
PeopleSoft Recruiting and Admissions 9.0 PeopleBook

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PeopleSoft Recruiting and Admissions Preface

This preface discusses:

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

PeopleSoft Products

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

PeopleSoft Campus Solutions Fundamentals

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation called *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook* and *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Campus Solutions operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "PeopleSoft Campus Community Preface,"
PeopleSoft Campus Solutions Application Fundamentals

PeopleBook Structure

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

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

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

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

<i>Chapters</i>	<i>Description</i>
Preface	This is the chapter you're reading now. It explains: • How to use the PeopleSoft Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

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

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Recruiting and Admissions

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

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

Recruiting and Admissions Overview

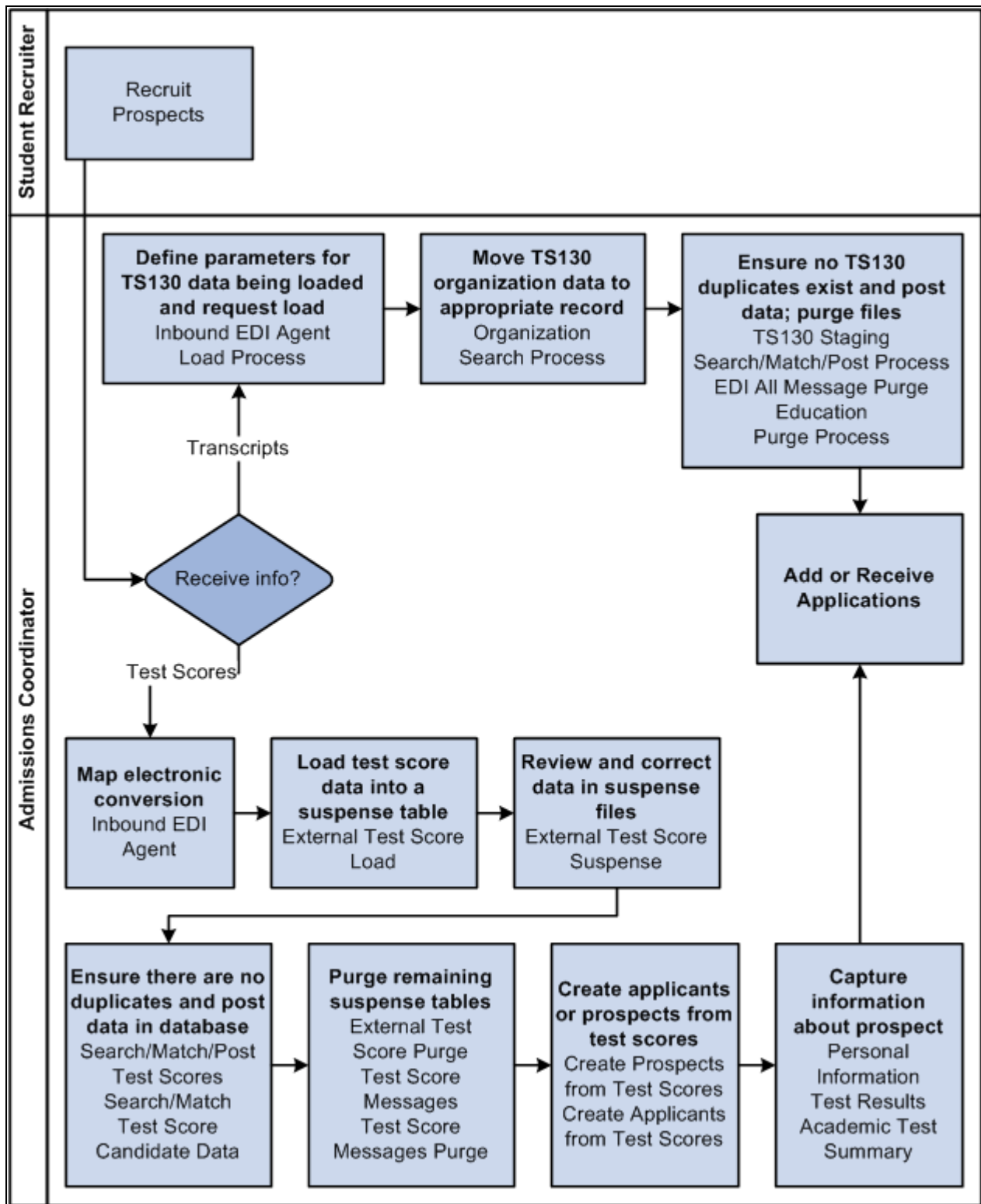
Recruiting and Admissions helps you plan, manage, and track admissions and recruitment activities.

