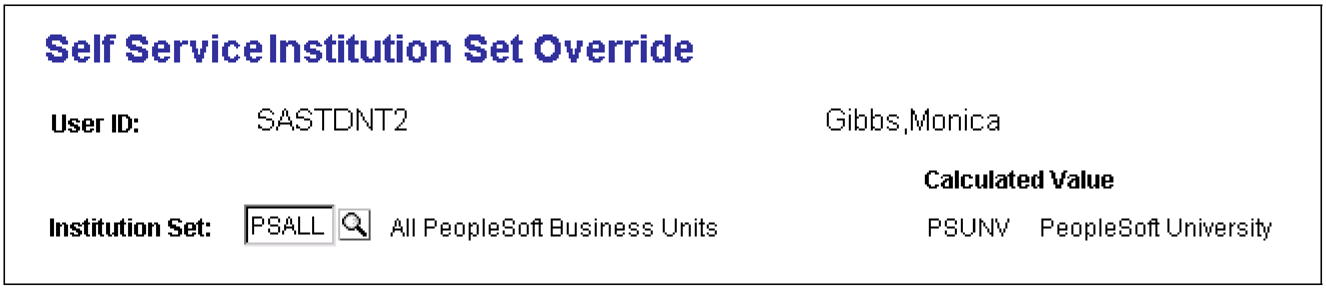
Chapter 17, “Creating and Maintaining User Profiles,” page 241

Page Used to Override the Self-Service Institution Set

Page Name	Object Name	Navigation	Usage
Self Service Institution Set Override	ISET_OPR	Design Student Administration, Secure Student Financials, User ID, Student Institution Set, Institution Set Override	Override the value for an institution set that has been assigned to the user ID by the User Profiles Management feature.

Overriding the Self-Service Institution Set

Access the Self Service Institution Set Override page.



Self Service Institution Set Override page

Institution Set

Select an institution set to make this value the default for this user ID in the user profile.

Calculated Value

The calculated value is the institution set value assigned to the user ID by the User Profiles Management feature. If you do not use the User Profiles Management feature, there is no value in this field.

The calculated value is the same as the Institution Set field on the User Defaults 2 page.

See Also

Chapter 20, "Setting User Defaults," page 271

Setting Security for Companies

Depending on the security option that you selected for companies on the Security Options page, you should grant access to companies using permission lists *or* user IDs. If you selected no security for companies on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all companies.

Companies are used in PeopleSoft Human Resources for payroll and pay groups. An employee's company is usually designated as the company that pays the employee's salary. You must set up company security so that you can access certain values when setting up PeopleSoft Student Financials.

This section lists prerequisites.

Prerequisites

You must first set up your company codes and permission lists.

Pages Used to Set Security for Companies

Page Name	Object Name	Navigation	Usage
Perm List - Company (permission list — company)	SEC_COMPANY_CLS	Design Student Administration, Secure Student Financials, Perm List, Company, Company	Grant a permission list access to the transactions for a particular company or companies.
User ID - Company	SEC_COMPANY_OPR	Design Student Administration, Secure Student Financials, User ID, Company, Company	Grant a user ID access to the transactions for a particular company or companies.

Setting Security for Origin IDs

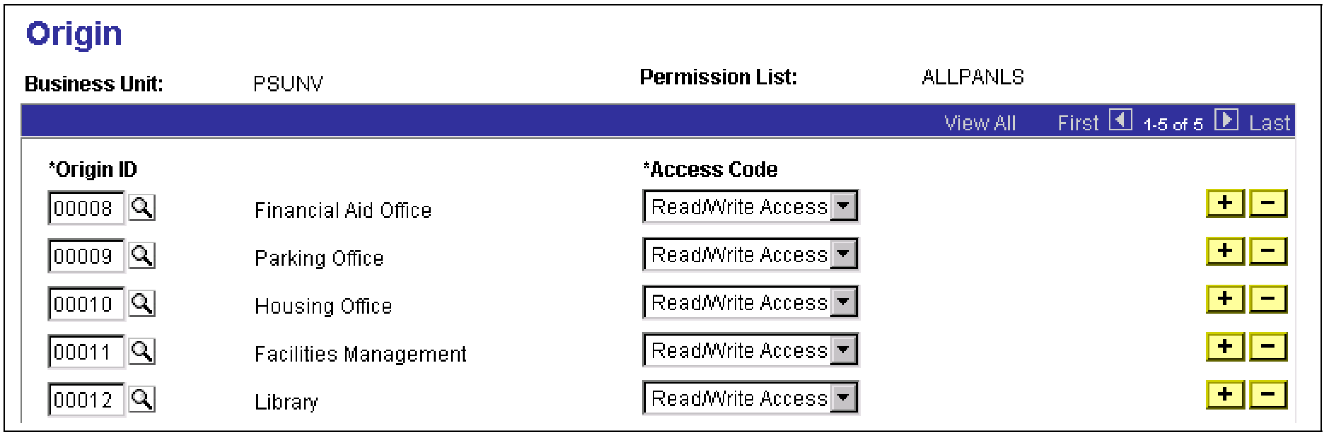
Depending on the security option that you selected for origin on the Security Options page, grant access to an origin ID using permission lists *or* user IDs. If you selected no security for origin IDs on the Security Options page, you do not need to complete the pages listed in this section because all user IDs and permission lists have access to all origin IDs.

Pages Used to Set Security for Origin IDs

Page Name	Object Name	Navigation	Usage
Perm List - Origin (permission list — origin)	SEC_ORIGIN_CLS	Design Student Administration, Secure Student Financials, Perm List, Origin, Origin	Grant origin ID access by permission list. You must first grant permission lists access to business units on the Perm List - Business Unit page.
User ID - Origin	SEC_ORIGIN_OPR	Design Student Administration, Secure Student Financials, User ID, Origin, Origin	Grant origin ID access by user ID. You must first grant user IDs access to business units on the Use ID - Business Unit page.

Granting Origin ID Access by Permission List

Access the Perm List − Origin page.



Perm List - Origin page

Select the origin ID that you want this permission list to access. If you do not want to grant access to an origin ID, do not include the origin ID on this page.

Granting Origin ID Access by User ID

Access the User ID − Origin page.

See Also

Chapter 16, "Securing Student Financials," Granting Origin ID Access by Permission List, page 238

Setting Security for Credit Cards

Depending on the security option that you selected for credit cards on the Security Options page, grant access for viewing credit card numbers using permission lists *or* user IDs. If you selected no security for credit cards on the Security Options page, you do not need to complete the pages listed in this section.

Warning! If you selected no security for credit cards on the Security Options page, all users can view the entire credit card number.

When you assign credit card security on the two pages listed in this section, you are granting the user ID or permission list access to view the entire credit card number. This security should probably be granted to only a few people in your institution. User IDsand permission lists to which you do not grant credit card security access can view only the last four digits of the credit card number.

Pages Used to Set Security for Credit Cards

Page Name	Object Name	Navigation	Usage
Perm List - Credit Card (permission list — credit card)	SEC_CC_CLS	Design Student Administration, Secure Student Financials, Perm List, Credit Card, Credit Card	Grant a permission list the ability to view the entire credit card number. You must first set up permission lists.
User ID - Credit Card	SEC_CC_OPR	Design Student Administration, Secure Student Financials, User ID, Credit Card, Credit Card	Grant a user ID the ability to view credit card information. You must first set up user IDs.

CHAPTER 17

Creating and Maintaining User Profiles

This chapter provides an overview of user profiles security and discusses how to:

- Prepare for user profiles management.
- Set up user profiles management.
- Run the user profiles management processes.
- Generate password notification letters.
- Resolve issues for the user profiles management processes.

Understanding User Profiles Security

In order to give self-service access to an individual, you need to create a user profile in the PeopleTools, Maintain Security, Use, User Profiles menu. You then add a password and all the security this individual needs to have access to your site. The User Profiles Management feature helps you create and maintain your user profiles in batch. You must understand how a user profile is created before you set up the User Profiles Management feature.

Warning! Before you use this process, make sure you read and understand how PeopleTools security works. You are about to give database access to a large number of people, and you cannot go back, unless you do it manually. A user with a high level of security clearance in your institution should be in charge of running and setting up this process. Very few people should have access to the User Profiles Management setup and process pages.

The User Profiles Management feature consists of four main processes. These processes enable you to:

- Create new user profiles and add a role for the user ID.
- Delete a role from the user profile.
- Add a role to the user profile for an already existing user ID.
- Assign user preferences (default values) for the user ID, including security values needed for the online credit card process.

You can process these four actions individually or all at once. The User Profiles Management feature runs the four processes one role at a time. The mass change selects a group of people, applicants for example, and then runs the processes based on the Applicant role. Each of these processes uses temp tables so you can validate what the processes did. These temporary tables are useful if you run the process for many roles at once. There is a clean up page to delete these temporary tables.

The User Profiles Management feature enables you to create user profiles and assign user IDs and passwords to groups of individuals. You can select which algorithms to use for creating the user ID and password and assign a checklist, a communication, or a comment to the newly created user ID. The communication can include a letter that informs the new users of their user ID and password for access to the web.

The User Profiles Management feature also enables you to maintain existing user profiles by adding or deleting roles to grant or remove page access. It can also set up the user preferences, which are default values, for basic fields like Academic Career and Academic Institution. If your institution is accepting credit cards, you can use the feature to give appropriate security access for the online credit card functionality. The system uses mass changes to select the population of individuals for whom you want to create or maintain user profiles.

Note. The New User Registration feature uses essentially the same process as the User Profiles Management feature, except that the New User Registration feature only works on one ID at a time.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Using PeopleSoft Community Access Collaborative Application,” Understanding Self-Service New User Registration

PeopleTools: Security

Supplemental Installation Instructions for PeopleSoft 8 Student Administration and Contributor Relations Applications: Using the User Profiles Management Result Table

Technical Notes

PeopleSoft delivers several mass changes to be used with this process. PeopleSoft also delivers corresponding queries to be used with the Dynamic Role Member Assignment process (DYNROLE_PUBL application engine) that is provided by PeopleTools. The queries provided have the same criteria as the mass changes.

The following mass changes are delivered:

- Userprofile - Advisor
- Userprofile - Applicant
- Userprofile - Contributor
- Userprofile - Employee
- Userprofile - Former Student
- Userprofile - Fundraiser
- Userprofile - Graduate
- Userprofile - Instructor
- Userprofile - Prospect
- Userprofile - Recruiter
- Userprofile - Student

The following queries are delivered:

- Userid_ Advisor

- Userid_ Applicant
- Userid_ Contributor
- Userid_ Employee
- Userid_ Former Student
- Userid_ Fundraiser
- Userid_ Graduate
- Userid_ Instructor
- Userid_ Prospect
- Userid_ Recruiter
- Userid_ Student

Note. If you create your own mass changes, be sure to create corresponding queries if you will be using the Dynamic Role Member Assignment process to assign roles to already existing user IDs. PeopleSoft recommends that you only use the User Profiles Management feature to maintain your user profiles.

Sample Data

In the sample database, there are roles created for each of the mass changes delivered. These roles give access to the SA Personal Portfolio pages using the permission list CCPFOLIO. The roles provided are:

- SA - Advisor
- SA - Applicant
- SA - Contributor
- SA - Employee
- SA - Former Student
- SA - Fundraiser
- SA - Graduate
- SA - Instructor
- SA - Prospect
- SA - Recruiter
- SA - Student

Note. You can only see these roles in the sample database. You must create your own roles and permission lists based on your needs for your database.

Preparing for User Profiles Management

Prior to using the User Profiles Management feature you must complete the setup described in this section. You should complete the setup in the order shown.

Warning! Make sure you read about and understand PeopleSoft security before you attempt to use the User Profiles Management feature.

This section provides an overview of the creation of the model user ID and discusses how to:

1. Create the model user ID.
2. Enter the model user ID description.
3. Set up the roles.
4. Set up permission lists.
5. Set up primary permission lists.
6. Set up Mass Changes.
7. Set up event IDs for the 3C engine.
8. Set up communications.
9. Set up checklists.
10. Set up comments.

See Also

PeopleTools Security PeopleBook

Understanding the Creation of the Model User ID

The User Profiles Management feature creates user profiles based on a user ID that serves as a model. You create user IDs or user profiles in the User Profiles component (PeopleTools, Maintain Security, Use, User Profiles).

PeopleSoft suggests that you name your model user ID *SAMODEL* for the Student Administration Model. You only need to complete the first two pages in the User Profiles component. The other pages included in this component do not contain any fields that the User Profiles Management feature uses.

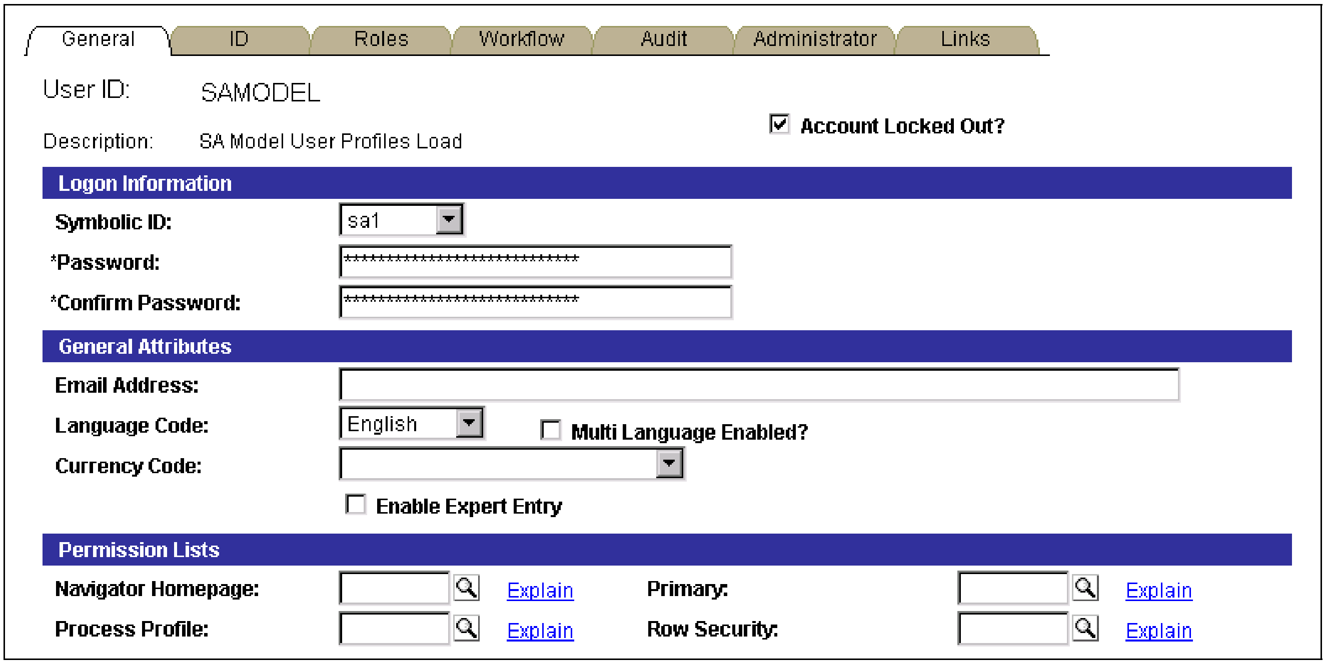
Pages Used to Set Up the Model User ID

Page Name	Object Name	Navigation	Usage
User Profiles - General	USER_GENERAL	PeopleSoft, Maintain Security, Use, User Profiles, General	Create a user ID that the User Profiles Management feature can use as a clone (model) when creating user profiles.
User Profiles - ID	PSOPRALIAS	PeopleSoft, Maintain Security, Use, User Profiles, ID	Enter the ID type and description for the model user ID that the User Profiles Management feature will use when creating user profiles.

Creating the Model User ID

Access the User Profiles − General page.

Add a new value to create a user ID called SAMODEL (Student Administration Model).



User Profiles - General page

Symbolic ID

This field is cloned when the user IDs are created using the User Profiles Management feature.

Giving a Symbolic ID allows your self-service users to perform different transactions using Remote Call Cobol features such as transfer credit and run degree progress report.

Selecting a Symbolic ID here gives the self-service users 2-tier access to your database. They will be able to log on to your database, but they will NOT be able to perform more transactions or view more pages than what they can do or see on the web. The same security setting will apply.

PeopleSoft strongly recommends that you always select a Symbolic ID, regardless of the role for which you are running the process. For example, if you are running the process using the role of Prospects and you think they do not need a Symbolic ID, remember, when your prospects become applicants or students, they will need a Symbolic ID. There is no batch process to create one.

Password and **Confirm Password**

These fields are required on this page, but the password will NOT get cloned when you create your new user IDs.

Email Address

Do not enter anything is this field.

Language Code

Select the language for the model user ID. This field is cloned when the user IDs are created using the User Profiles Management feature.

Multi Language Enabled?

Select this check box if the user is going to access PeopleSoft in a variety of languages. This field is cloned when the user IDs are created using the User Profiles Management feature.

Currency Code and **Enable Expert Entry** — Leave these blank. The User Profiles Management feature does not use them.

Navigator Homepage — Enter a homepage navigation path if you want to have this value cloned. This field is optional.

Process Profile — Enter a process profile if you want to have this value cloned. This field is optional .

Primary — In order to give your self-service users access to the Country field and the Currency field when an amount of money is required, you must enter a permission list in this field. PeopleSoft strongly recommends that you enter a value in this field.

Row Security — Enter a value if you want to have this value cloned. This field is optional.