With this application, you can:

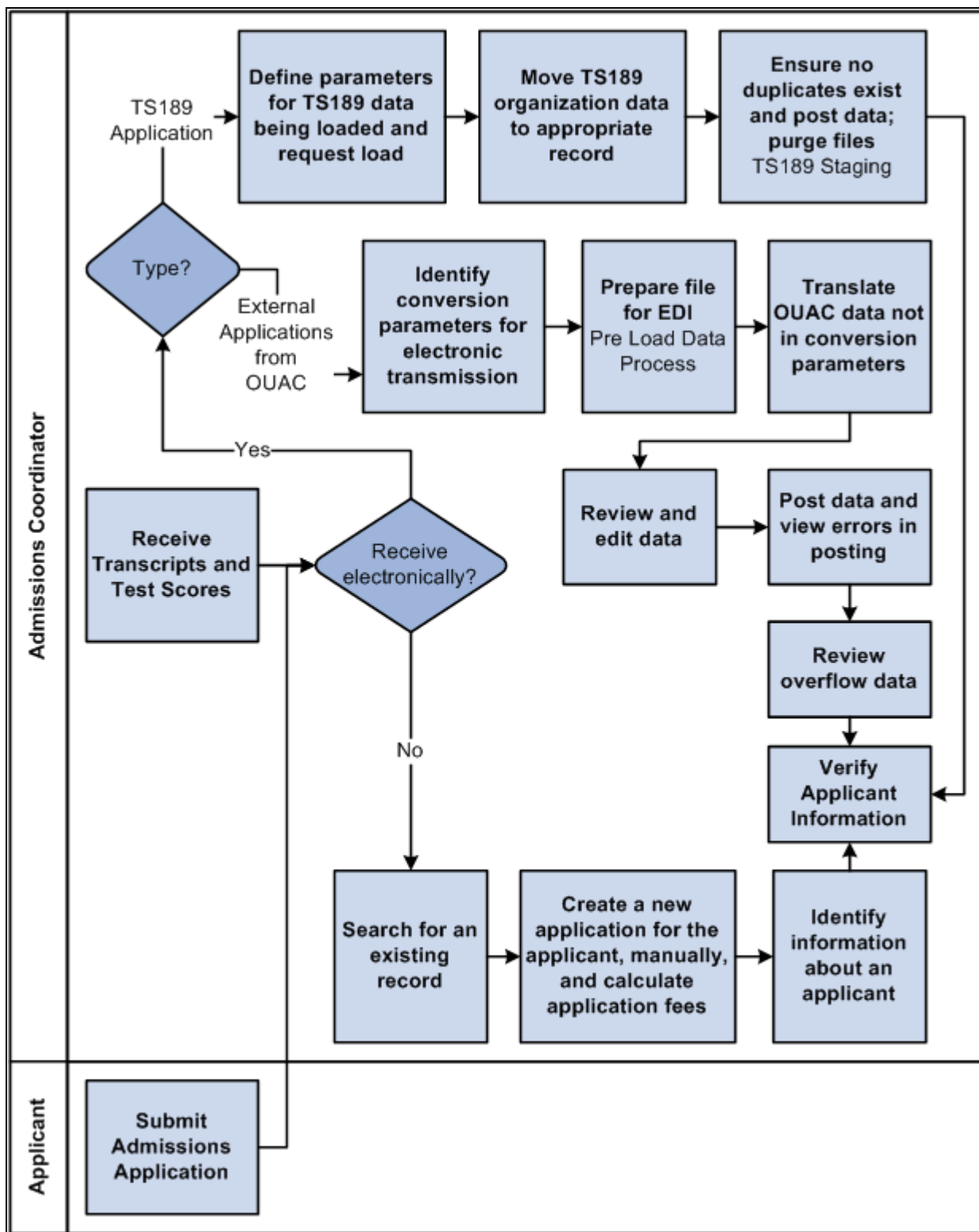
- Capture student recruiting information and analyze recruiting activities.
- Tailor your admissions system according to your requirements and practices.
- Set enrollment targets, track progress toward recruiting efforts, and analyze admissions decisions and patterns.

Recruiting and Admissions Business Processes

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



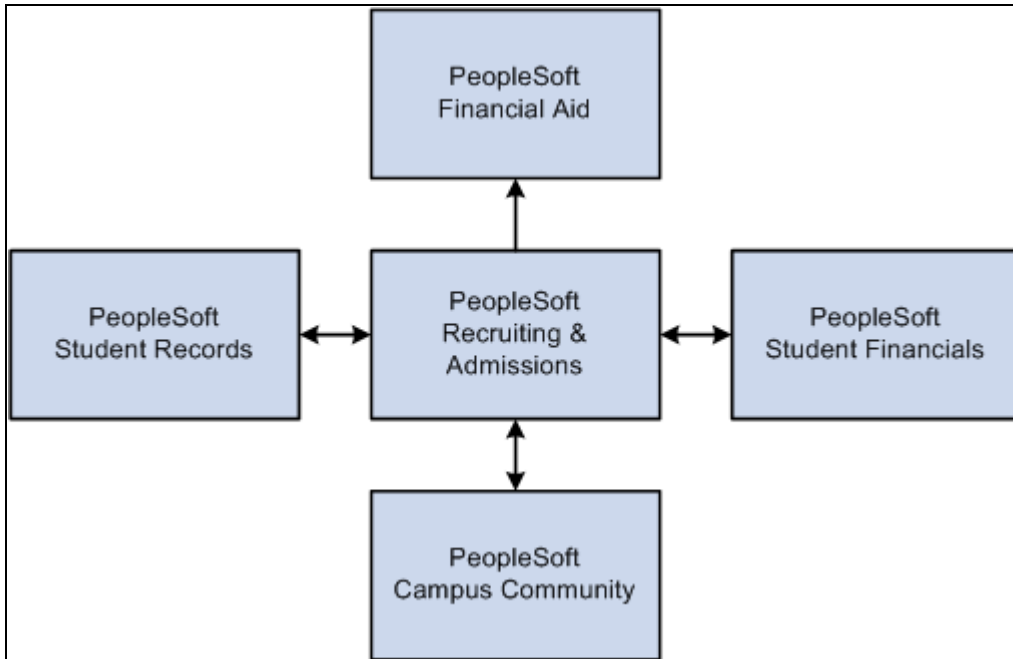
Receive transcripts and test scores business process