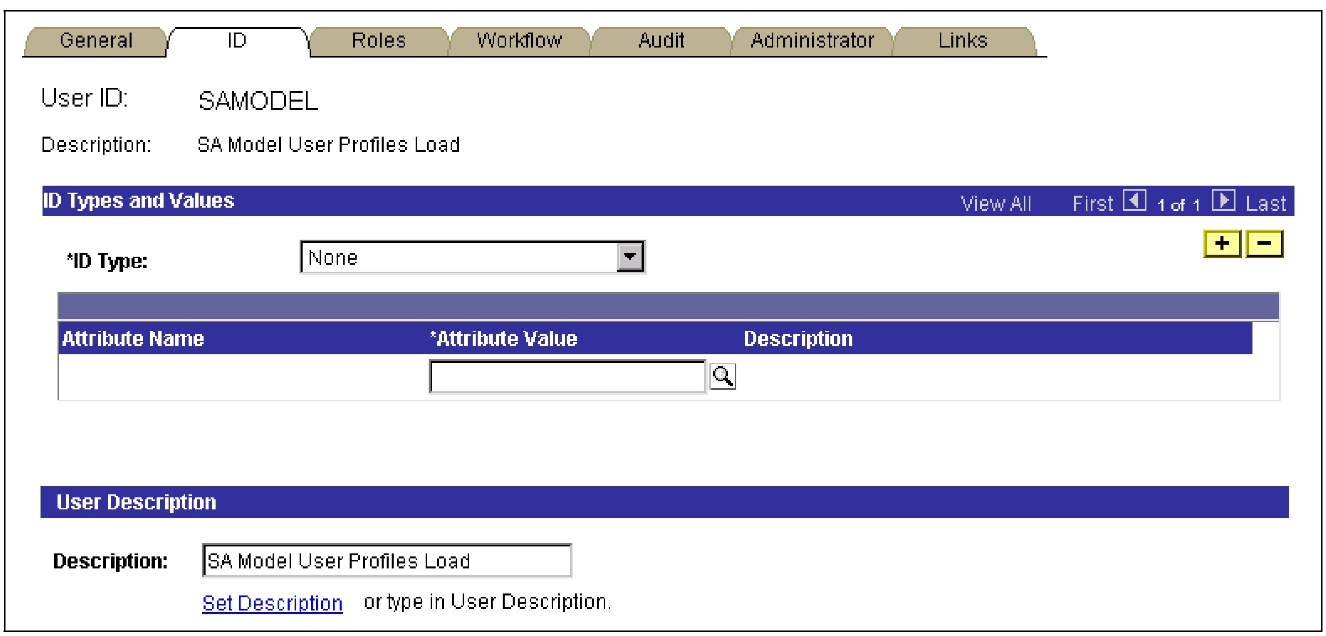
Note. The Account Locked Out functionality is not cloned for the user profiles created in batch. In other words, when the user profiles are created, they are ready for the self-service users to access your site.

See Also

Chapter 17, “Creating and Maintaining User Profiles,” Setting Up the Primary Permission Lists, page 247

Entering the Model User ID Description

Access the User Profiles – ID page.



User Profiles - ID page

ID Type — Select *None.* This value is not cloned by the User Profiles Management feature. The ID type to use for the user profiles that you create is set up on the User Profiles Mass Creation setup page.

Attribute Value — The process automatically adds a value for each specific user profile you create.

Description	Enter the name you want for your model user ID.

Note. You do not need to enter any other fields than the ones described when you create the model user ID to be used by the User Profiles Management feature. None of the fields on this page get cloned.

Setting Up the Roles

You must define the roles that you want the User Profiles Management process to assign to your self-service users. For example, you might want to have roles for applicant, student, prospect, instructor, recruiter, and so on.

There are a few mass changes corresponding to specific roles that are delivered with your system. You might want to consider the names PeopleSoft has given to these mass changes when creating your roles. A list of the delivered mass changes to use with this process is available in the section below.

See Also

Chapter 17, “Creating and Maintaining User Profiles,” Setting Up Mass Changes, page 247

Setting Up Permission Lists

You must set up a permission list in order to give your self-service users access to pages. PeopleSoft recommends that you give your self-service users access to the Person Portfolio pages at least. You set up permission lists in the Permission Lists component (PeopleTools, Maintain Security, Use, Permission Lists).

Setting Up the Primary Permission Lists

The Primary Permission List is used when you create the model user ID. To create a Primary Permission List you must create a Permission List first. Go to PeopleTools, Maintain Security, Use, Permission Lists and add a new value that starts with the letters *PP*. There is PeopleCode in the system that looks for permission lists starting with *PP*. Add a description for the permission list. There is no need to set up anything else.

Go to Define Business Rules, Define General Options, Setup, Primary PrmList Preferences and select the Permission List you just created. Notice that only permission lists starting with *PP* are shown in the search prompt. Users need to have a primary permission list defined in order to have access to functionality that uses County and Currency codes.

See Also

Chapter 5, “Reviewing Your Installation Setup and System Defaults,” Setting Up Primary Permission List Preferences, page 66

Setting Up Mass Changes

For each role that you create, you must create a corresponding mass change. PeopleSoft delivers several mass changes to help you create your own. The delivered mass changes are the following:

- Userprofile - Advisor
- Userprofile - Applicant
- Userprofile - Contributor
- Userprofile - Employee

- Userprofile - Former Student
- Userprofile - Fundraiser
- Userprofile - Graduate
- Userprofile - Instructor
- Userprofile - Prospect
- Userprofile - Recruiter
- Userprofile - Student

See Also

PeopleTools Data Management PeopleBook, "Mass Change."

Setting Up Event IDs for 3C Engine

If you want to assign a communication, checklist and/or comment to the new user IDs that you create using the User Profiles Management feature, you must set up an event ID.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Setting Up Events"

Setting Up Communications

If you want to send a letter to notify the new users of their user IDs and passwords, you need to set up a communication. Make sure the letter code you create in the Standard Letter table has a:

- Function equal to *Gen* (general).
- SQC Name equal to *CCLTRWOL.*

Without having this specific SQC name, letter generation will not extract the user IDs and the passwords to print on the letters. To help you print the letters with the user IDs and passwords, you can use the pre-delivered template called CCLTROPR.doc. To use this template, create a letter code called OPR. You must also create a communication speed key (Comm Key) and an Event ID.

Warning! You should not modify the SQC named CCLTRWOL.sqr in any way.

The User Profiles Management process gives you the flexibility to assign more than one communication. For example, if you are creating user profiles for your prospects for next term, you can create an Event ID with different Comm Keys. One can include a letter code to communicate their user ID and their password, a second one could be a post card for an invitation to an open house, and a third one for an admission package.

Note. The User Profiles Management process assigns communications only to the individuals who have a user profile created by the process.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Communications"

Chapter 17, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 258

Setting Up Checklist

If you want to assign a checklist code to the new self-service users, you must create checklist items, a checklist code, and add it to the Event ID. A checklist could be used for the users to do list.

Note. The User Profiles Management process assigns checklists only to the individuals who have a user profile created by the process.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Communications”

Setting Up Comments

You might want to assign a comment to the new self-service users. For example, you might want to know that an individual ID has had a user profile created through the User Profiles Management process. You could create a comment such as, “This individual has had a user ID created through the User Profiles Management process.” To do this, you need to create a comment category and add it to the Event ID.

Note. The User Profiles Management process assigns comments only to the individuals who have a user profile created by the process.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Comments”

Setting Up User Profiles Management

The User Profiles Mass Creation component is the setup component for User Profiles Management. When you enter the component, select a role name. That role is added to user profiles or deleted from existing user profiles, depending on the processes you select when you run USERPROFILE.

On the first page of the component, select the mass change that you want to use to select the group of individuals from whom you want to add or delete the role you selected from their new or existing user profiles. You can then review the list of these individuals whose user profiles you are about to create or modify. The individuals are listed in a search results grid on the bottom of the page after you run the mass change. The list gives a count of the number of IDs selected. On the first page, you also determine how the user ID and passwords are created. You can also assign 3C items (Communications, Checklists, and/or Comments) and create a result table, which is a temp table that holds the user IDs newly created with their nonencrypted passwords.

The second page of the component is where you select which user preferences (default values) to assign to the user IDs. It is also where you set your IDs to use the online credit card functionality.

This section discusses how to:

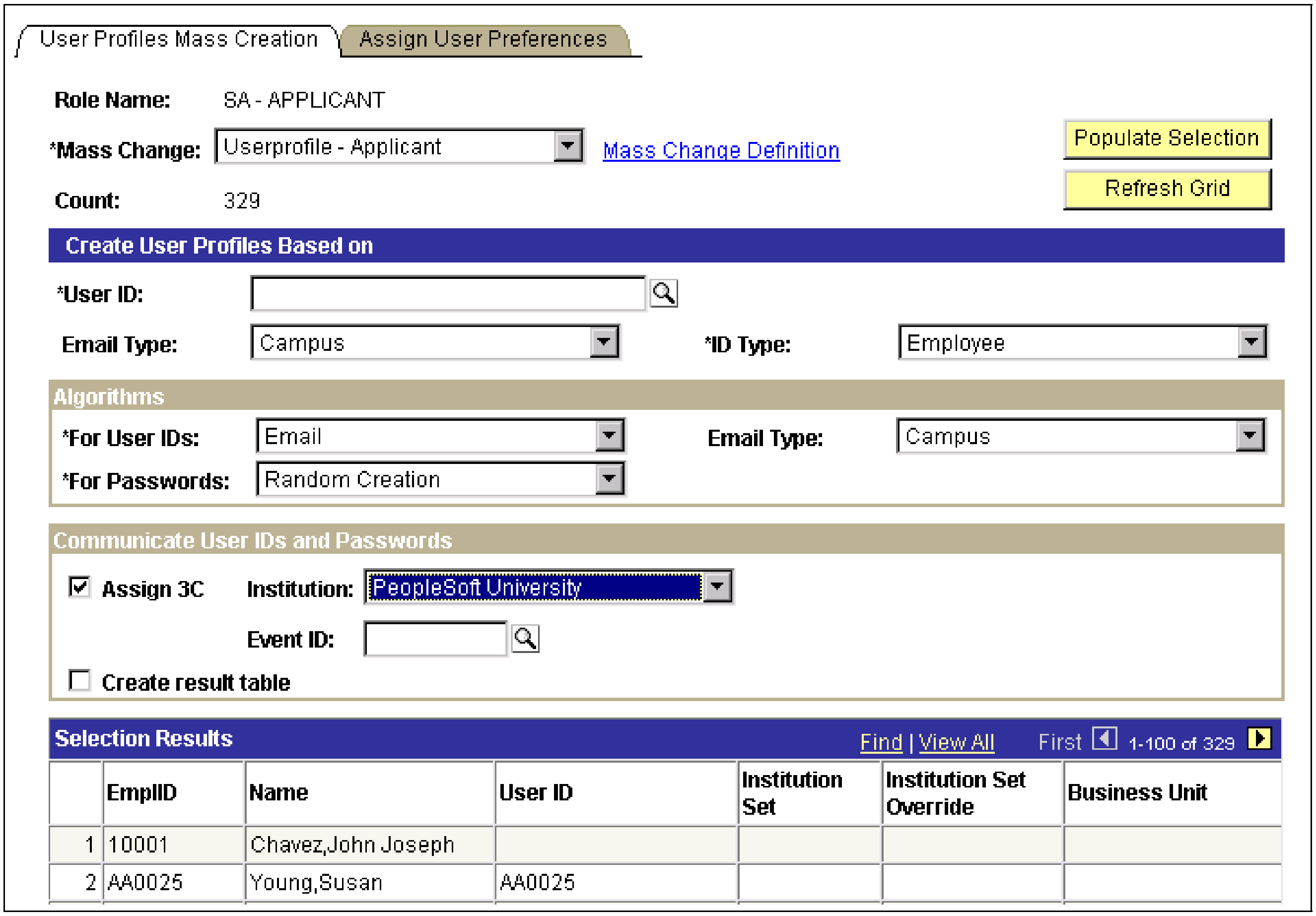
- Select users.
- Assign user preferences.

Pages Used to Set Up User Profiles Management

Page Name	Object Name	Navigation	Usage
User Profiles Mass Creation	OPER_ROLE_DEFN	Design Student Administration, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation	Select the users to manage (using a Mass Change definition) and define other parameters, including the algorithms for creating user IDs and passwords, and the user ID to clone from. You can also assign 3C IDs (Communication, Checklist, and/or Comments) to the user ID you create.
Assign User Preferences	OPER_ROLE_DEFN_ASS	Design Student Administration, Secure Student Administration, Setup, User Profiles Mass Creation, Assign User Preferences	Select user preference default values for institution, academic career, term, and aid year. You can also set up the values for institution set and business unit if your institution is using the online credit card process.

Selecting Users

Access the User Profiles Mass Creation page.



User Profiles Mass Creation page

Select the mass change that the system should use to create the list of users to process. Click the Mass Change Definition link to access the Mass Change Definition component, where you can select different parameters for the mass change selection.

Note. If you modify the criteria for the mass change, do not forget to regenerate the mass change and save it.

Count Shows the number of users selected by the mass change. This field is populated after you click the Populate Selection button.

Populate Selection Click this button to run the selected mass change. A grid (Selection Results) with the list of EmplIDs appears at the bottom of the page when the mass change processing is complete. You should generate the mass change each time that you create user profiles to be sure that you are using the latest data.

Refresh Grid Click this button to delete the mass change results from the buffer and the Search Results table. If you do not refresh the grid after you use it, it may take longer to open this page the next time you access it.

Create User Profiles Based On

The fields in this area are used to base the new user profiles on.

User ID

Select the user ID that you want to use as the model for the user profiles. Enter the SAMODEL user ID if you created one.

Email Type

Select the email type that you want entered in the user profile. The EMAIL_ADDRESSES record is used to determine the email address, based on the type you select. The email address is added in the General page of the User Profiles component (PeopleTools, Maintain Security, Use, User Profiles). If the user does not have an email of the selected type, no email is added to the user profile.

If you select *Preferred,* the email address that has the Preferred check box selected in the Electronic Addresses page is used.

ID Type

The system defaults the value of *Employee.* The User Profiles Management process is run only for that specific ID Type.

Algorithms

Select the algorithms for the system to use when creating new user IDs and passwords.

For User IDs

Select *ID* or *Email* to tell the system which it should use to create the new user ID for the selected users.

If you select *ID,* the user ID will be the letter *W* followed by the last seven characters of the ID. If the ID is less than seven characters, the user ID will be *W* followed by the ID.

Email Type

If you select *Email* in the For User IDs field, select which Email Type to be used. If you select *Preferred,* the email address that has the Preferred check box selected on the Electronic Addresses page is used. The user IDs are the characters before the @ sign, without the space and special characters.

Important! If you select *Email* in the For User IDs field and the user does not have the email type that you selected, a user profile is *not* created for the user. Instead, an error row is added to the temp table (PS_ERR_LOG_USRPRF) with the error code of 4.

For Passwords

Tells the system what it should use to create the new password for each new user ID.

Select *First Name, Last Name, ID* to create passwords using the first two characters of the first name plus the first two characters of the last name plus the ID, if the ID is four characters or less. If the ID has more than four characters, the last four characters of the ID are used.

Select *Random Creation* to create more secure passwords. The random password is created by using the 26 letters of the alphabet and numbers from 1 to 9. (The number 0 is not used so it is not confused with the letter O.)

The length of the password is determined by the Minimum Password Length field on the Password Controls page (PeopleTools, Maintain

Security, Setup). If the value in this field is less than *8,* a password length of eight characters is used.

If the Required Number of Specials field on the Password Controls page is set to a value other than *0,* the same number of special chars from *@, #, $, %, ^, &, *, ~, !, ?* are randomly picked and appended to the end of the password.

Communicate User IDs and Passwords

Assign 3C

Select this check box if you want to assign communications, checklists, or comments to the user IDs that will get created by the process. If you select this check box, select an event ID that the system uses to determine which communications, checklists, and/or comments to assign. Any communications, checklists, or comments should be created in *one* event ID.

This field can be used to assign a communication to tell the new users their user ID and password to access your internet site.

When the User Profiles Management process runs with the Create User Profiles option turned on and the Assign 3C selected, it will invoke the 3C Engine program. 3C Engine will add communications, checklist and/or comments directly to the communication tables, checklist tables and/or comments tables. So, all of the new users created will automatically get communications, checklists and/or comments assigned.

Institution

Select the institution associated with the event ID that you want to select. This is needed for the 3C engine.

Event ID

Select the event ID that you created to assign communications, checklists, and/or comments. This is needed for the 3C engine.

See Chapter 17, "Creating and Maintaining User Profiles," Generating Password Notification Letters, page 258.

Create result table

When this check box is selected, a temporary result table is created when you run the user profile creation process. This temp table is *the only place* where the newly created passwords appear nonencrypted. If you do not select this check box the passwords cannot be seen and therefore cannot be communicated to your new self-service users.

Note. The check box will be selected for you at save time if you selected the Assigned 3C using an Event ID that has been set up with a Comm Key that includes a letter code with the unique SQC CCLTRWOL. The Letter Generation needs the temp table in order to print the user IDs and the passwords on the letters.

See "Supplemental Installation Instructions for PeopleSoft 8 Student Administration and Contributor Relations Applications: Using the User Profiles Management Result Table."

Selection Results

EmplID Shows the list of IDs that match the criteria specified in the mass change selected. If you see an ID listed more than once, this is because more than one user ID was created for the same ID.

Name The name associated with the EmplID.

User ID This is the user ID assigned to the EmplID. This enables you to determine which EmplIDs will have a user ID created by the USERPROFILE process.

Note. If a user ID already exists, the USERPROFILE process will *not* create a new one.

Institution Set The institution set assigned to a user ID by the Assign User Preferences process. This value is mostly used by the online credit card process.

If a user ID already has an institution set associated with it, the institution set will get overridden by the “Assign User Preferences” process if the value that you selected in the Assign User Preferences page is different from the user IDs institution set. The exception to this is if an administrator has manually entered an institution set. In that case, the process does not change the manually entered institution set.

Institution Set Override The institution set entered on the Self Service Institution Set Override page. The batch process does *not* override this value.

Business Unit The business unit assigned to a user ID by the Assign User Preferences process. This value is used by the online credit card process.

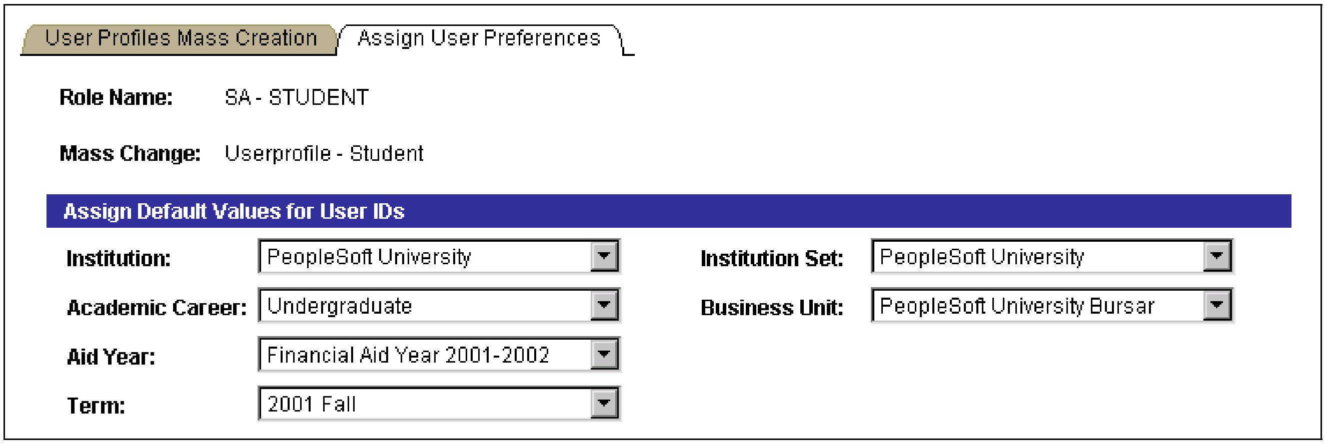
If a user ID already has a business unit associated with it, the business unit will get overridden by the “Assign User Preferences” process if the value that you selected in the Assign User Preferences page is different from the user IDs business unit.

See Also

PeopleTools Security PeopleBook: User Profiles

Assigning User Preferences

Access the Assign User Preferences page.



Assign User Preferences page

The values that you select below override the values created for the user ID in the OPR_DEF_TBL_CS table.

Institution, Academic Career, Aid Year, and **Term** — These fields are only used as user preferences when the user accesses self-service features.

Institution Set — This value is used by PeopleSoft Student Financials. Set it up if you use online credit card processing.

Business Unit — This value is used by PeopleSoft Student Financials. Set it up if you use online credit card processing.

See Also

Chapter 16, “Securing Student Financials,” Setting Security for Credit Cards, page 239

Running the User Profiles Management Processes

It is always a good business practice to regenerate the mass change you are about to use prior to running the USERPROFILE process.

Running the User Profiles Management feature runs the USERPROFILE process. The USERPROFILE process consists of a series of mass changes templates and definitions, and a series of application engine programs.

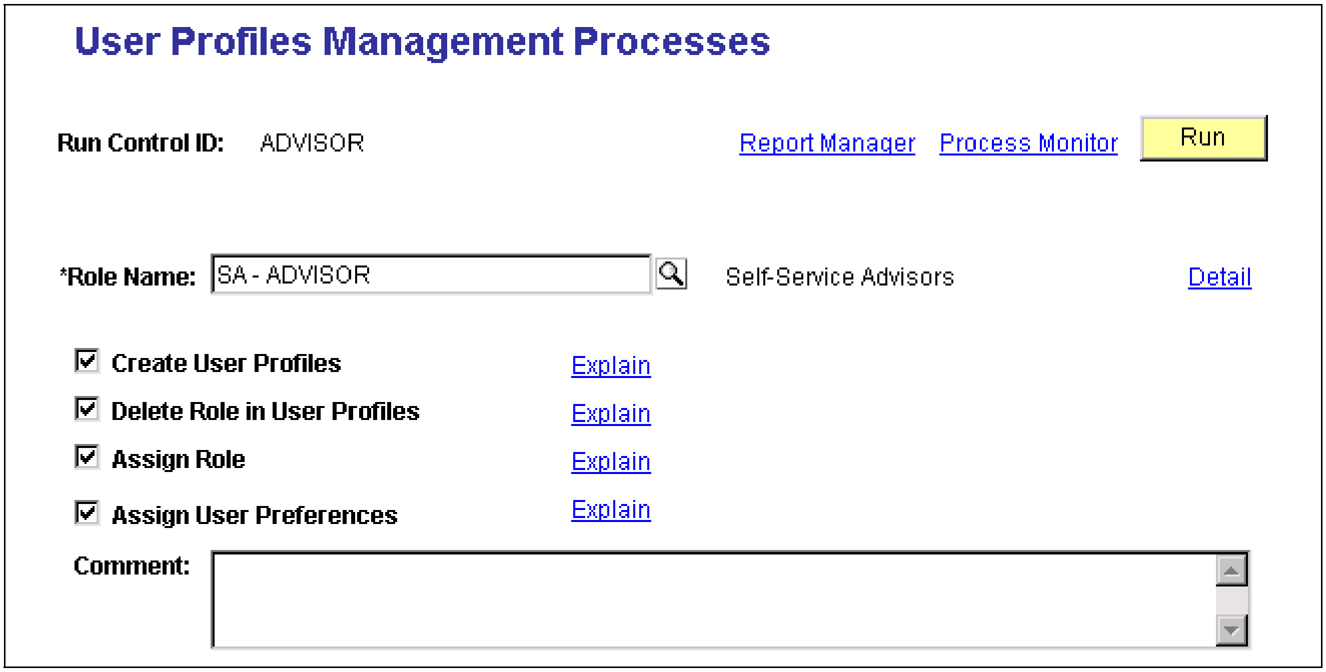
This section discusses how to run the processes that are part of User Profiles Management feature.

Page Used to Run the User Profiles Management Processes

Page Name	Object Name	Navigation	Usage
User Profiles Management Processes	RUNCNT_USERPROFILE	Design Student Administration, Secure Student Administration, Process, User Profiles Management, Runcnt Userprofile	Run any of the four user profile processes. You can create user profiles, delete or assign a role to user profiles, and assign user preferences.

Running User Profiles Management Processes

Access the User Profiles Management Processes page.



User Profiles Management Processes page

Role Name

Select the name of the role to create or maintain. The available options correspond to the roles for which you set up a mass change on the User Profile Mass Creation page.

Detail

Click this link to access the User Profiles Mass Creation page, where you can review and modify your setup before running the processes.

The four check boxes represent the four processes that you can run when you run the USERPROFILE process. You can select one or more of these check boxes.

Create User Profiles

Select this check box to create a user profile for the IDs selected by the mass change that do not already have a user ID. The role you selected is also added to the new user IDs. The user IDs and the passwords are based on the algorithms that you selected on the User Profiles Mass Creation setup page.

When this check box is selected, the USERPROFILE process creates a temp table to list all the user IDs that were created. This temp table is called PS_USRPRF_NWID_TMP.

If you selected, on the User Profiles Mass Creation setup page, to create the result table, this process creates the temp table.

See “ Supplemental Installation Instructions for PeopleSoft 8 Student Administration and Contributor Relations Applications: Using the User Profiles Management Result Table.”

Delete Role in User Profiles

Select this check box to delete the role from the user IDs that were *not* selected by the mass change. In other words, it will delete the role name on the user profiles that no longer meet the criteria for the role name specified.

For example, if you want to give self-service access to the applicants of the current term, this function deletes the Applicant role for all the user profiles that have the role but are not part of the current term.

When this process runs, it creates a temp table so you can review which IDs had the specified role removed. The temp table is called PS_USRPRF_DEL_TMP.

Assign Role

Select this check box to assign the role to the existing user IDs selected by the mass change.

This process creates a temp table called PS_USRPRF_ASG_TMP. It lists the user IDs that had the role assigned to them.

Note. This is the same process that you can run from the Dynamic Members page in the PeopleTools, Maintain Security, Use, Roles component. If you assign roles using the Maintain Security menu, be sure the query that you use has the same criteria as the mass change.

To provide you with examples, PeopleSoft delivers 11 queries corresponding to the 11 mass changes. A list of delivered queries is available in the Technical Notes section at the beginning of the chapter.

See Chapter 17, "Creating and Maintaining User Profiles," Technical Notes, page 242.

Assign User Preferences

Select this check box if you want to assign the user preferences from the Assign User Preferences page. These user preferences are assigned to all user IDs selected by the mass change. If a user ID already has a value set for the preferences, it is overridden by this process (except if there is a value added to the Institution Set Override).

If you are using online credit card processing, you should select this process to assign a business unit and an institution set to the user IDs.

The process creates a temp table called PS_ASSN_SETVAL_TMP. Use this table to review which IDs had the user preferences assigned to them.

Comments

Enter any comments about your selections. The selected settings are associated to your user ID and the run control ID, so when you use those same settings, you can see the comments entered. This field is for informational purposes only.

Explain

Use these links to see the explanation for the selected check box.

Run

Run the USERPROFILE process. When you run this process, do not select a Type or a Format on the Process Scheduler page.

Error Log Information

An error log (PS_ERR_LOG_USRPRF) is created by the USERPROFILE process that lists any IDs for which a user profile was not created. Be sure you review the error log after running any of the processes. In the error log the following error codes are used.

1	In the Assign Role process, the save method was not completed for the existing user ID. The system also assigns this error code if it encounters a non-valid user ID. A valid User ID follows the following conditions: • No space • No comma • Not equal to PPLSOFT • Not longer than 30 characters
2	In the Create User Profile process, the save method was not completed for the newly created user ID.
3	In the Create User Profile process, the newly created user ID cannot be saved because the user ID already exists.
4	In the Create User Profile process, no user ID can be created because *Email* was selected in the For User IDs field on the User Profiles Mass Creation page.
5	In the Delete Role process, the save method was not completed for the existing user ID.

After you run the processes, you can go back to the User Profiles Mass Creation page (Design Student Administration, Secure Student Administration, Setup, User Profiles Mass Creation, User Profiles Mass Creation) and click the Populate Selection button to see which user IDs were created and what Business Unit and Institution Set was assigned, if any where defined. You can also review the different temp tables mentioned above created by the processes.

See Also

Using PeopleSoft Applications PeopleBook, "Working with Processes and Reports.”

Generating Password Notification Letters

You can create letters to notify new users, created by the User Profiles Management process, of their assigned user ID and password using the letter generation process. This section refers to the temporary result table. This table includes sensitive information including the user IDs and the passwords. To provide a level of security in the PeopleBooks, PeopleSoft does not document how the temporary result table functions here.

This section discusses how to:

• Set up the password notification letters.

• Run the letter generation for the password notification letter.

See Also

Supplemental Installation Instructions for PeopleSoft 8 Student Administration and Contributor Relations Applications: Using the User Profiles Management Result Table

Setting Up the Password Notification Letters

To set up information for notification letters and use the letter generation process, you must select the appropriate Event ID and Institution on the User Profile Mass Creation page. When the User Profiles Management process runs with the *Create User Profiles* option turned on, it invokes the 3C Engine program. The 3C Engine will add communications directly to the communications table, so all of the new users created will have a communication assigned to their record.

In order to create password notification letters, the Event ID must include a Communication Speed Key (Comm Key) that has been defined with a Letter Code that is set up with the Function equal to *General* and the SQC Name equal to *CCLTRWOL.* This setup is completed on the Standard Letters page.

Warning! You should not modify the SQC named CCLTRWOL.sqr in any way.

When the Event ID includes a Letter Code with the SQC equal to CCLTRWOL, the same process creates a temporary result table where all of the new user IDs and their passwords are stored. The letter generation process reads this table to extract the passwords and the use IDs.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Managing Communications"

Supplemental Installation Instructions for PeopleSoft 8 Student Administration and Contributor Relations Applications: Using the User Profiles Management Result Table

Running Letter Generation for Password Notification Letters

After you have run the Create User Profiles process, you can run the letter generation process (CCLTRGEN) to extract the data. To run letter generation go to the Letter Generation - General Parameters page (Build Community, Communications, Process, Letter Generation).

When you run the letter generation process (CCLTRGEN) for password notification letters, the system updates the temporary result table with a flag indicating that the data has been extracted and the rows are ready to be deleted from the temp table. Once the temp table has been cleaned up, any subsequent attempt to run a communication for password notification letters for those user IDs and passwords results in a critical error.

Note. When running the letter generation process (CCLTRGEN) for notification letters, make sure both the Produce Communication and Complete Communication check boxes under Missing Critical Data are cleared. With these check boxes cleared the system will not extract and complete a communication if critical data (for example, address information) is missing. This gives you a chance to add or correct the missing data for the individual ID specified in the log. You can then re-run the letter generation process. If you do not go back and run those communications, you should make sure to use the clean up process to delete these rows from the results temp table, even though letter generation did not set the ready to delete flag. If you run the process with these check boxes selected, the system creates the communication despite the missing data and updates the temporary result table with the flag to indicate that these rows are now ready to be deleted.

Warning! When the letter generation process extracts the data, it creates a dat file (CCLTRGEN.DAT) and two csv files (CCLTR<LETTERCODE>.CSV for letters and CCLBL<LETTERCODE>.CSV for labels). These files are either stored on the temp directory of the process scheduler server or on the computer where the extract file path has been redirected. (You redirect the extract in the Date/Merge Parameters page of the Letter Generation component.) The passwords in the data extracts are unencrypted. No process automatically deletes the extracts. They are available for running future communications. To prevent misuse, your institution should take the appropriate security measures. For example, be careful to write the extract to a secure directory, making sure the CCLTRGEN macro points to the same directory. Remember to then manually delete the data extract after you have done the merge with the letter template.

The two extract files (csv files) that include the non-encrypted passwords are overridden every time you run the letter generation process for the letter code you set up to run the password notification letters. If you are not planning to run the macro to do the merge with the data extract and the letter template right away, you have to save them somewhere using a different name. Make sure they are stored in a secure folder and they are deleted after the communication is produced.

PeopleSoft delivers the following items specifically for generating the notification letters.

- Sample Microsoft Word template called CCLTROPR.doc for printing notification letters. You can modify the template or use it to create new templates so you can create different letters. If you decide to use this template and you do not rename it, the letter code you create must be named OPR.
- Unique SQC called CCLTRWOL. The CCLTRWOL SQC generates the variable data necessary for the password notification letters associate with the letter code you create. You should not modify this SQC.

Here is an example of a password notification letter created with the sample template CCLTROPR.doc.

July 23, 2001
Janice Diller
44125 Ventura Blvd.
Encino, CA 91465

Dear Janice,

Welcome to PeopleSoft University Online! Through the PSU Online site you'll be able to take care of most of your business with the university.

To access your information, you will need the following information:
User ID: WSR6002
Password: EUR2J54A

You are urged to keep this information private - anyone with this information will be able to access your account! Your initial word has been system generated; we recommend that you change it after you login the first time.

What you can do at PeopleSoft University's site depends on the profile we have for you in our records. If you think this is incorrect or incomplete, or if you have any other problems using PeopleSoft University on the web, please contact the computer Services Division at (313) 555-1234.

Registrar

Example of password notification letter

Warning! When you merge the letter template with the extract files, a copy of the letters is saved on the local drive of the computer that was used to merge and print the letters. Be sure to delete these local copies because they contain the nonencrypted passwords.

Resolving Issues for the User Profiles Management Process

This section is intended to help you run the User Profiles Management process successfully. Use this section if you receive an error or if the process is not running successfully.

If the mass change is not selecting any IDs?

If the Count field on the user Profiles Mass Creation page is showing zero after you click the Populate Selection button, you have no IDs selected for the process. When this happens, if you run the process it runs successfully, but you will not see any IDs created or maintained. You should regenerate the mass change by going to the Mass Change Definition in the Generate SQL page. Do not forget to save the mass change. Run the process again. If the Count field is still showing zero, your criteria might not be met by anybody in your database.

If the process abnormally ended?

If the process has abnormally ended, the next time you run the process you might not be successful because the following temp tables will have stored data:

- PS_ENG_COMM_TMP
- PS_EMPLID_GRP_TMP

If it is the case, delete the tables and run the process again.

CHAPTER 18

Using PeopleSoft Process Scheduler

This chapter provides an overview of the PeopleSoft Process Scheduler and discusses how to:

- Establish Run Controls.
- Specify Process Parameters.

Understanding PeopleSoft Process Scheduler

PeopleSoft Process Scheduler enables you to run processes instantly or to schedule them to run once or on a recurring basis. These processes run remotely on a server. The process monitor shows you the status of processes and enables you to cancel, delete, hold, or requeue the processes if necessary. Even though each PeopleSoft application employs unique processes to accomplish different tasks, you run these processes the same way.

The processes that come with PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions accomplish a wide variety of tasks. For example, you use a PeopleSoft Recruiting and Admissions process to load external test scores into your system and to activate applicants, a PeopleSoft Financial Aid process to load applications, a PeopleSoft Student Records process to activate students, and so on.