Add or receive applications business process

Recruiting and Admission Integrations

Recruiting and Admissions integrates with these PeopleSoft applications:



PeopleSoft Recruiting and Admissions integrations

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

Supplemental information about third-party application integrations is located on My Oracle Support.

PeopleSoft Campus Community

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

PeopleSoft Student Financials

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

PeopleSoft Student Records

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

Recruiting and Admissions Implementation

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

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

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

Component	Component Interface	References
CRS_MAJOR_CODE	SAD_CRS_MAJOR_CODE	See Chapter 8, "Setting Up External Test Score Loads," <u>Defining and Reviewing External Data Setup Tables</u> , page 67.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines.

See Also

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

PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Building Your Recruiting Structure

This chapter discusses how to:

- Set up your recruiting structure.
- Define recruiters.

Setting Up Your Recruiting Structure

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

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

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

- Set up region codes.
- Set up region trees.
- Activate region trees.
- Set up recruiting categories.
- Set up recruiting centers.
- Set up AAWS application fee waiver basis codes.
- Set up application processing centers.

Pages Used to Set Up Your Recruiting Structure

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

Setting Up Region Codes

Access the Region Table page (Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Region Table).

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

Setting Up Region Trees

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

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

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

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

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

Entering Regions in the Region Table Page

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

Setting Up Postal Codes on the Region Postal Code Table Page

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

For manual and batch recruiter assignment, the number of numeric digits in the postal code ranges of a region tree should be the same. For instance, if you have set up a region tree with five digit postal code ranges, such as USA94000 - USA95599, ensure that you do not define a nine digit postal code range for the same region tree.

If you have set up a region tree with five digit postal code ranges, the system uses the first five digits of the applicant's or prospect's home or school postal code.

If you have set up a region tree with nine digit postal code ranges, the system uses the nine digits of the applicant's or prospect's home or school postal code. If the applicant's or prospect's postal code consists of five digits, the system adds four zeros to the applicant's or prospect's postal code to make it nine digits for the assignment process.

If the applicant's or prospect's home or school postal code consists of a dash, the system removes the dash before comparing the postal code with the region tree's postal code ranges.

Defining a Region Tree for Recruiting and Admissions

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

To set up your region tree, select Tree Manager, Tree Manager. Search for a Tree Name of REGION. Select a delivered REGION tree. Then select the *Save As* link on the page.

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

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

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

- The All Detail Values in This Tree check box is cleared.
- The Allow Duplicate Detail Values check box is cleared.
- The Strictly Enforced option is selected.

- Enter your institution's setID and an effective date. When you click Save As, you return to the PeopleSoft Tree Manager page, with the name of your region tree. The name of your region tree is the setID plus the effective date.

Delivered Region Tree Examples

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

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

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

The screenshot displays the 'Tree Manager' interface. At the top, it shows the following details for the selected tree:

SetID:	GLAKE	Last Audit:	Valid Tree
Effective Date:	01/01/1900	Status:	Active
Tree Name:	REGION	Recruiting Regions	

Below this information are several links: [Save As](#), [Close](#), [Tree Definition](#), [Display Options](#), and [Print Format](#). A navigation bar includes 'Collapse All', 'Expand All', 'Find', and pagination controls showing 'First Page', '8 of 8', and 'Last Page'.

The tree structure is displayed as follows:

- ALL - All Regions
 - USA - United States
 - WESTCST - West Coast
 - CA - California
 - GREATLA - Greater Los Angeles
 - [USA90000 - USA93999]
 - NCAL - Northern California
 - [USA94000 - USA96199]

PeopleSoft Tree Manager displaying part of the sample GLAKE region tree

See Also

[Chapter 2, "Building Your Recruiting Structure," Setting Up Region Codes, page 9](#)

[Chapter 12, "Recruiting Prospective Students," page 115](#)

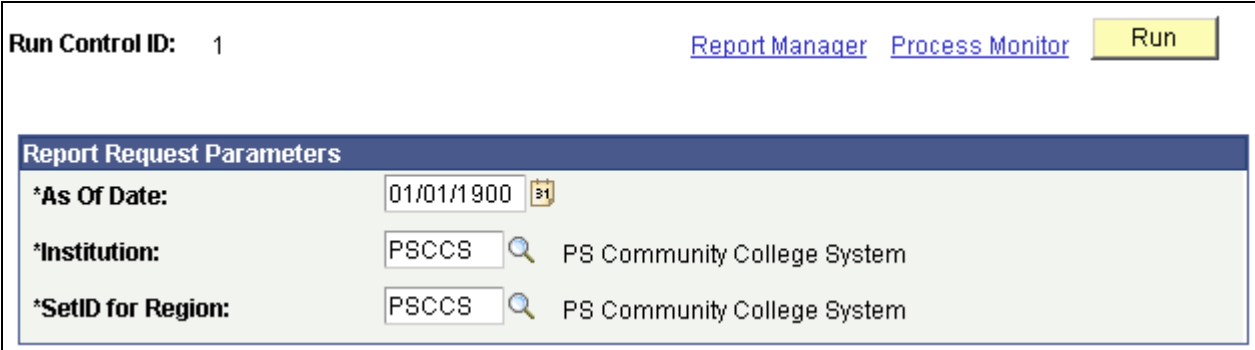
PeopleTools PeopleBook: Tree Manager

Activating Region Trees

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

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

Access the Region SetID Effdt Update page (Student Recruiting, Student Recruiters, Region SetID Effdt Update).



Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameters

*As Of Date: 01/01/1900

*Institution: PSCCS PS Community College System

*SetID for Region: PSCCS PS Community College System

Region SetID Effdt Update page

As Of Date	Enter a date equal to the effective date of the region tree.
Institution	Enter the institution for which the region tree will be used.
SetID for Region	Enter the setID that was used when creating the region tree.

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

Setting Up Recruiting Categories

Access the Recruiting Category Table page (Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Recruiting Category Table).

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

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

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

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

Move to Application	Select to copy this recruiting information to the application record when the prospect who is assigned to this category becomes an applicant.
Academic Career Indicator	Select to limit the recruiting category to one career. For example, you can create a recruiting category called <i>EXTV</i> for those prospects who are currently business executives and define it so that it is only available to your <i>BUSN</i> (graduate business) academic career. Enter the career to which you want the category limited in the Academic Career field.
Academic Career	If you want this category to be available for only <i>one</i> academic career, select the Academic Career Indicator check box and enter the career here. If you want this recruiting category to be available to <i>all</i> careers, clear the Academic Career Indicator check box and leave this field blank. This field determines the recruiting categories that appear in the Recruiting Category field on the Application Recruiters and Prospect Recruiters pages. Define academic careers on the Academic Career Table page.

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

Setting Up Recruiting Centers

Access the Recruiting Center Table page (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Recruiting Center Table).

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

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

See Also

Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 17

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Setting Up AAWS Application Fee Waiver Basis Codes

Access the Application Fee Waiver Basis page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Fee Waiver Basis).

Application Fee Waiver Basis

Academic Institution: PSUNV PeopleSoft University

Waiver Basis Code: CEEB

Find | View All

First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

+ -

*Description: The College Board Fee Waiver

Short Description: CEEB

Application Fee Waiver Basis page

Use this page to set up waiver basis codes for AAWS application fee waivers.

The values that you set up here are available for selection in the Waiver Basis Code field in the AAWS Application Fee and Waiver Processing group box on the Application Center Table page.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

Setting Up Application Processing Centers

Access the Application Center Table page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table).

Application Center Table

Academic Institution: PSUNV PeopleSoft University

Application Center: UGRD

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900  *Status: Active   

*Description: Undergraduate

Short Description: Undergrad

Academic Career: Undergraduate 

Application Fee Code: APP2  Undergraduate Application Fees

Deposit Fee Code: 

Calculate Deposit Fee in Batch: ☐

Student FTP Server ID: 

CRM FTP Server ID: 

AAWS Application Fee and Waiver Processing

Application Fee Required? ☒ Yes ☐ No

SF Merchant ID: AWTNCC  AAWS HP Credit Card

SF eCheck Merchant ID: 

When is Fee Payment Required?

☒ At Application Submission

☐ Pay Later

Allow Application Fee Waiver? ☒ Yes ☐ No

Valid Waiver Basis Codes:

Customize | Find | View All  First 1 of 1 Last

#	*Waiver Basis Code	Description		
1	CEEB 	The College Board Fee Waiver		

Application Fee Waiver Process:

☐ Require Manual Reconciliation

☒ Allow to Post

☒ App Fee Status Waived

☐ App Fee Status Waiver Request

Application Center Table page

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

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

Academic Career	Select an academic career if this application center is for only <i>one</i> academic career. If you want this application center available to <i>all</i> careers, leave this field blank. Define academic careers on the Academic Career Table page.
Application Fee Code	Select the appropriate application fee code for this application center. Define application fee codes on the Application Fees page in PeopleSoft Student Financials. If you do not charge an application fee, you can leave this field blank.
Deposit Fee Code	Select the appropriate deposit fee code used for this application center. Define deposit fee codes on the Deposit Fees page in Student Financials. If you do not charge deposits, you can leave this field blank.
Calculate Deposit Fee in Batch	Select if you want to allow users to <i>save</i> applications without calculating a deposit fee. When you enter a status of <i>Admitted</i> on the Application Program Data page, the system does <i>not</i> prompt you to calculate the deposit. Rather, you use the Deposit Fees Calc (deposit fees calculation) batch process (SFPBADEP) to calculate the deposit fee. This enables you to automate the deposit fee calculation process. If you clear this check box, the system <i>does</i> prompt you to calculate a deposit fee when you enter a status of <i>Admitted</i> on the Application Program Data page.