Most of the information you need to use PeopleSoft Process Scheduler is in the PeopleTools documentation. This chapter covers information on setting up run controls for your processes so that you do not have to enter run parameters each time you run a process.

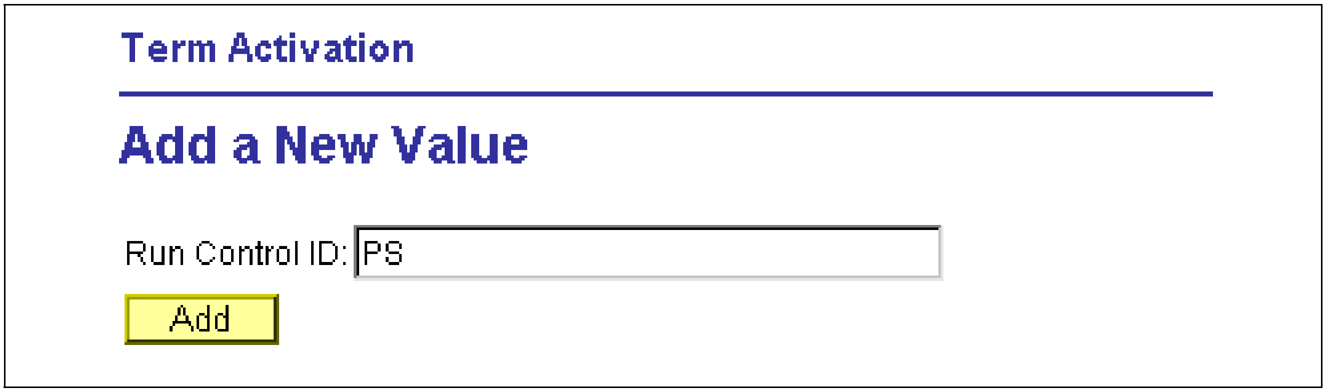
See Also

PeopleTools Process Scheduler PeopleBook

Establishing Run Controls

Before running a process, specify criteria to designate which data to process and when and where to process it. To specify which data to process—such as test scores or financial aid applications—use the various pages that your system provides for defining process parameters. When running a process on a regular basis, you can bypass these steps by using a run control, which loads the parameters for you. You must use a run control each time you run a process, even if you're running the process only once.

The first step in running a process is to select the process from the appropriate menu in your application (usually the Process menu), with an action of Add or Update/Display. Choose Add to establish new run parameters, and choose Update/Display to run a process for which a run control exists. For instance, to create a new run control for the student Term Activation process in PeopleSoft Student Records, select Manage Student Records, Manage Academic Records, Process, Term Activation. When you select a process from the menu, the Run Control ID box appears on the page.



Creating a new run control (example of the Term Activation process)

For a new run control, enter a name in the Run Control ID field—without spaces between the letters—and click Add. Click theAdd button to open the run control page, where you define the process parameters. All of the fields on the page are empty. You must specify the criteria for the system to process. The next section shows an example of how to specify process parameters. When you enter an existing run control in Update/Display mode, the system automatically populates the fields on the parameters page with the data that you specified when you defined the run control.

Note. If you're running a COBOL process, do not use a run control ID with a slash (/) character. The slash character causes the process to fail.

See Also

Introduction to PeopleSoft Reporting PeopleBook, "Running Standard Reports," Run Controls

Specifying Process Parameters

For each new run control, define which data that you want the system to process. Your choices depend on the process that you are defining. The system saves and displays the field values that you select on the process page and recalls these field values when you use the same run control ID again. However, you can change field values before running the process. All changes are saved and used as the default the next time you use that run control ID. After defining the necessary parameters for a process, you are ready to direct the system when and where to execute the process. You do this on the Process Scheduler Request page.

See Also

Using PeopleSoft Applications PeopleBook, "Working with Processes and Reports"

CHAPTER 19

Using Mass Change

This chapter provides an overview of mass change in PeopleSoft Student Administration and Contributor Relations Solutions and discusses how to:

- Process mass change.
- Set up mass change security.
- Define specific parameters for mass change definitions.

Understanding Mass Change in Student Administration and Contributor Relations

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions provide many tools to process your information. However, because much of what you do is unique to your institution, PeopleSoft enables you to create your own unique processes. One way of doing this is to create mass changes.

The PeopleSoft Mass Change utility is a Structured Query Language (SQL) generator that you use to perform high-volume business transactions, such as updating data for multiple students without accessing each student record online. Its function is similar to PS/Query, but while PS/Query retrieves data from your database, the PeopleSoft Mass Change utility makes changes to the database.

The PeopleSoft Mass Change utility is commonly used for the following tasks:

- Performing high-volume, set-oriented transactions.
- Copying data from table to table.
- Archiving table data.
- Performing transactions not normally supported through the pages.

Note. The mass change types and templates delivered with PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions should serve as examples for your particular needs. The functionality provided is representative of common business practices; however, you may need to modify the delivered mass change types and templates to fit your specific requirements.

Mass change is a way of breaking down statements that alter data (such as update, insert, and delete statements) into a hierarchy of three components: types, templates, and definitions. The end user only needs to alter the simplest level in order to change the parameters used in a given run. The PeopleSoft Mass Change utility includes these three components:

1. *Types* are the lowest level components.

A mass change type defines the type of SQL statements to be generated, the records involved, and the sequence in which they run. Application developers familiar with SQL and the database design typically define mass change types.

2. *Templates* are built upon mass change types.

   Mass change templates are used to specify which fields make up the WHERE clause of the SQL statement and which fields can be hard-coded with a particular value. Application developers typically define mass change templates.

3. *Definitions* are built upon mass change templates and are generally created and run by end users.

   Mass change definitions are used to specify the values and operators for each field in the statement's WHERE clause and default fields and to generate the actual SQL statement.

You can run mass change definitions individually or combine them into mass change groups and run them together.

Note. Anyone who defines mass change types or templates should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft database in question.

See Also

PeopleTools: Data Management, "Mass Change"

Processing Mass Changes

Processing mass changes consists of a definition phase and a processing phase. First, you define the selection criteria and changes for the selected data; then you run the Structured Query Reports (SQRs) that process the changes you defined.

Note. The development staff must create mass change types and templates before you can use the mass change definitions discussed in this section.

This section discusses how to:

• Define the mass change.

• Process the mass change.

Defining the Mass Change

The definition phase comprises the following steps:

1. Choose a mass change template and use it to create a mass change definition.
2. Outline the criteria for selecting rows and identify the columns and values to be changed.
3. Generate the SQL statement.

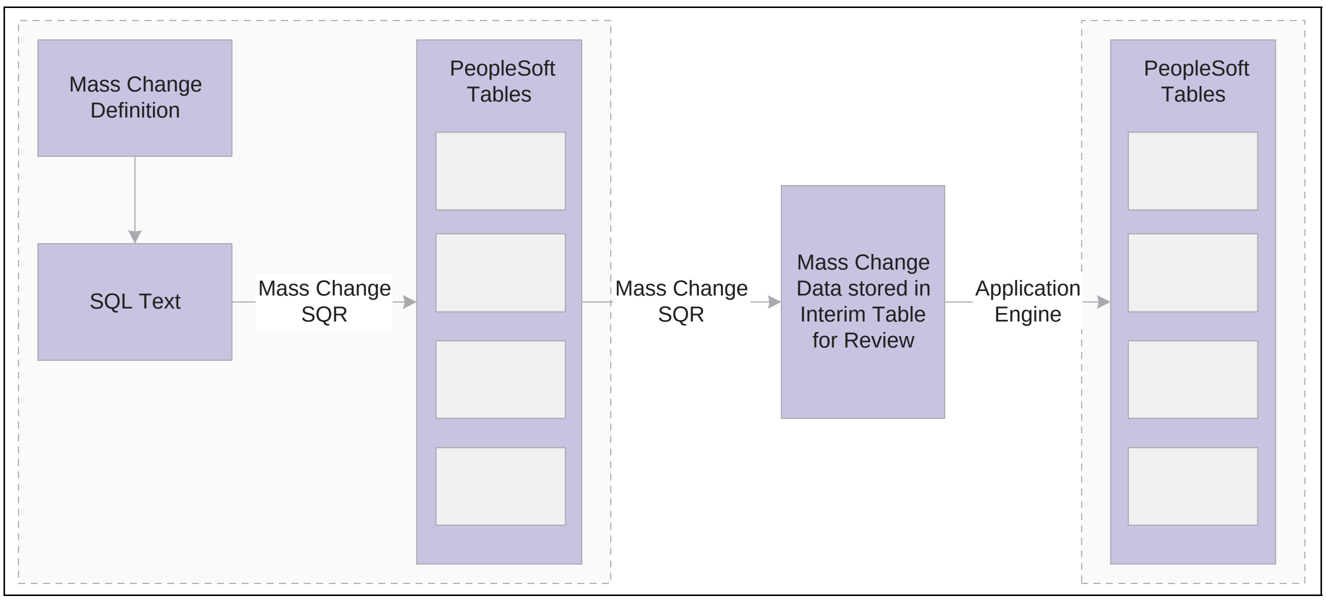
Processing the Mass Change

The processing phase comprises the following steps:

1. Run the Mass Change SQR to select, change, and transfer the data to the temporary tables.
2. Review the data for accuracy (optional, but recommended).

   PeopleSoft delivers certain features that enable you to review the mass change results. For example, results of mass change definitions that insert communications or checklists can be viewed using the Mass Change Result page (Build Community, Communications, Inquire, Mass Change Result). Other PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions applications also have pages for reviewing mass change results. These are described in the PeopleBook for the application.
3. Run the appropriate process to load the data from the temporary tables into your PeopleSoft tables (if applicable).

   For example, to insert communications or checklists, you run the 3C Engine process to insert your mass change results into your PeopleSoft tables.



Mass change in PeopleSoft Student Administration and PeopleSoft Contributor Relations Solutions

Setting Up Mass Change Security

Prior to using the PeopleSoft Mass Change utility for the first time, you should consider who in your organization should be authorized to use mass change templates and run mass changes. Because the PeopleSoft Mass Change utility is a powerful tool with the ability to modify large portions of your data, PeopleSoft recommends that you carefully consider mass change security.

Mass change security governs whether users assigned to a particular permission list can run mass changes online, the templates available to a user, and what mass changes the user can run. To set Mass Change security, go to PeopleTools, Maintain Security, Use, Permission Lists.

See Also

PeopleTools:Data Management, "Mass Change"

Defining Specific Parameters for Mass Change Definitions

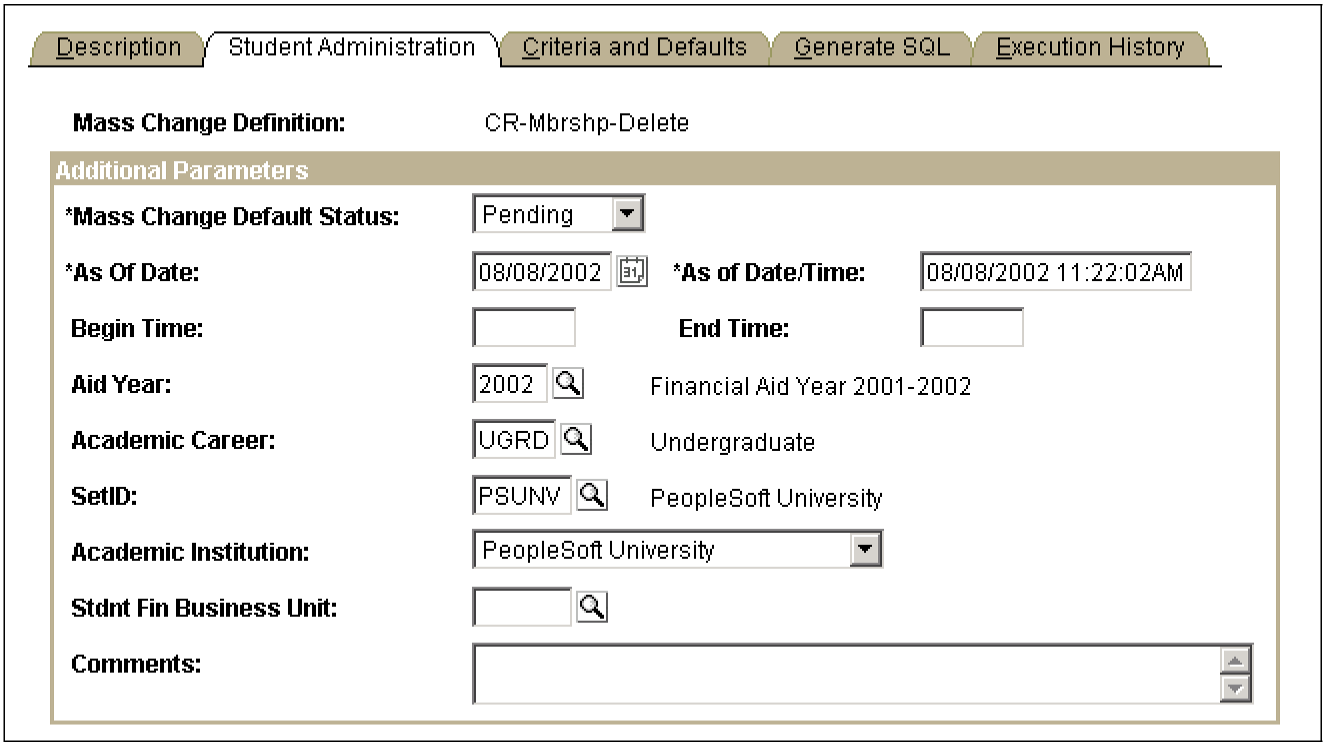
The Student Administration page in the Mass Change Definition component enables you to specify additional parameters that are used only in PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions.

Page Used to Define Specific Parameters for Mass Change Definitions

Page Name	Object Name	Navigation	Usage
Student Administration	MC_DEFN_SA	You can access this page through multiple navigation paths. This list presents some representative paths. • Design Student Administration, Design Financial Aid2, Setup L-M, Mass Change Definition (SA), Student Administration • Develop Enrollment, Evaluate Applicants, Use, Mass Change Definition, Student Administration • Build Community, Communications, Use, Mass Change Definition, Student Administration	Set specific parameters for your mass change definitions. The resulting mass change SQL statements include these parameters.

Setting Specific Parameters for Mass Change Definitions

Access the Student Administration page.



Student Administration page

Mass Change Default Status	This field is not used by PeopleSoft Student Administration Solutions or PeopleSoft Contributor Relations Solutions. This field value sets the status value of all mass change records created when you run this mass change definition. The default status is used with mass change definitions run using database agents. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions mass change definitions are not delivered to use database agents.
As Of Date	The current date appears by default. The value for this field must be the current date for the mass change definition to run. This field is used as a default date in certain mass change definitions.
As of Date/Time	The current date/time appears by default when you access the page. The value for this field must be the current date/time for the mass change to run. If you make a change to the mass change definition, you must save it before you run it.
Begin Time	Not currently used.
End Time	Not currently used.
Aid Year, Academic Career, SetID, Academic Institution and **Stdnt Fin Business Unit** (student financials business unit)	Enter values to be used as defaults by the mass change definition. These values are also used for prompting in the Criteria and Defaults page.
Comments	Enter any comments about this mass change definition.

See Also

PeopleTools: Data Management, "Mass Change," Definitions

CHAPTER 20

Setting User Defaults

This chapter discusses how to enter user defaults.

See Also

PeopleTools: Security, "User Profiles"

Entering User Defaults

Default values are loaded into data pages automatically for a specific user ID. The user defaults that you set in the User Defaults component can be overridden on any page in the system. User defaults can save time and minimize data entry errors; however, user defaults are entirely optional.

Users should be familiar with the pages and fields they work with before setting defaults. This section does not describe the function of each field on the defaults pages since they are fully documented in the appropriate application PeopleBook where the field is used. When selecting a default value for a field, you can select only those values for which the user ID has security access. If the user ID does not have access to a field, you cannot select a default value.

This section discusses how to:

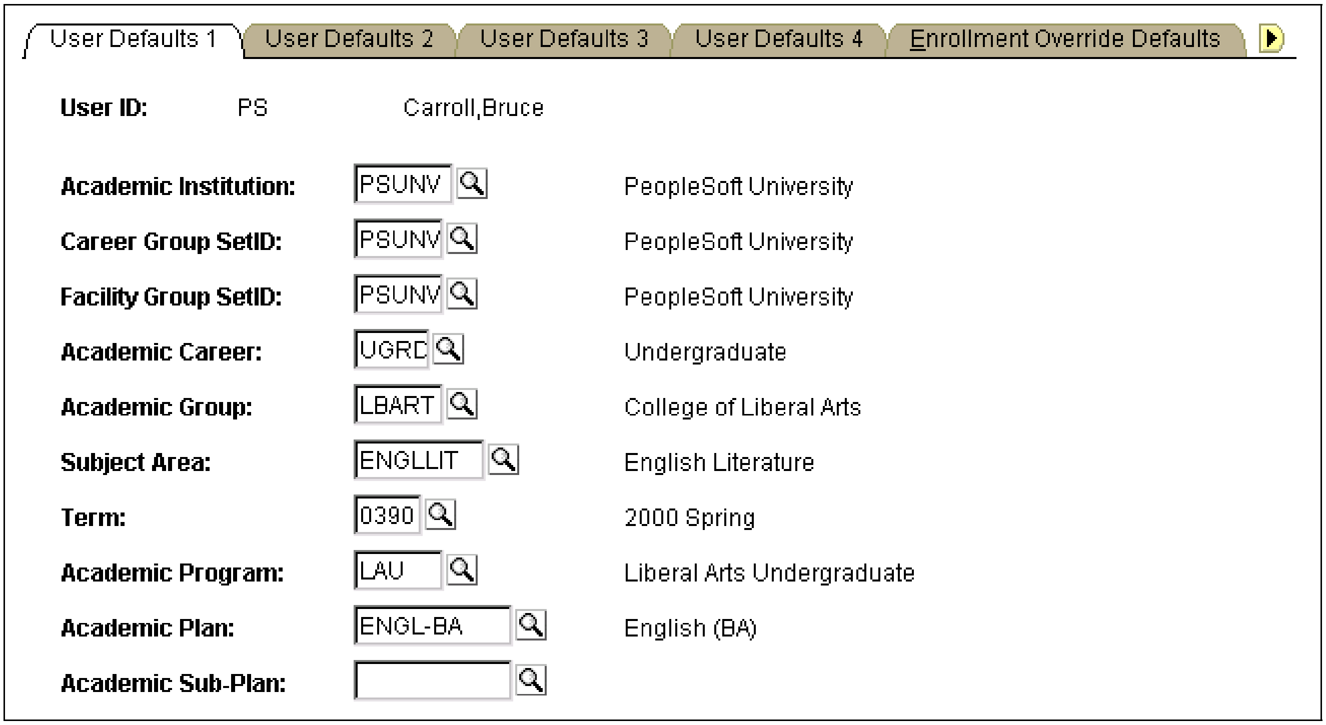
- Set defaults for academic information.
- Set defaults for financial and admissions data.
- Set defaults for admissions application data.
- Set defaults for printing transcripts.
- Set defaults for enrollment overrides.
- Set defaults for communication keys.
- Select the types of 3C group access.

Pages Used to Enter User Defaults

Page Name	Object Name	Navigation	Usage
User Defaults 1	OPR_DEF_TABLE_CS1	Design Student Administration, Specify User Defaults, Use, User Defaults, User Defaults 1	Set defaults for the Academic Institution, Term, Career, Academic Program, and other fields.
User Defaults 2	OPR_DEF_TABLE_CS2	Design Student Administration, Specify User Defaults, Use, User Defaults, User Defaults 2	Set defaults for the SetID, Aid Year, Application Center, Cashier's Office, and other fields.
User Defaults 3	OPR_DEF_TABLE_CS5	Design Student Administration, Specify User Defaults, Use, User Defaults, User Defaults 3	Set defaults for admissions application data.
User Defaults 4	OPR_DEF_TABLE_CS4	Design Student Administration, Specify User Defaults, Use, User Defaults, User Defaults 4	Set defaults for printing transcripts, including transcript output destinations and transcript type.
Enrollment Override Defaults	OPR_DEF_TABLE_CS3	Design Student Administration, Specify User Defaults, Use, User Defaults, Enrollment Override Defaults	Set default enrollment overrides for a specific user ID.
Communication Speed Keys	OPR_SPDKEY_FUNC	Design Student Administration, Specify User Defaults, Use, User Defaults, Communication Speed Keys	Set default values for communication keys for a specific user ID.
User 3C Groups Summary	OPR_GRP_3C_SUM	Design Student Administration, Specify User Defaults, Use, User Defaults, User 3C Groups Summary	Select the type of 3C group access by specifying inquiry or update access for data in 3C groups.

Setting Defaults for Academic Information

Access the User Defaults 1 page.



User Defaults 1 page

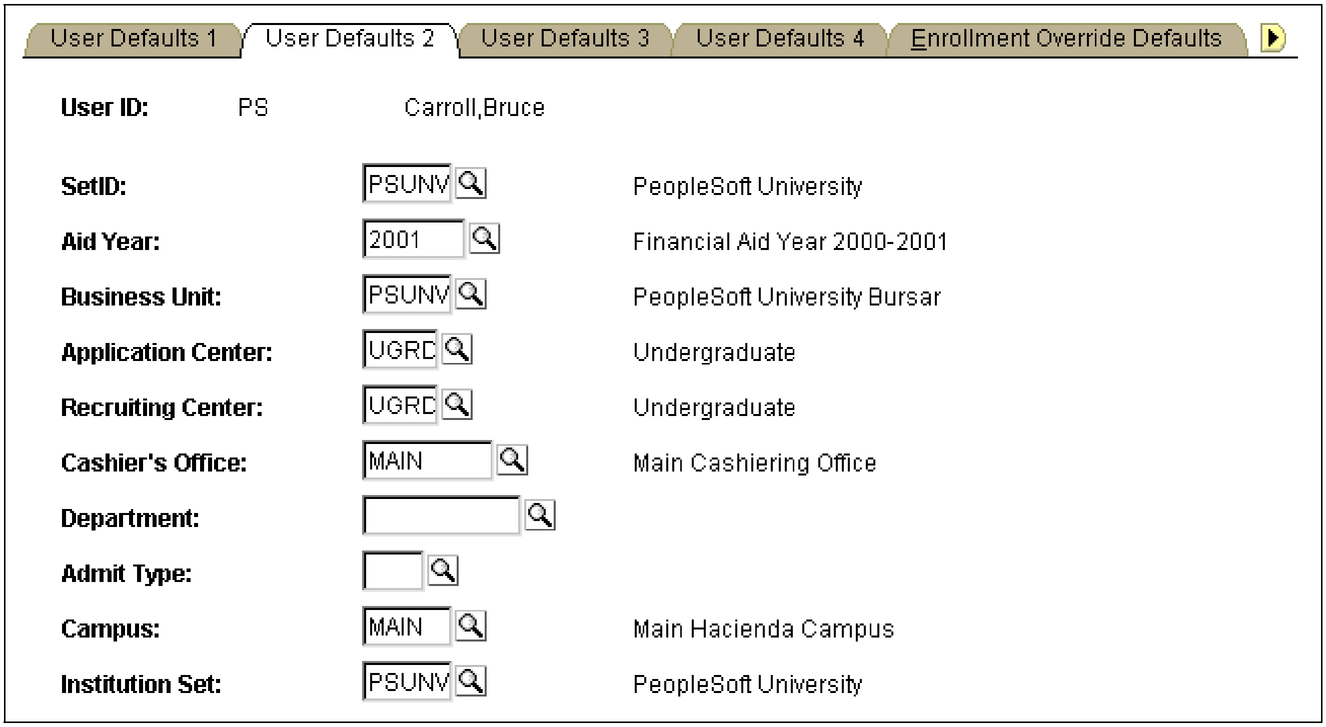
Select the value that you want to set as a default value for each field on this page. You may decide you want to set default values for some but not for others. All fields are optional.

See Also

PeopleSoft Student Records PeopleBook.

Setting Defaults for Financial and Admissions Data

Access the User Defaults 2 page.



User Defaults 2 page

Select the value that you want to set as a default value for each field on this page. You may decide you want to set default values for some but not for others. All fields are optional.

See Also

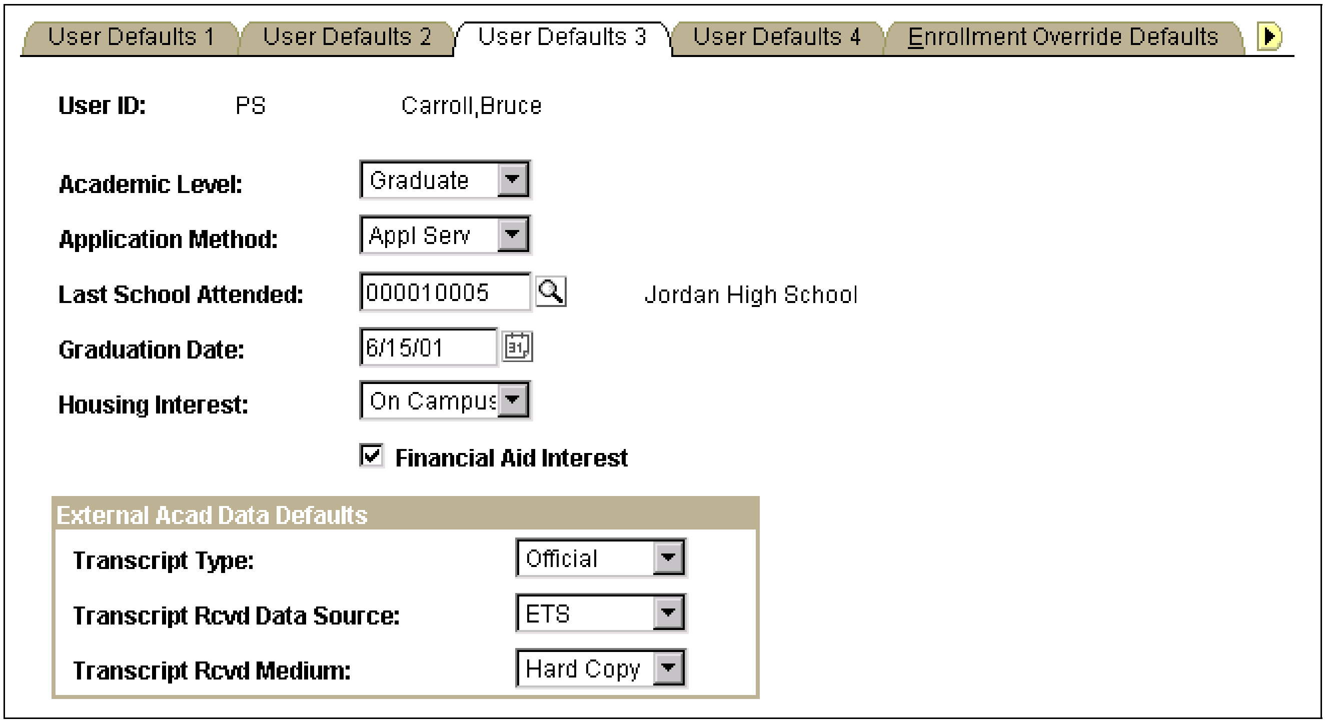
PeopleSoft Student Financials PeopleBook.

PeopleSoft Financial Aid PeopleBook.

PeopleSoft Recruiting and Admissions PeopleBook.

Setting Defaults for Admissions Application Data

Access the User Defaults 3 page.



User Defaults 3 page

Select the value that you want to set as a default value for each field on this page. You may decide you want to set default values for some but not for others. All fields are optional.

Academic Level Select an academic level for the applicant, such as *Freshman, Junior*, or *Not Set.*

Application Method Select the medium by which your institution received the student's application, such as *Diskette, Hard Copy, Web Appl* (web application).

Last School Attended Enter a value in this field if you key a lot of transfer applications from a certain school. The values depend on what has been set up in your system.

Graduation Date Enter a value here if many applicants share the same graduation date. There is no delivered default value for this field.

Housing Interest Select *Commuter, Off Campus,* or *On Campus.*

Financial Aid Interest Select this check box to have the Financial Aid Interest flag set on the admissions application information.

Transcript Type Select *Official* or *Unofficial* for this field to indicate if a transcript is official or unofficial.

Transcript Rcvd Data Source (transcript received data source) Select the data source used to transmit the application to your institution.

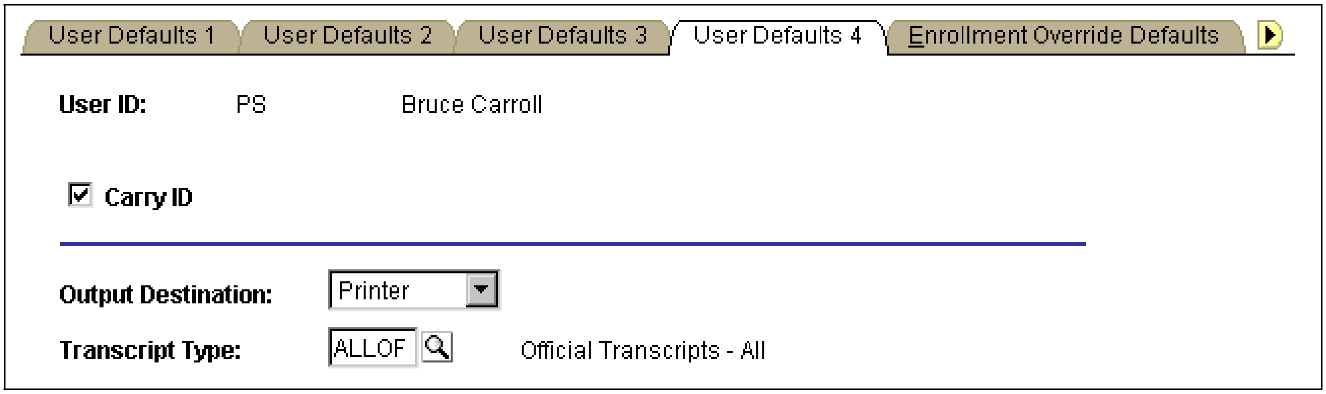
Transcript Rcvd Medium (transcript received medium) Select *EDI* or *Hard Copy* to indicate the medium by which the transcript was received at your institution.

See Also

PeopleSoft Recruiting and Admissions PeopleBook

Setting Defaults for Printing Transcripts

Access the User Defaults 4 page.



User Defaults 4 page

Carry ID

If this check box is selected, your institution has decided that the system should carry the ID of the last individual or organization you enter or select from search box to search box and page to page. With Carry ID, you do not have to reenter or reselect the ID each time if you want to continue editing or reviewing data for the same individual or organization.

Output Destination

Select the location you generally use for printing transcripts. Select *EDI, Page,* or *Printer.*

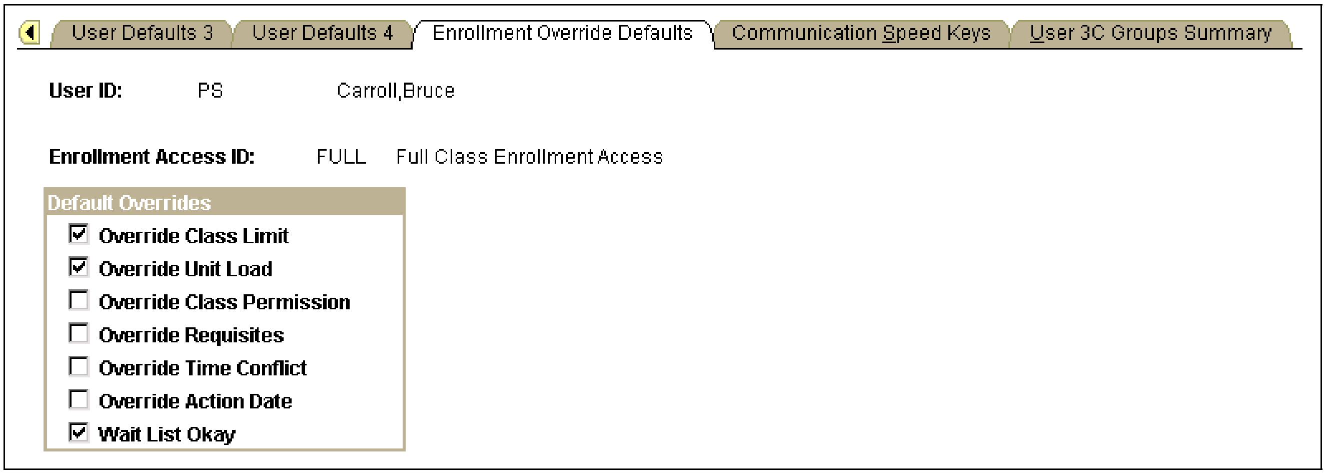
Note. Output destination values are shipped with your system as translate values. These translate values should not be modified in any way. Any modifications to these values will require a substantial programming effort.

Transcript Type

Select the default value for the type of transcripts you generally print. Your options depend on which values are in your system.

Setting Defaults for Enrollment Overrides

Access the Enrollment Override Defaults page.



Enrollment Override Defaults page

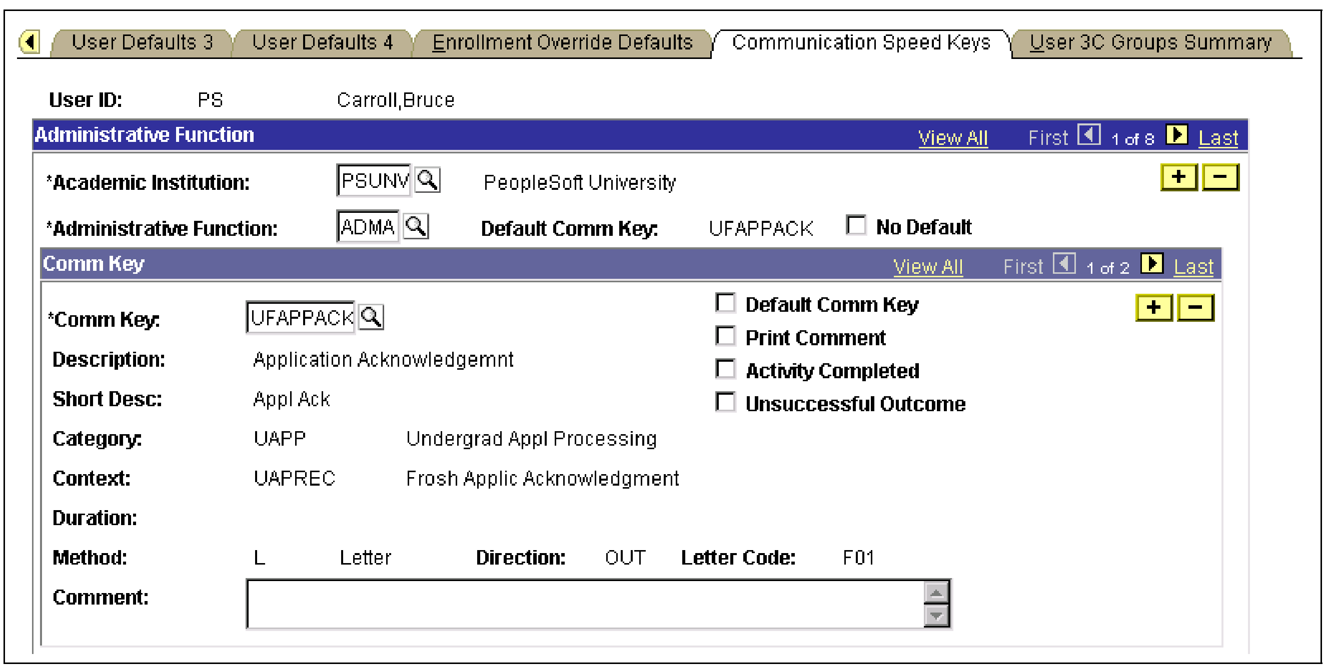
Select the default overrides for the enrollment access ID shown. Only those overrides that this enrollment access ID has access to can be set as defaults. Any overrides that have been set as defaults when the enrollment access ID was set up are selected here. You can override those settings.