AAWS Application Fee and Waiver Processing

AAWS application fee processing uses staging data in the Application Transactions component.

Use this group box to set up the options for AAWS application fee and waiver processing.

SF Merchant ID and SF eCheck Merchant ID	Select a SF Merchant ID (for credit card) or a SF eCheck Merchant ID or both for AAWS fee processing. Based on this setup, during the AAWS fee calculation and payment process, a List of Values web service determines which payment methods are available to an applicant on the external User Interface site. A merchant ID is a user-defined element that defines the rules for interfacing with a third party payment processor. Define Student Financials merchant IDs on the SF Merchants page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Merchants). See <i>PeopleSoft Student Financials 9.0 PeopleBook</i>, "Setting Up ePayment Processing," Setting Up SF Merchants.
When is Fee Payment Required	If you select Pay Later, the payment processing must be handled outside of AAWS processing. The online application can be submitted and be posted to the core production Application Maintenance component but your institution must follow up with the applicant and process the payment outside of AAWS processing.
Allow Application Fee Waiver	If you select Yes, the Valid Waiver Basis Codes group box and Application Fee Waiver Process fields become available.

Valid Waiver Basis Codes

You can select from waiver basis codes that have been set up on the Application Fee Waiver Basis page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Fee Waiver Basis).

Application Fee Waiver Process

- If you select Require Manual Reconciliation, an administrator must approve or deny the waiver in the Application Transactions staging component before the application can be posted to core production.
- If you select Allow to Post, the application can be posted to core production and the administrator assesses the waiver request in the Application Maintenance component.

If your school allows waivers but automatically grants the waiver without review or assessment, you can select App Fee Status Waived as the Allow to Post option. When the application is posted, the Fee Status field value in Application Maintenance is set to *Waived*.

If your school requires waiver requests to be assessed, select App Fee Status Waiver Request as the Allow to Post option. When the application is posted, the Fee Status field value in Application Maintenance is set to *Waiver*.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Using Admission Applications Web Services, Payment Integration Web Service Operations

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Setting Up Fees and Tuition Groups," Setting Up Application Fees.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Using GL Interface Processing," Generating Direct to GL Entries.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Using Student Financials Web Services for Hosted ePayment Transactions."

See Also

[Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 17](#)

[Chapter 17, "Adding and Updating Applications," Entering Application Program Data, page 216](#)

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Defining Recruiters

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

This section lists prerequisites and discusses how to:

- Designate recruiters.
- Assign recruiters to recruiting categories.
- Link recruiters to geographic regions.
- Associate recruiters with recruiting and application centers.
- Link recruiters with academic programs and academic plans.

Prerequisites

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

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

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding a Person to Your Campus Solutions Database," Adding an Individual to Your Database

Pages Used to Identify Recruiters

Page Name	Definition Name	Navigation	Usage
Recruiters	RECRUITERS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiters	Designate a person as a recruiter or to update a recruiter's information.
Recruiter Categories	RECRUITER_RCR_CAT	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Categories	Assign recruiting categories to recruiters. This aids in recruiter assignment. You also assign recruiting categories to prospects and applicants, enabling you to match appropriate recruiters to prospective students.

Page Name	Definition Name	Navigation	Usage
Recruiter Regions	RECRUITER_REGIONS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Regions	Link recruiters at the career level to specific geographic regional assignments. You can also use this page to exclude recruiters from certain regions or external organizations. For example, you can assign a recruiter to the Texas region, but <i>exclude</i> him or her from Abilene and Waco. You also link prospects and applicants to geographic regions, enabling you to match appropriate recruiters to prospective students.
Recruiter Centers	RECRUITER_CENTERS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Centers	Link a recruiter to the appropriate recruiting and application centers, which is beneficial for grouping and reporting purposes. You can link prospects to recruiting centers and applicants to application centers.
Recruiter Programs	RECRUITER_PROGRAMS	Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Programs	Link recruiters to academic programs and academic plans.

Designating Recruiters

Access the Recruiters page (Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiters).

Recruiters	Recruiter Categories	Recruiter Regions	Recruiter Centers	Recruiter Programs
Academic Institution:	PSUNV	PeopleSoft University		
Academic Career:	UGRD	Undergraduate		
Recruiter ID:	ADREC1	Chavez, John Joseph		

Find View All		First	1 of 1	Last
*Effective Date:	01/01/1900		*Status:	Active
*Recruiter Type:	Staff			

Find View All		First	1-2 of 2	Last
*Recruiter Role	Evaluator			
	Event Representative			

Recruiters page

Recruiter Type

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

Recruiter Role

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

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

Assigning Recruiters to Recruiting Categories

Access the Recruiter Categories page (Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Categories).