See Also

Chapter 15, "Securing Student Records," Setting Up Enrollment Access IDs, page 210

Setting Defaults for Communication Keys

Access the Communication Speed Keys page.



Communication Speed Keys page

Communication keys enable you to create a shorthand method of specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own default communication keys in addition to the base communication keys.

Administrative Function

Set default communication keys for multiple administrative functions by entering additional rows for administrative functions.

Academic Institution	Select the academic institution that you want to use for the administrative function.
Administrative Function	Select the administrative function to which you want to assign default communication keys.
Default Comm Key (default communication key)	This field displays the communication key that you select as the default for that administrative function.
No Default	If you do not want to specify a default communication key for an administrative function, you can either select this check box, or not select a default communication key in the Comm Key (communication key) scroll area. In either of these cases, the Default Comm Key field should become blank.

Comm Key

You can define only one default communication keys for each administrative function. You can set multiple communication keys by adding additional rows in the Comm Key scroll area.

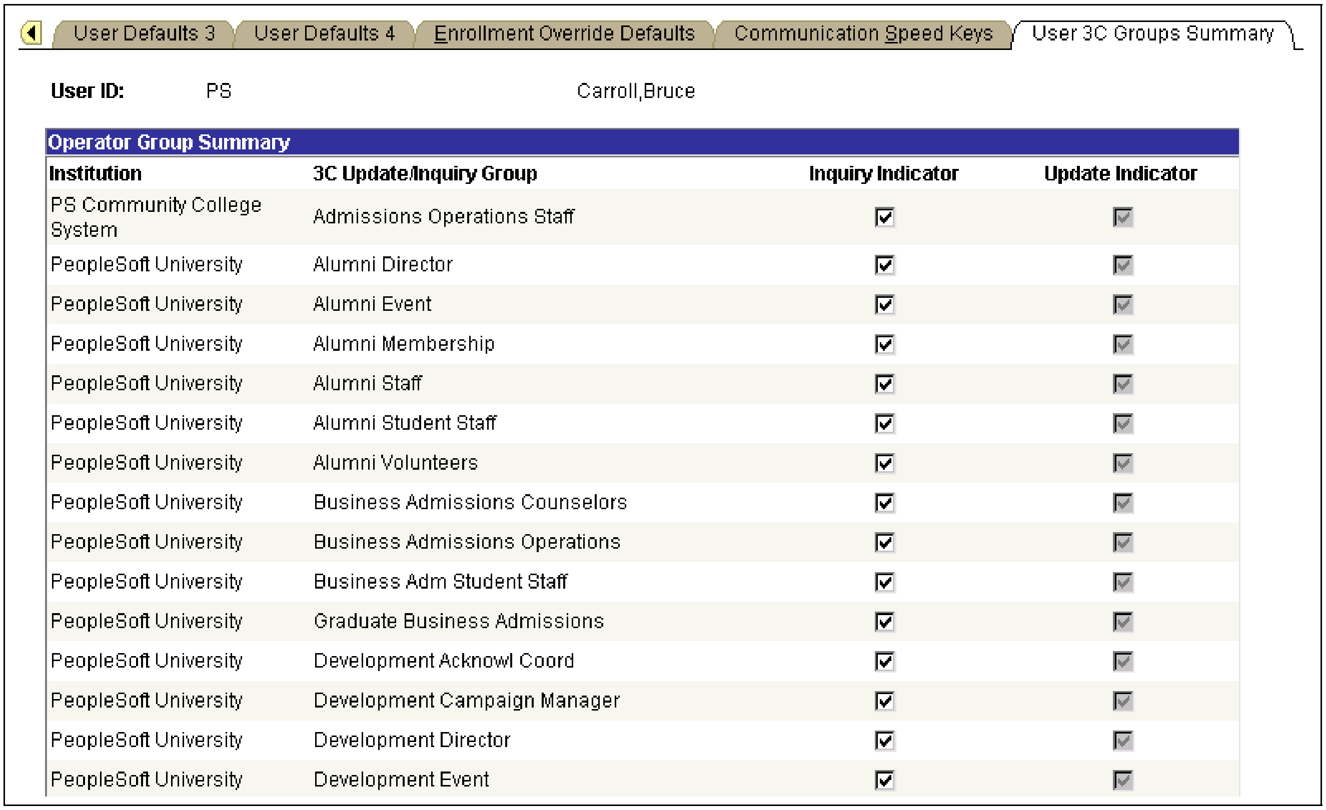
Comm Key (communication key)	Select the communication key that you want to use as a default for the administrative function. Once you have entered a value in this field the *Category, Context, Method* and other communication key values appear.
Default Comm Key (default communication key)	Select this check box to set this Comm Key as the default for this Administrative Function.
Print Comment	Select this check box to default the Print Comment flag to *True* for communications using this Comm Key.
Activity Completed	Select this check box to default the Activity Completed flag to *True* for communications using this Comm Key.
Unsuccessful Outcome	Select this check box to default the Unsuccessful Outcome flag to *True* for communications using this Comm Key.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Communications”

Selecting the Type of 3C Group Access

Access the User 3C Groups Summary page.



User Defaults 3 | User Defaults 4 | Enrollment Override Defaults | Communication Speed Keys | User 3C Groups Summary

User ID: PS Carroll,Bruce

Operator Group Summary

Institution	3C Update/Inquiry Group	Inquiry Indicator	Update Indicator
PS Community College System	Admissions Operations Staff	☑	☑
PeopleSoft University	Alumni Director	☑	☑
PeopleSoft University	Alumni Event	☑	☑
PeopleSoft University	Alumni Membership	☑	☑
PeopleSoft University	Alumni Staff	☑	☑
PeopleSoft University	Alumni Student Staff	☑	☑
PeopleSoft University	Alumni Volunteers	☑	☑
PeopleSoft University	Business Admissions Counselors	☑	☑
PeopleSoft University	Business Admissions Operations	☑	☑
PeopleSoft University	Business Adm Student Staff	☑	☑
PeopleSoft University	Graduate Business Admissions	☑	☑
PeopleSoft University	Development Acknowl Coord	☑	☑
PeopleSoft University	Development Campaign Manager	☑	☑
PeopleSoft University	Development Director	☑	☑
PeopleSoft University	Development Event	☑	☑

User 3C Groups Summary page

You can see only those items associated with the 3C groups to which you have access, as indicated by the indicator boxes selected. You can temporarily turn off access to specific 3C groups that you do not want to view each time. Clear the Inquiry Indicator check box for those groups that you do not want to include in your default. The Update Indicator check box shows if the user can enter and edit data in the 3C group. Users cannot change update access on this page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Using the 3C Engine," Setting 3C Engine Security

CHAPTER 21

Introducing Collaborative Applications

This chapter provides an overview of the Student Administration and Contributor Relations Solutions collaborative applications, lists common elements, and reviews the home pages for each collaborative application.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offers self-service applications that are licensed separately. If you have licensed a collaborative application, you can use the self-service pages described in the PeopleBooks documentation.

Understanding Collaborative Applications

Collaborative applications bring multiple self-service transactions together into a unit. By using a collaborative application's home page, a user can access the various transactions for which they have security.

This chapter documents all the collaborative applications home pages for PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions collaborative applications.

Understanding Modifying Text for Collaborative Applications

All onscreen text and messages on the Collaborative Application pages should be considered samples. You may need to modify the onscreen text or messages to meet your institution's needs. The pages in the Collaborative Applications are set up so you can use them without modification if you choose.

Common Elements Used in This Chapter

Application/PeopleBook This heading appears in the tables under each page shot. It lists which application is associated with the self-service feature and in which PeopleBook the self-service feature is documented.

Features This heading appears in the tables under each page shot. It lists the links to self-service activities that appear under each icon.

Icon Name This heading appears in the tables under each page shot. It refers to the icon and its associated link on the home page. For each icon there is another home page. In some cases there are additional groupings on the icon home page and those are listed under Icon Name.

User This heading appears in the tables under each page shot. It indicates who the intended user is for the feature.

Reviewing the Collaborative Application Home Pages

This section introduces the home pages for these collaborative applications:

- Personal Portfolio
- Community Access
- Community Directory
- Gradebook
- Learner Services
- Learning Management
- Involvement
- Outreach

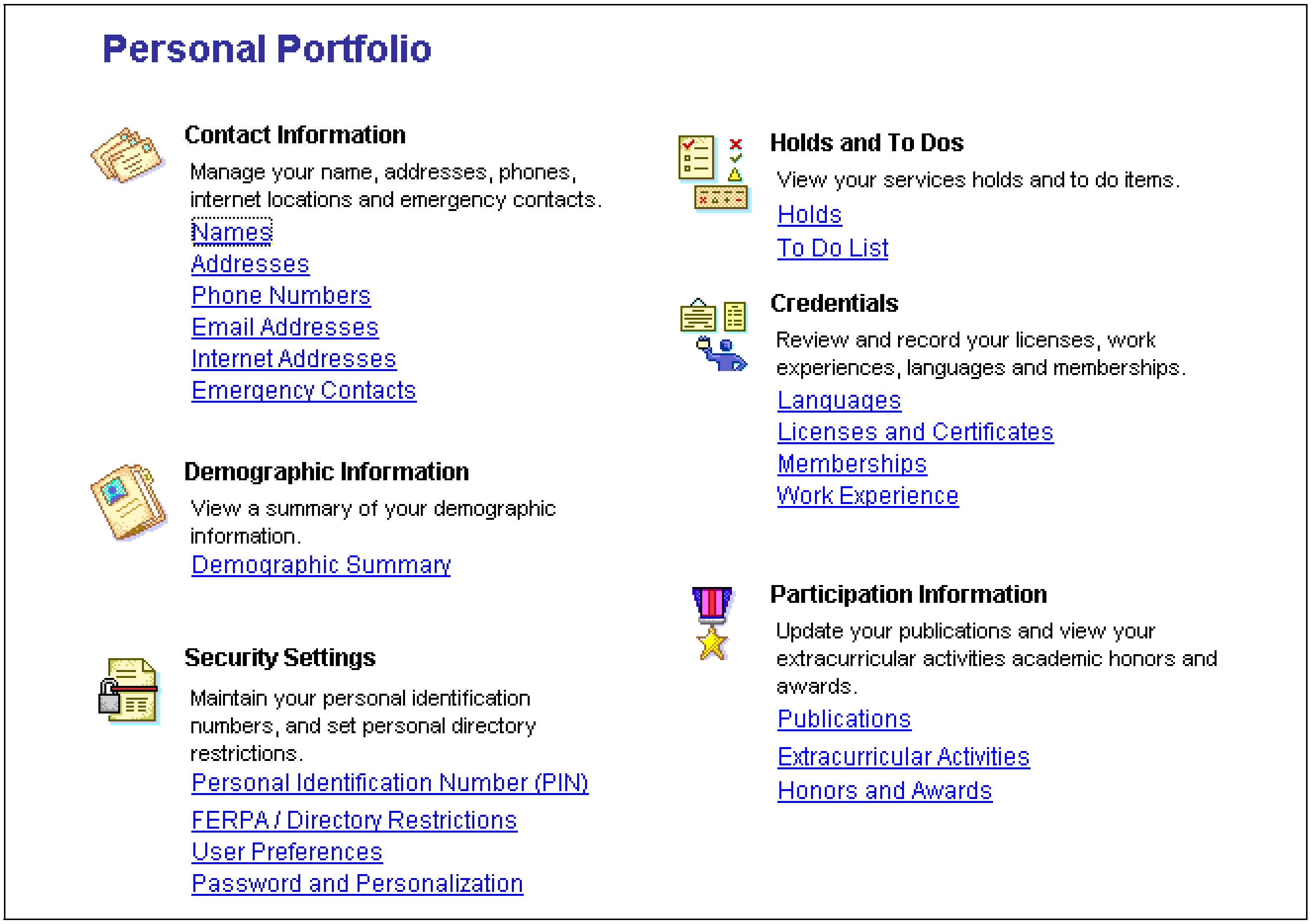
Pages Used to Review Collaborative Application Home Pages

Page Name	Object Name	Navigation	Usage
Personal Portfolio	CC_PORTFOLIO	SA Self Service, Personal Portfolio, Home, Personal Portfolio, Personal Portfolio	Students, alumni, faculty and anyone you want to give access to can use this home page to access the self-service activities included with this collaborative application.
Community Access	CA_HOME	SA Self Service, Community Access, Home, Community Access, Community Access	Visitors and users with self-service access can use this home page to access the self-service activities included with this collaborative application. This page is designed as a 'gateway' to features that can be available to users regardless of role.
Gradebook (for instructors)	LAM_GRADEBK_INSTR	SA Self Service, Gradebook, Home, Gradebook, Gradebook	Instructors can use this home page to access the self-service activities for instructors included with this collaborative application.
Gradebook (for students)	LAM_GRADEBK_STDNT	SA Self Service, Gradebook, Home, Gradebook, Gradebook	Students can use the Gradebook for Students home page to access the self-service activities for students included with this collaborative application.

Page Name	Object Name	Navigation	Usage
Learner Services	LRN_SRV_HOME	SA Self Service, Learner Services, Home, Learner Services, Learner Services	Students and applicants can use this home page to access the self-service activities included with this collaborative application.
Learning Management	LEARNING_MGMT_HOME	SA Self Service, Learning Management, Home, Learning Management, Learning Management	Instructors, advisors, and administrators can use this home page to access the self-service activities included with this collaborative application.
Involvement	INVOLVEMENT_HOME	CR Self Service, Involvement, Home, Involvement, Involvement	Contributors can use this home page to access the self-service activities included with this collaborative application. Involvement is part of PeopleSoft Contributor Relations Solutions.
Outreach Home Page	AV_OUTREACH_HOME	Outreach, Outreach Officer, Home, Outreach, Outreach Home Page	Outreach officers use this page to access the self-service activities included with this collaborative application.
Recruiting Home Page	AD_OUTREACH_HOME	Outreach, Recruiting Officer, Home, Recruiting, Recruiting Home Page	Admissions recruiting officers use this page to access the self-service activities included with this collaborative application.

Viewing Personal Portfolio Home Page

Access the Personal Portfolio page.



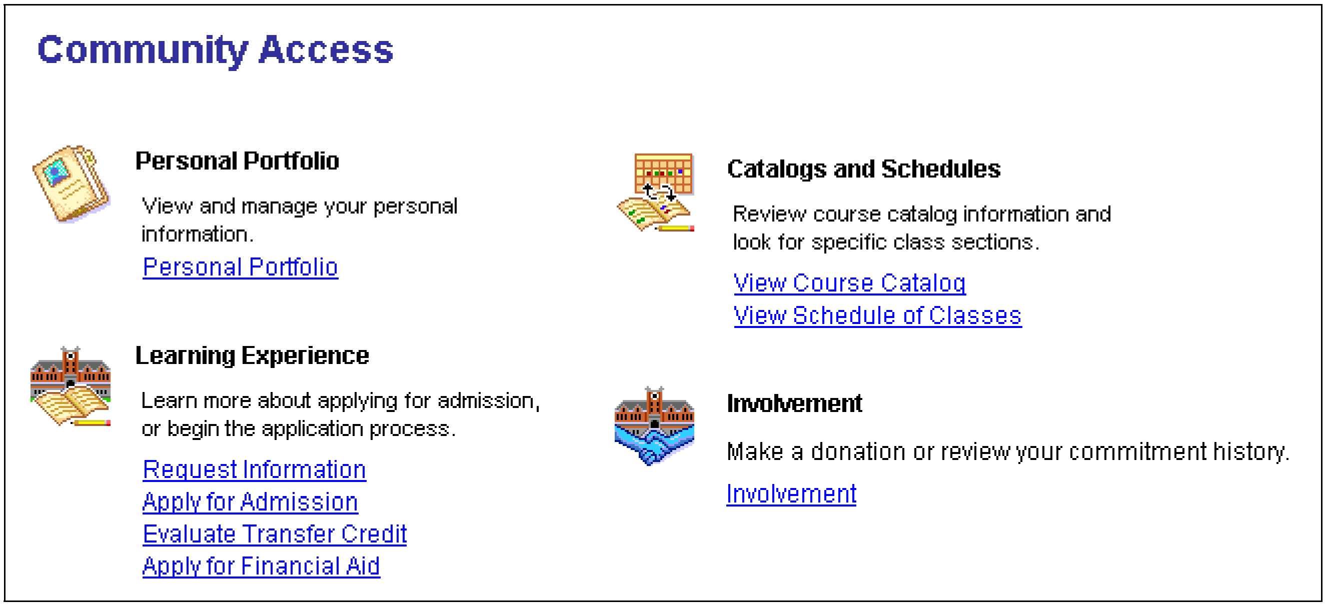
Personal Portfolio page

Icon Name	Features	User	Application /PeopleBook
Contact Information	Names	Anyone with Access	Campus Community
	Addresses	Anyone with Access	Campus Community
	Phone Numbers	Anyone with Access	Campus Community
	Email Addresses	Anyone with Access	Campus Community
	Internet Addresses	Anyone with Access	Campus Community
	Emergency Contacts	Anyone with Access	Campus Community
Demographic Information	Demographic Summary	Anyone with Access	Campus Community

Icon Name	Features	User	Application /PeopleBook
Security Settings	Personal Identification Number (PIN)	Anyone with Access	Campus Community
	FERPA/Directory Restrictions	Anyone with Access	Campus Community
	User Preferences	Anyone with Access	Campus Community
	Password and Personalization	Anyone with Access	Campus Community
Holds and To Dos	Holds	Anyone with Access	Campus Community
	To Do List	Anyone with Access	Campus Community
Credentials	Languages	Anyone with Access	Campus Community
	Licenses and Certificates	Anyone with Access	Campus Community
	Memberships	Anyone with Access	Campus Community
	Work Experience	Anyone with Access	Campus Community
Participation Information	Publications	Anyone with Access	Campus Community
	Extracurricular Activities	Anyone with Access	Campus Community
	Honors and Awards	Anyone with Access	Campus Community

Viewing Community Access Home Page

Access the Community Access page.



Community Access page

Icon Name	Features	User	Application /PeopleBook
Personal Portfolio	Personal Portfolio	Many	Campus Community
Learning Experience	Request [admissions] Information	Prospect/Applicant	Recruiting and Admissions
	Apply for Admission	Prospect/Applicant	Recruiting and Admissions
	Evaluate Transfer Credit	Prospect/Applicant	Student Records and Academic Advisement
	Apply for Financial Aid	Prospect/Applicant	Links directly to the FAFSA website.
Catalogs and Schedules	View Course Catalog	Prospect/Applicant	Student Records
	View Schedule of Classes	Prospect/Applicant	Student Records
Involvement	Involvement	Contributor	Contributor Relations Solutions

Introducing Community Directory

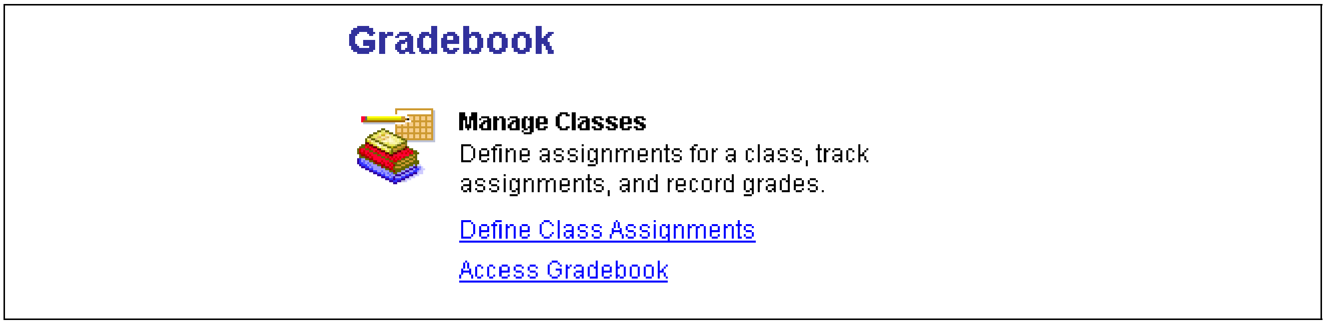
The Community Directory collaborative application enables users to search the database for individuals in the system and pull up their basic contact information, such as address, phone number, and email. This collaborative application does not have a home page.

The Community Directory is fully documented in *PeopleSoft Campus Community Fundamentals PeopleBook.*

Viewing Gradebook Home Page for Instructors

Access the Gradebook (for instructors) page.

Instructors and students use the Gradebook collaborative application. Instructors and students use different home pages to access Gradebook because there are features specific to each group of users.



Gradebook (for Instructors) page

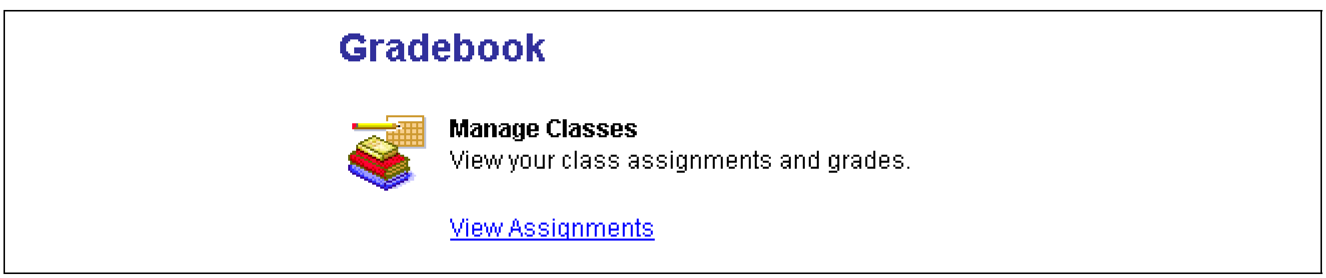
See Also

PeopleSoft Student Administration Gradebook PeopleBook

Viewing Gradebook Home Page for Students

Access the Gradebook (for students) page.

Instructors and students use the Gradebook collaborative application. Instructors and students use different home pages to access Gradebook because there are features specific to each group of users.



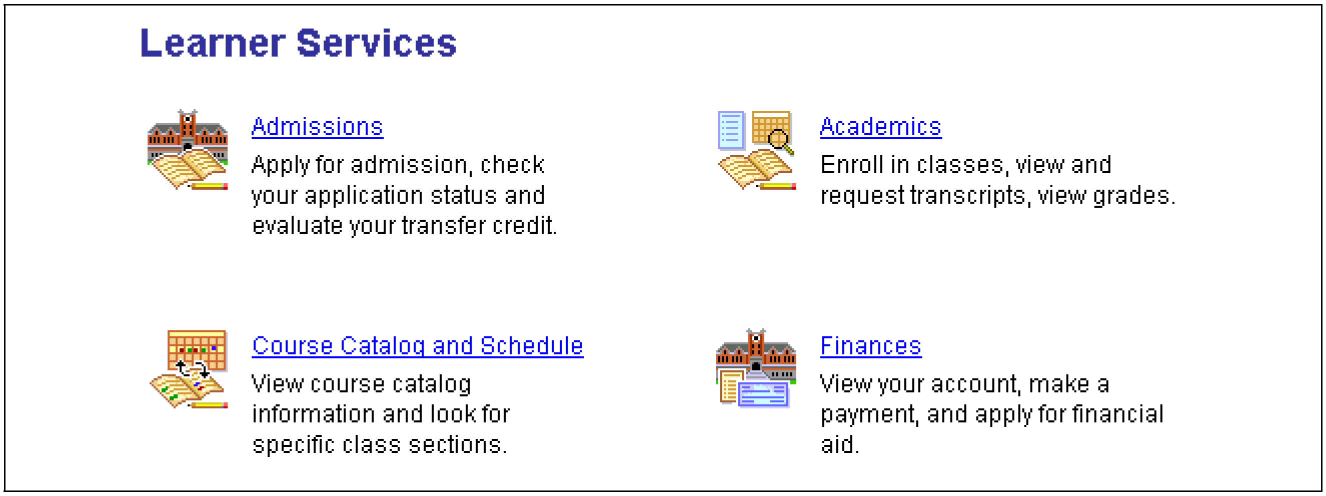
Gradebook (for students) page

See Also

PeopleSoft Student Administration Gradebook PeopleBook

Viewing Learner Services Home Page

Access the Learner Services page.



Learner Services page

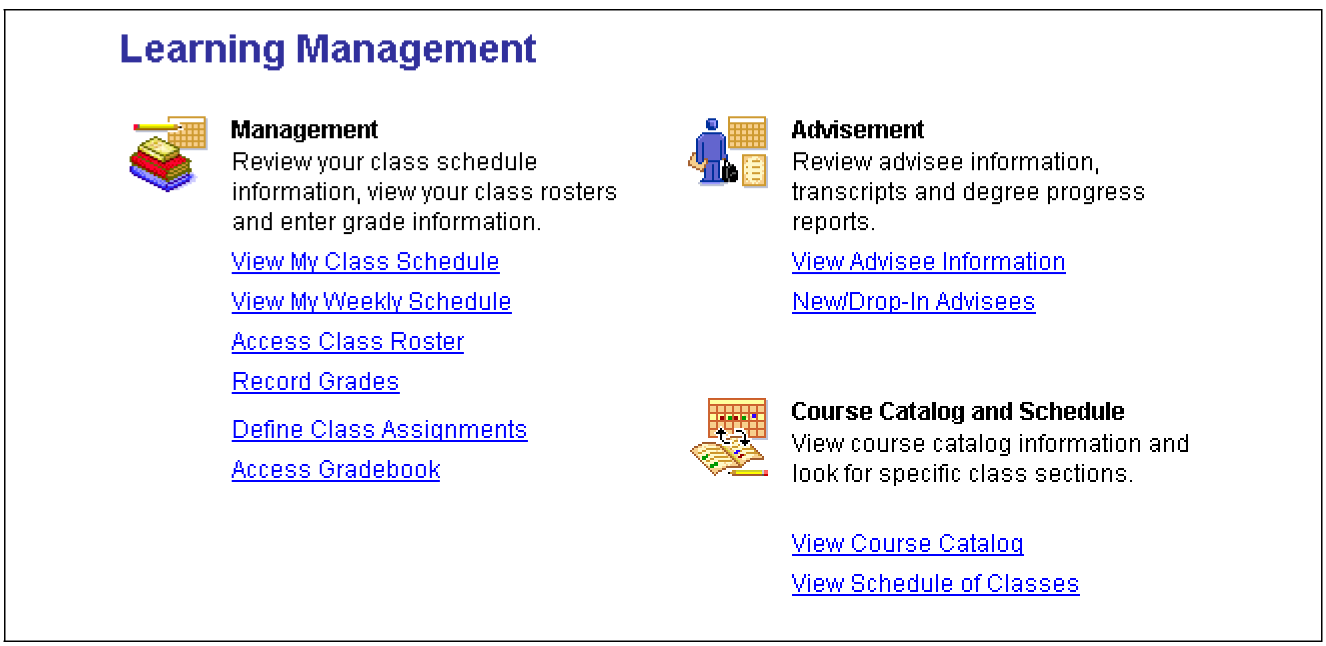
Icon Name	Features	User	Application /PeopleBook
Admissions	Request [admissions] Information	Prospect/Applicant	Recruiting and Admissions
	Apply for Admission	Prospect/Applicant	Recruiting and Admissions
	View Application Status	Applicant	Recruiting and Admissions
	Accept/Decline Admission	Applicant	Recruiting and Admissions
	Evaluate Transfer Credit	Prospect/Applicant	Student Records and Academic Advisement
	View Course Catalog	Prospect/Applicant	Student Records
	View Schedule of Classes	Prospect/Applicant	Student Records
Course Catalog and Schedule	View Course Catalog	Prospect/Applicant /Student	Student Records
	View Schedule of Classes	Prospect/Applicant /Student	Student Records
Academics – Enrollment	View Enrollment Appointment	Student	Student Records

Icon Name	Features	User	Application /PeopleBook
	Enroll in a Class	Student	Student Records
	View My Class Schedule	Student	Student Records
	View My Weekly Schedule	Student	Student Records
	View My Exam Schedule	Student	Student Records
Academics – Course Catalog and Schedule	View Course Catalog	Student	Student Records
	View Schedule of Classes	Student	Student Records
Academics – Academic Record	View My Grades	Student	Student Records
	View My Assignments	Student	Student Records
	Request Official Transcript	Student	Student Records
	View Unofficial Transcript	Student	Student Records
	View Degree Progress Report	Student	Academic Advisement
	View Transfer Credit Report	Student	Student Records
	Evaluate Transfer Credit	Student	Student Records and Academic Advisement
	View My Advisors	Student	Student Records
	Request Enrollment Verification	Student	Student Records
	Apply for Graduation	Student	Student Records

Icon Name	Features	User	Application /PeopleBook
Finances – Account	Account Summary	Student/Applicant	Student Financials
	Make a Payment	Student/Applicant	Student Financials
	Total Due Charges	Student/Applicant	Student Financials
Finances – Financial Aid	FAFSA on the Web	Student/Applicant	Links directly to the FAFSA website.
	Financial Aid Awards	Student/Applicant	Financial Aid
	NSLDS Student Access Website	Student/Applicant	Links directly to the NSLDS website.

Viewing Learning Management Home Page

Access the Learning Management page.

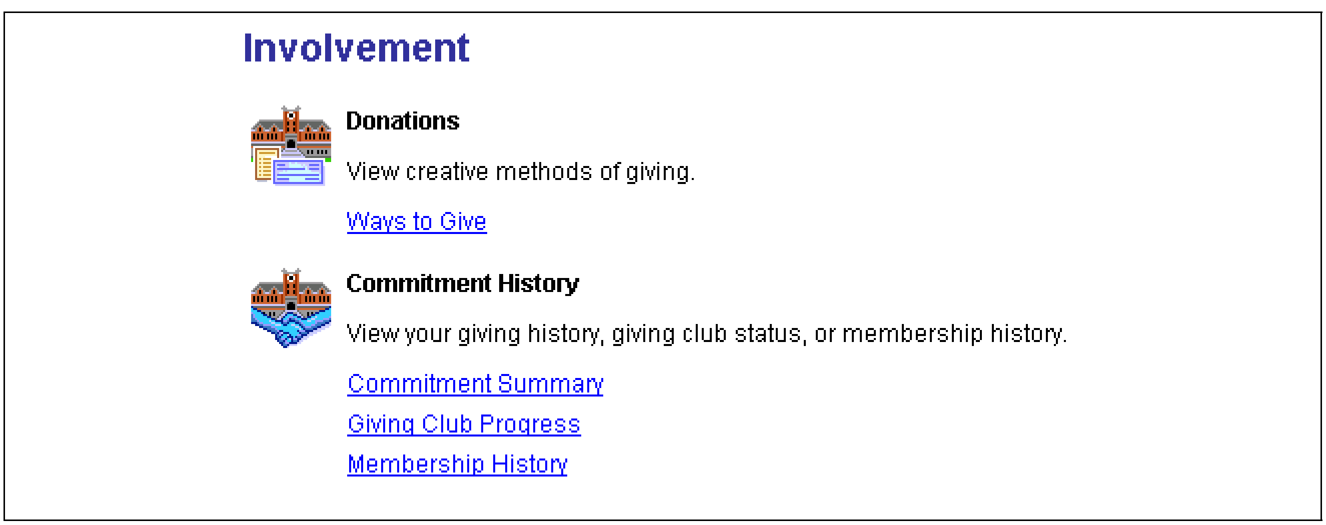


Learning Management page

Icon Name	Features	User	Application /PeopleBook
Management	View My Class Schedule	Instructor	Student Records
	View My Weekly Schedule	Instructor	Student Records
	Access Class Roster	Instructor	Student Records
	Record Grades	Instructor	Student Records
	Define Class Assignments	Instructor	Gradebook
	Access Gradebook	Instructor	Gradebook
Advisement	View Advisee Information	Advisor	Student Records
	New/Drop-In Advisees	Advisor	Student Records
Course Catalog and Schedule	View Course Catalog	Instructor, Advisor, Administrator	Student Records
	View Schedule of Classes	Instructor, Advisor, Administrator	Student Records

Viewing Involvement Home Page

Access the Involvement page.