Recruiters	Recruiter Categories	Recruiter Regions	Recruiter Centers	Recruiter Programs
Academic Institution:	PSUNV	PeopleSoft University		
Academic Career:	UGRD	Undergraduate		
Recruiter ID:	ADREC1	Chavez, John Joseph		
Find View All First 1 of 1 Last				
Effective Date:	01/01/1900	Status:	Active	
Recruiter Type:	Staff			
Find View All First 1-3 of 3 Last				
*Category	Group	*Assignment Stage		
BKBL  Basketball	Athletics	Prospect/Applicant  		
REGN  Region	Region	Prospect/Applicant  		
TRFL  Track & Field	Athletics	Prospect/Applicant  		

Recruiter Categories page

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

Group The group to which this category belongs.

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

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

Linking Recruiters to Geographic Regions

Access the Recruiter Regions page (Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Regions).

Recruiters	Recruiter Categories	Recruiter Regions	Recruiter Centers	Recruiter Programs
Academic Institution:	PSUNV	PeopleSoft University		
Academic Career:	UGRD	Undergraduate		
Recruiter ID:	ADREC1	Chavez, John Joseph		
Find View All First 1 of 1 Last				
Effective Date:	01/01/1900	Status:	Active	
Recruiter Type:	Staff			
Find View All First 1 of 2 Last				
*Stage:	Prospect/Applicant			+ -
*Region:	CCOAST	CA Central Coast		
*Include/Exclude:	Exclude			+ -
Find View All First 1 of 1 Last				
External Org ID	000010041	Seaside High School		Include/Exclude Include + -

Recruiter Regions page

Stage

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

Region

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

Include/Exclude

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

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

External Org ID (external organization ID)

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

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

Include/Exclude

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

An Example of Including and Excluding Regions and Schools

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

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

Associating Recruiters with Recruiting and Application Centers

Access the Recruiter Centers page (Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Centers).

Recruiting Center

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

Application Center

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

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

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Linking Recruiters with Academic Programs and Academic Plans

Access the Recruiter Programs page (Student Recruiting, Student Recruiters, Create/Update Recruiters, Recruiter Programs).

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

Note. Prospect records use the Last Prospect Date to determine if the program, plan, or subplan should appear in the prompts. If the Last Prospect Date is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the date is less than or equal to the current date, the system does not display the value in the prompt.

Academic Program	Enter the academic programs in which this recruiter is involved.
Academic Plan	Enter the academic plans, within the chosen academic programs, that apply to this recruiter.

Chapter 3

Setting Up Prospects

This chapter discusses how to :

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

Setting Up Admission Installation Defaults

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

This section discusses how to set up admission installation defaults.

Page Used to Set Up Admission Installation Defaults

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

Setting Up Admission Installation Defaults

Access the Installation Defaults - AD page (Set Up SACR, Install, Admissions Installation).

Installation Defaults - AD

From Prospect to Application

☒ Copy Data

Matching Criteria

☐ Career, Institution
☒ Career, Institution, Term
☐ Career, Institution, Adm Type
☐ Career, Institution, Program
☐ Career, Inst, Term, Adm Type
☐ Career, Inst, Term, Prog
☐ Car, Inst, Term, Ad Type, Prog

Data to Copy

☒ Recruiting Categories
☒ Last School/Graduation Date
☒ Fin Aid/Housing/Admit Type/Acad Lvl & Load

From Application to Prospect

☒ Update Data

Create Prospect if no Match

☒ Create Prospect

Recruiting Status:

Referral Source:

Appl on File Warning Criteria

☐ Institution, Career
☐ Institution, Career, Program
☒ Inst, Career, Prog, Admit Term

Student Response

☒ Free Form Institution

Academic Interest

☒ Use Priority

Last School Attended

☒ Warn for Last School Attended

Intl Student Health Coverage

☐ Display on Appl Data Page

External Course Entry

☒ Duplicate Course Warning

Installation Defaults - AD page

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

From Prospect to Application

Copy Data

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

Matching Criteria

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

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Setting User Defaults."

Data to Copy

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

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

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

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

See [Chapter 12, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 116.](#)

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

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

From Application to Prospect

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

Update Data

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

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

Create Prospect if no Match

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

Create Prospect

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

Recruiting Status and Referral Source

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

Appl on File Warning Criteria

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

Institution, Career

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

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

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

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

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

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

Student Response

Free Form Institution

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

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

See [Chapter 17, "Adding and Updating Applications," Updating Applications, page 254.](#)

Academic Interest

Use Priority

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

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

See [Chapter 13, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 149.](#)

Last School Attended

Warn for Last School Attended

Select this check box to have the following warning message appear: "The Last School Attended will not be automatically added to the academic history record."