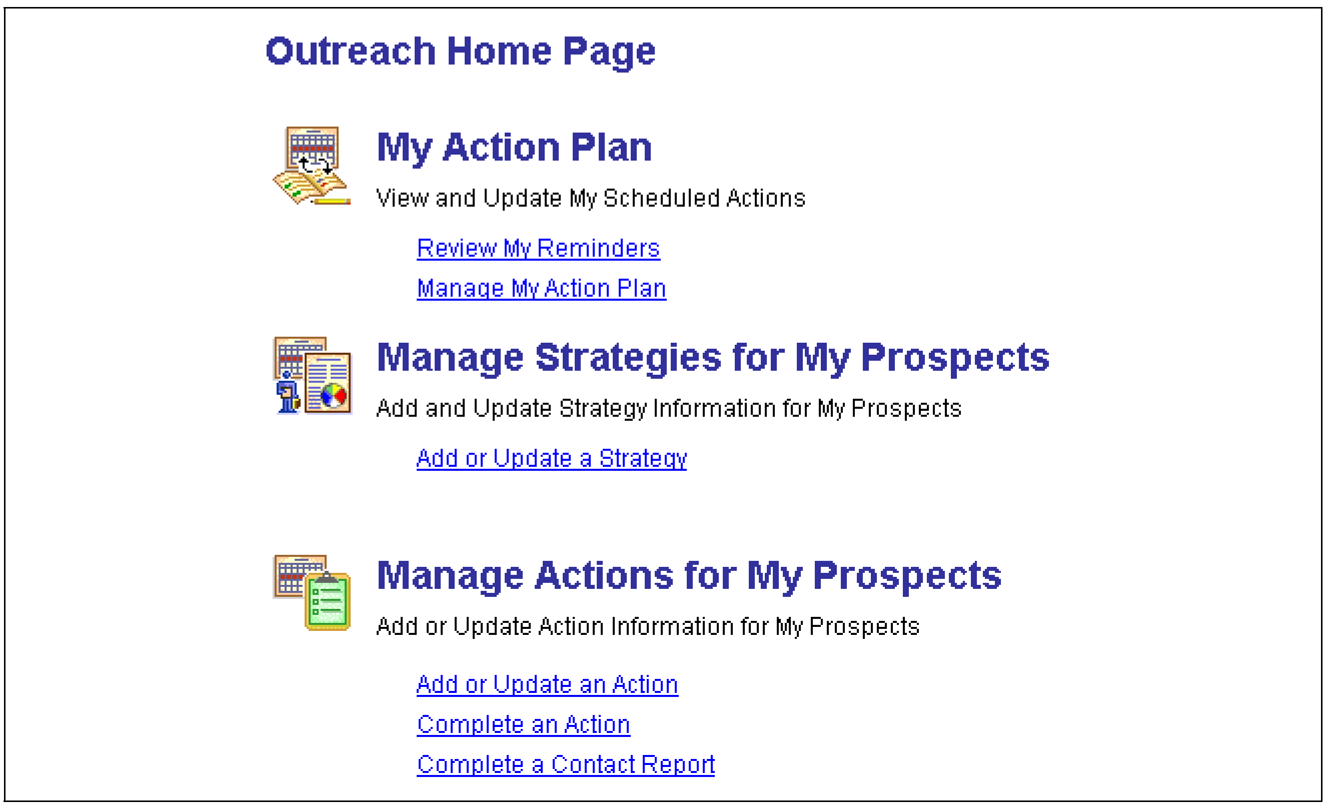


Involvement page

Icon Name	Features	User	Application /PeopleBook
Donations	Ways to Give	Contributor	Contributor Relations Solutions
Commitment History	Commitment Summary	Contributor	Contributor Relations Solutions
	Giving Club Progress	Contributor	Contributor Relations Solutions
	Membership History	Contributor	Contributor Relations Solutions

Viewing Outreach Home Page

Access the Outreach Home Page.



Outreach Home Page

Icon Name	Features	User	Application /PeopleBook
My Action Plan	Review My Reminders	Outreach Officer	Contributor Relations Solutions
	Manage My Action Plan	Outreach Officer	Contributor Relations Solutions
Manage Strategies for My Prospects	Add or Update a Strategy	Outreach Officer	Contributor Relations Solutions
Manage Actions for My Prospects	Add or Update an Action	Outreach Officer	Contributor Relations Solutions
	Complete an Action	Outreach Officer	Contributor Relations Solutions
	Complete a Contact Report	Outreach Officer	Contributor Relations Solutions

Viewing Recruiting Home Page

Access the Recruiting Home Page.

Recruiting Home Page

Icon Name	Features	User	Application /PeopleBook
View Prospects	By Category	Admissions Recruiter	Recruiting and Admissions
	By Organization	Admissions Recruiter	Recruiting and Admissions
	By Region	Admissions Recruiter	Recruiting and Admissions
View Applicants	By Category	Admissions Recruiter	Recruiting and Admissions
	By Organization	Admissions Recruiter	Recruiting and Admissions
	By Region	Admissions Recruiter	Recruiting and Admissions

APPENDIX A

PeopleSoft Application Fundamentals Reports

This appendix provides an overview of the reports included in the Application Fundamentals for Student Administration and Contributor Relations Solutions and enables you to:

- View summary tables of all reports.
- View report details and tables accessed for selected reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook, "Process Scheduler"

PeopleSoft Application Fundamentals Reports: A to Z

These tables list the reports associated with processes described in the PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook. The reports listed are Crystal and SQR reports and are sorted by Report ID.

This section discusses:

- General installation reports.
- Student Financials security reports.
- Academic institution and PeopleSoft Student Records setup reports.

See Also

Appendix A, "PeopleSoft Application Fundamentals Reports," PeopleSoft Application Fundamentals Reports: Selected Reports, page 304

General Installation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CCDATADC Data Dictionary – Student Administration	Lists, alphabetically by field name, all fields in PeopleSoft Student Administration Solutions, including the description, type, size, and format of each field.	Design Student Administration, Define Student Administration, Report A-F, Data Dictionary	PRCSRUNCNTL
Per702 Installation Table	Lists the information that you defined in the Installation Table component.	Define Business Rules, Define General Options, Report, Installation Table	PRCSRUNCNTL
Per708 Country Table	Lists the country description and address formats that you defined in the Country Table component.	Define Business Rules, Define General Options, Report, Country Table	PRCSRUNCNTL

PeopleSoft Student Financials Security Reports

Report ID and Report Name	Description	Navigation	Run Control Page
SF800 Business Unit Permission List	Lists the business units that you associated with each permission list on the Perm List – Business Unit page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, Business Unit	PRCSRUNCNTL_SF
SF801 Business Unit User ID	Lists the business units that you associated with each user ID on the User ID – Business Unit page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, Business Unit	PRCSRUNCNTL_SF
SF802 Cashier's Office Permission List	Lists the cashier offices for each business unit that you associated with a permission list on the Perm List – Business Unit page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, Cashier Office	PRCSRUNCNTL_SF
SF803 Cashier's Office User ID	Lists the cashier offices for each business unit that you associated with each user ID on the User ID – Business Unit page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, Cashier Office	PRCSRUNCNTL_SF
SF804 Credit Card Permission List	Lists the permission lists you gave access to view the entire credit card number on the Perm List – Credit Card page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, Credit Card	PRCSRUNCNTL_SF

Report ID and Report Name	Description	Navigation	Run Control Page
SF805 Credit Card User ID	Lists the user IDs you gave access to view the entire credit card number on the User ID – Credit Card page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, Credit Card	PRCSRUNCNTL_SF
SF806 Company Permission List	Lists the companies that you associated with each permission list on the Perm List – Company page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, Company	PRCSRUNCNTL_SF
SF807 Company User ID	Lists the companies that you associated with each user ID on the User ID – Company page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, Company	PRCSRUNCNTL_SF
SF808 General Setup	Lists the Security Views defined and then lists the Security Options that you defined for Student Financials Security.	Design Student Administration, Secure Student Financials, Process, General Setup Report.	PRCSRUNCNTL_SF
SF809 Item Type Permission List	Lists the item types and item type tree nodes that you associated with each permission list on the Perm List – Item Type page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, Item Type	PRCSRUNCNTL_SF
SF810 Item Type User ID	Lists the item types that you associated with each user ID on the User ID – Item Type page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, Item Type	PRCSRUNCNTL_SF
SF811 SetID Permission List	Lists the set IDs that you associated with each permission list on the Perm List – SetID page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt Perm, SetID.	PRCSRUNCNTL_SF
SF812 SetID User ID	Lists the set IDs that you associated with each user ID on the User ID – SetID page in Student Financials Security.	Design Student Administration, Secure Student Financials, Rpt User, SetID	PRCSRUNCNTL_SF

Academic Institution and PeopleSoft Student Records Setup Reports

Report ID and Report Name	Description	Navigation	Run Control Page
SR701 Institution Table	Lists all academic institutions, including detailed information about each academic institution. This report references fields as defined on the Academic Institution 1 page and the Academic Institution 2 page.	Design Student Administration, Design Academic Structure, Report, Institution Tbl	PRCSRUNCNTL
SR702 CIP Report	Lists all of the defined CIP codes in PeopleSoft Student Administration Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the CIP Code Table (Classification of Instructional Programs code table) page.	Design Student Administration, Design Academic Structure, Report, CIP Table	PRCSRUNCNTL
SR703 Hegis Code Report	Lists all of the defined HEGIS codes in PeopleSoft Student Administration Solutions, including the effective date, description and formal description of each code. This report references fields as defined on the HEGIS Code Table page.	Design Student Administration, Design Academic Structure, Report, HEGIS Code Tbl	PRCSRUNCNTL
SR722 Time Period Report	Lists all defined time periods in PeopleSoft Student Administration Solutions, including setID, academic career, time period code, description, and short description. This report references fields as defined on the Time Period Table page.	Design Student Administration, Define Student Administration, Report, Time Period Tbl	PRCSRUNCNTL
SR723 Academic Career Report	Lists, by academic institution, the academic careers within an academic institution, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Design Student Administration, Design Academic Structure, Report, Academic Career Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR723a Academic Career Pointers Report	Lists, by academic institution, the academic careers within each academic career, including detail about each academic career. This report references fields as defined on the Academic Career Table component.	Design Student Administration, Design Academic Structure, Report, Academic Career Pointers	PRCSRUNCNTL
SR724 Academic Organization Report	Lists alphabetically the defined academic organizations in PeopleSoft Student Administration Solutions, including details about each academic organization. This report references fields as defined on the Academic Organization Table page.	Design Student Administration, Design Academic Structure, Report, Academic Organization Tbl	PRCSRUNCNTL
SR724a Academic Organization FS Owner Report	Lists alphabetically the defined academic organizations in PeopleSoft Student Administration Solutions, including details about each academic organization and the financial support owners. This report references fields as defined on the Academic Organization FS Owner (academic organization financial support owner) page.	Design Student Administration, Design Academic Structure, Report, Acad Organization FS Owner	PRCSRUNCNTL
SR724b Academic Organization HR Owner Report	Lists alphabetically the defined academic organizations in PeopleSoft Student Administration Solutions, including details about each academic organization and the human resources owners. This report references fields as defined on the Academic Organization HR Owner (academic organization human resources owner) page.	Design Student Administration, Design Academic Structure, Report, Acad Organization HR Owner	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR725 Academic Group Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report references fields as defined on the Academic Group Table page.	Design Student Administration, Design Academic Structure, Report, Academic Group Tbl	PRCSRUNCNTL
SR725a Course Career Catalog Nbr Range Report	Lists, by academic institution, the academic groups within an academic institution, including the effective date, description, short description, student specific permissions, and auto enroll from wait list. This report also includes the academic careers and catalog number contained within each academic group. This report references fields as defined on the Academic Group Table page and the Academic Career Level Table page.	Design Student Administration, Design Academic Structure, Report, Academic Career Level Tbl	PRCSRUNCNTL
SR726 Subject Report	Lists, by academic institution, the subject areas within an academic institution, including the effective date, description, short description, formal description, academic organization, split ownership, and external subject area. This report references fields as defined on the Academic Subject Table page.	Design Student Administration, Design Academic Structure, Report, Subject Tbl	PRCSRUNCNTL
SR726a Subject Owner Report	Lists, by academic institution, the subject areas within an academic institution, including detail about the subject areas, and the academic organizations that own the subject areas through split ownership. This report references fields as defined on the Academic Subject Table page.	Design Student Administration, Design Academic Structure, Report, Subject Owner Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR728a Term and Session Report	Lists all the defined terms and sessions in PeopleSoft Student Administration Solutions, including detailed information about each term and session. This report references fields as defined on the Term Table page and the Session Table page.	Design Student Administration, Design Academic Structure, Report, Term and Sessions	PRCSRUNCNTL
SR729 Academic Calendar Report	Lists all the defined academic calendars in PeopleSoft Student Administration Solutions, with detailed information about each. This report references fields as defined on the Term Calendar 1 page of the Academic Calendar component.	Design Student Administration, Design Academic Structure, Report, Academic Calendar Tbl	PRCSRUNCNTL
SR729a Academic Calendar Term Report	Lists all terms with defined academic calendars in PeopleSoft Student Administration Solutions, with detailed information about each term's academic calendar. This report references fields as defined on the following pages of the Academic Calendar component: Term Calendar 1, Term Calendar 2, Term Calendar 3.	Design Student Administration, Design Academic Structure, Report, Academic Cal Term Tbl	PRCSRUNCNTL
SR729b Academic Calendar Session Report	Lists all sessions with defined academic calendars in PeopleSoft Student Administration Solutions, with detailed information about each session's academic calendar. This report references fields as defined on the following pages of the Academic Calendar component: Session Calendar 1, Session Calendar 2.	Design Student Administration, Design Academic Structure, Report, Academic Cal Session Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR730 Academic Program Report	Lists all defined academic programs in PeopleSoft Student Administration Solutions, including detailed information about each academic program. This report references fields as defined on the following pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Design Student Administration, Design Academic Structure, Report, Academic Program Tbl	PRCSRUNCNTL
SR730a Academic Program Owner Report	Lists all defined academic programs in PeopleSoft Student Administration Solutions, including detailed information about each academic program and detailed information about academic organization ownership. This report references fields as defined on the following pages of the Academic Program Table component: Program 1, Program 2, Taxonomy.	Design Student Administration, Design Academic Structure, Report, Academic Program Owner	PRCSRUNCNTL
SR730b Home Campus Report	Lists all defined academic programs in your system, including detailed information about each academic institution and information about campuses linked to each academic institution. This report references fields as defined on the following pages of the Academic Program Table component: Program 1, Program 2, Owner, Taxonomy, Campus.	Design Student Administration, Design Academic Structure, Report, Home Campus Tbl	PRCSRUNCNTL
SR731 Academic Plan Report	Lists all defined academic plans in PeopleSoft Student Administration Solutions, including detailed information about each academic plan. This report references fields as defined on the following pages of the Academic Plan Table component: Academic Plan Table, Academic Plan Print Options, Academic Plan Taxonomy.	Design Student Administration, Design Academic Structure, Report, Academic Plan Tbl	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR731a Academic Plan Owner Report	Lists all defined academic plans in PeopleSoft Student Administration Solutions, including detailed information about each academic plan and about academic organization ownership. This report references fields as defined on all pages of the Academic Plan Table component.	Design Student Administration, Design Academic Structure, Report, Academic Plan Owner	PRCSRUNCNTL
SR732 Academic Sub-Plan Report	Lists all defined academic subplans in PeopleSoft Student Administration Solutions, including detailed information about each academic subplan. This report references fields as defined on the Academic Sub-Plan Table component.	Design Student Administration, Design Academic Structure, Report, Academic Sub-Plan Tbl	PRCSRUNCNTL
SR736 Campus Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, and location. This report references fields as defined on the Campus Table page.	Design Student Administration, Design Academic Structure, Report, Campus Tbl	PRCSRUNCNTL
SR736a Campus Location Report	Lists, by academic institution, the campuses within an academic institution, including the effective date, description, short description, and location code. This report references fields as defined on the Campus Table page.	Design Student Administration, Design Academic Structure, Report, Campus Location Tbl	PRCSRUNCNTL
SR738 Career Pointer Exception Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description. This report references fields as defined on the Career Pointer Exception Rule page.	Design Student Administration, Design Academic Structure, Report, Career Pointer Exception	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
SR738a Career Pointer Exception Detail Report	Lists, by academic institution, the career pointer exception rules, including the effective date, description, and short description, and rule details about requested courses. This report references fields as defined on the Career Pointer Exception Rule page.	Design Student Administration, Design Academic Structure, Report, Career Pointer Exception Detail	PRCSRUNCNTL
SRSECVWU SA Security View Update report	Lists current component security setup data for your institution. Details such as component name, security level, and Add Search record settings are listed on the report. Use this report to get a complete snapshot of the security views data set up at your institution.	Design Student Administration, Secure Student Administration, Process, Security Views Update	RUNCTL_SRSECVWU

PeopleSoft Application Fundamentals Reports: Selected Reports

This section provides detailed information on individual reports including important fields and tables accessed. The reports are listed alphabetically by report ID.

SRSECVWU - Security Views

COMPONENT Displays the name of the component name as entered on the Security Views page.

GLOBAL Displays the status of the Global Security check box on the Security Views page. *Yes* indicates a status of selected, *No* indicates a status of cleared.

MENUNAME When the Global Security option is set to *NO,* or cleared, this column displays the specific menu name, as entered on the Security Views page.

BARNAME When the Global Security option is set to *NO,* or cleared, this column displays the specific bar name, as entered on the Security page.

SECURITY LEVEL Displays the value entered in the Security field on the Security Views page. Options include: *None, Institution, Career, Program,* and *Plan.*

SEARCH RECORD Displays the search record for the component. This value is not specified on the Security Views page. The search record is specified in PeopleSoft Application Designer on the Properties page for the component.

ADD SRCH REC (add search record)	Displays the Add searchrecord (if any) for the component. This value is not specified on the Security Views page. The Add searchrecord is specified in Application Designer on the Properties page for the component. A value of *N/A* indicates that the component has no add search record.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
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 entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
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 anotherand 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.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
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.

application agent An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

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.

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 event 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).

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.

category In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

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.

child In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

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.*

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.

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.

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.

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.

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 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.

corporate account Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.

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.

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 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.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values 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 job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
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.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect 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.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
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.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
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.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
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.
key	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.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See *activity.*
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
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.

level	A section of a tree that organizes groups of nodes.
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.
load	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
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 addressesfor 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 locationindicated by a *1*is the address you use most often and may be different from the main address.
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.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific 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	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage 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.

parent node A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

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 *participant object.*

payout In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an 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.

per seat cost In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

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 contextif 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 section In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

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.

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.
private view	A user-defined view that is available only to the user who created it.
process	See *Batch Processes.*
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 an SQR, a COBOL 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 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.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
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.*
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.

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.

results management process In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

routing Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

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.

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.

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.

self-service application Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session 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 activitycharacteristics 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.

sibling A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

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 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.

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.

SQR See *Structured Query Report (SQR).*

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.

Structured Query Report (SQR) A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

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 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.

table The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing Specifies control table data for each business unit so that redundancy is eliminated.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

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.

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.

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 loading process In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

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.

transaction type In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

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.

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.

uniform resource locator (URL) In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

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.

URL
See *uniform resource locator (URL).*

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.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

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.

workflow
The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

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.

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.

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