This message appears if you enter a value in the Last School Attended field on the Prospect School/Recruiting page or the Application School/Recruiting page at the time of updating a prospect or applicant record. You should use the External Education page to update an applicant's or prospect's academic history.

The warning message does not appear if you enter a value in the Last School Attended field on the Prospect School/Recruiting page or the Application School/Recruiting page at the time of prospect or applicant creation.

External Course Entry

Duplicate Course Warning

Select this check box to warn the user that a duplicate external course has been entered in the Education component. The following message appears: "Warning - Duplicate row for Subject (Subject) and Course Nbr (Course Number) in Organization (Ext Org ID) (14200, 456)".

A duplicate course is defined as the same school subject and course number for an external organization.

Setting Up Admit Types

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

This section discusses how to set up admit types.

Page Used to Set Up Admit Types

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

Setting Up Admit Types

Access the Admit Type Table page (Set Up SACR, Product Related, Recruiting and Admissions, Prospect/Applicant Recruiting, Admit Type Table).

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

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

Setting Up Referral Sources

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

This section discusses how to set up referral sources.

Page Used to Set Up Referral Sources

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

Setting Up Referral Sources

Access the Referral Source Table page (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Referral Source Table).

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

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

See Also

[Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 25](#)

Setting Up School Types

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

This section discusses how to set up school types.

Page Used to Set Up School Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
School Type Table	SCHOOL_TYPE_TABLE	Set Up SACR, Common Definitions, External Education, School Type Table	Set up school types and categorize external organization material.

Setting Up School Types

Access the School Type Table page (Set Up SACR, Common Definitions, External Education, School Type Table).

School Type Table page

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

Advisement School Type	If this is an advisement school, select an advisement school type. Values for this field are delivered with your system as translate values. You can modify these translate values.
Use Within Student Response	When you are defining a school type code, you must also specify whether this school type can be used with the Student Response feature. Select this check box to enable student response reasons when defining a school type on the School Type Table page.
Canadian School Govt Class (Canadian school government class)	This field only appears if your system installation country equals <i>CAN</i>. In order to report the correct value for the school type, select a Canadian classification value. Use the values to define the schools type. Values are <i>Elementary</i>, <i>Post Sec</i>, <i>Secondary</i>, <i>University</i>, and <i>Unknown</i>. These values are delivered as translate values. You can change them.

(AUS) DEEWR Credit Basis
(Department of Education,
Employment, and Workplace
Relations credit basis)

Enter the value to be reported for DEEWR Element 561 Credit-Basis, if the school type is assigned to manual course credits processed for the student.

This field appears only if the DEST, HECS, Centrelink, TAC (Department of Education, Science and Training , Higher Education Contribution Scheme, Centrelink, Tertiary Admissions Centre) check box is selected on the SA Features page.

**(AUS) DEEWR Provider
Type VET** (Department of
Education, Employment, and
Workplace Relations provider
type Vocational Education and
Training)

Enter the value to be reported for DEEWR Element 564 Provider Type, if the school type is assigned to manual course credits processed for the student.

This field is optional. If the school type is not used for VET related study, you do not have to enter a value.

This field appears only if the DEST, HECS, Centrelink, TAC check box is selected on the SA Features page.

See Also

[Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 25](#)

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Organization Data"

Setting Up Extracurricular Activities

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

This section discusses how to set up extracurricular activities.

Page Used to Set Up Extracurricular Activities

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

Setting Up Extracurricular Activities

Access the Extracurricular Activity Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Table).

Extracurricular Activity Table	
SetID:	PSUNV
Extracurricular Activity:	A01
Description Find View All First ◀ 1 of 1 ▶ Last	
*Effective Date:	01/01/1900  *Status: Active   
*Description:	Archery
Short Description:	Archery
*Activity Type:	Athletics 
Activity Offering ☒ Internal and External ☐ Internal ☐ External	
Extra Activity Primacy:	☐

Extracurricular Activity Table page

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

Activity Offering

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

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

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

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

Additional Elements

Extra Activity Primacy

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

Setting Up Honors and Awards

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

This section discusses how to set up honors and awards.

Page Used to Set Up Honors and Awards

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

Setting Up Honors and Awards

Access the Honors/Awards Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Honors and Awards Table).

Honors/Awards Table	
Academic Institution:	PSUNV PeopleSoft University
Honor/Award:	DEANLS
Honors/Awards Detail Find View All First 1 of 1 Last	
*Effective Date:	01/01/1900 *Status: Active
*Description:	Dean's List Short Description: Deans List
*Internal/External:	Internal
Grantor:	
Transcript Level:	Official
*Formal Description:	Dean's List

Honors/Awards Table page

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

Internal/External

Select a value to indicate whether this award or honor is internal or external to your institution.

Grantor

Enter a grantor if one is associated with this award.

Transcript Level

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

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

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

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

Value	Translate Table Values Long Name for TRANSCRIPT_LEVEL Field
00	Never Print

<i>Value</i>	<i>Translate Table Values Long Name for TRANSCRIPT_LEVEL Field</i>
20	Print on Official
40	Print on Unofficial
60	Print on Student Life
80	Print on Degree Programs

Formal Description

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

Setting Up Student Groups

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

This section discusses how to set up student groups.

Page Used to Set Up Student Groups

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

Setting Up External Summary Types

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

This section discusses how to set up external summary types.

Page Used to Set Up External Summary Types

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

Setting Up External GPA Tables

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

This section discusses how to:

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

Pages Used to Set Up External GPA Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External GPA Type Table	GPA_TYPE_TABLE	Set Up SACR, Common Definitions, External Education, External GPA Type Table	Set up grade point average types for external organizations.
External GPA Rules Table	GPA_RULES_TABLE	Set Up SACR, Common Definitions, External Education, External GPA Rules Table	Define your GPA conversion rules.

Defining External GPA Type Codes

Access the External GPA Type Table page (Set Up SACR, Common Definitions, External Education, External GPA Type Table).

External GPA Type Table

Academic Institution: PSUNV PeopleSoft University

GPA Type: 100A

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: 100 Point Scale A

*Short Description: 100 Pt A

GPA Values Find | View All First 1 of 1 Last

*External GPA	*Description	Short Desc

External GPA Type Table page

Defining the External GPAs

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

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

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

Setting Up GPA Conversion Rules for GPA Types

Access the External GPA Rules Table page (Set Up SACR, Common Definitions, External Education, External GPA Rules Table).

External GPA Rules Table

Academic Institution: PSUNV PeopleSoft University

GPA Type: 100A 100 Point Scale A

***Effective Date:** 01/01/1900

GPA Conversion Rules

Converted GPA	From GPA	To GPA
0.700	50.000	52.000
1.000	53.000	56.000
1.500	57.000	59.000
1.700	60.000	62.000
2.000	63.000	66.000

External GPA Rules Table page

- Effective Date** Enter an effective date for this GPA rule. If the effective date is equal to or greater than the effective date for this GPA type, then this GPA rule is active.
- Converted GPA** Enter the converted GPA that applies to the range entered in the From GPA and To GPA fields.
- From GPA and To GPA** You can enter any numeric value in these fields. If you defined GPA values (on the GPA Type Table page) for this GPA type, you can prompt for those values, but you can also enter values that are not defined. You can add as many converted GPAs as required for a GPA type.

Reviewing Material Types and Defining Material Groups

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

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

This section discusses how to:

- View material types.
- Use the Material Type Field Usage page.
- Set up material groups.

Pages Used to Review Material Types and Define Material Group

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

Viewing Material Types

Access the Material Type Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Material Type Table).

Material Type Table			
Customize Find View All 			
Material Type		General Material	
AUD	Audition	☒	Material Data
CRS	External Courses	☐	Material Data
ESS	Essay	☒	Material Data
INT	Interview	☒	Material Data
POR	Portfolio	☒	Material Data
REC	Recommendation	☒	Material Data
SBJ	External Subjects	☐	Material Data
SUM	Academic Summary	☐	Material Data
TRN	Transcripts	☐	Material Data

Material Type Table page

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

General Material

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

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

Material Data

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

Using the Material Type Field Usage Page

Access the Material Type Field Usage page (Click the Material Data link on the Material Type Table page).

Material Type: AUD Audition	
Variable Data	
Portfolio Type:	Address Line 1:
Essay Topic:	Address Line 2:
Interview Type:	Address Line 3:
Rcmd Type:	Address Line 4:
Audition Type: Y	City:
Recommender ID:	In City Limit:
Interviewer ID:	County:
Committee:	State:
Name:	Postal Code:
Title:	Country:
External Org ID:	Country Code:
Location Nbr:	Telephone:
Org Name:	

Material Type Field Usage page

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

<i>Material Type Values</i>	<i>General Material?</i>
AUD - Audition	Y
CRS - External Courses	N
ESS - Essay	Y
INT - Interview	Y
POR - Portfolio	Y
REC - Recommendation	Y
SBJ - External Subjects	N
SUM - Academic Summary	N
TRN - Transcripts	N
TST - Test Scores	N

Setting Up Material Groups

Access the Material Group Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Material Group Table).

Material Group Table

Academic Institution: PSUNV PeopleSoft University

Material Group: GRAUDTNS

Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status:** Active

***Description:** Graduate Auditions

Short Description: Grd Audtns

Material Type Find | View All First 1 of 1 Last

AUD Audition

Material Group Table page

Material Type

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

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

Chapter 4

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

The chapter provides an overview of self-service request information and discusses how to:

- Set up self-service request information.
- Use self-service student recruiting for Recruiting and Admissions.

Understanding Self-Service Request Information

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

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Understanding PeopleSoft Campus Self Service."

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

Prerequisites

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

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

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

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

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Communications," Defining Communication Speed Keys

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Using the 3C Engine," Defining 3C Engine Events

Requesting Self-Service Information

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

Note. New User Registration functionality is currently not delivered for requesting self-service information. Check with your customer representative for the availability date.

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

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

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

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

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Understanding PeopleSoft Campus Self Service."

Setting Up Self-Service Request Information

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

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

This section discusses how to:

- Enable segments and prospect career fields.
- Set up institution and career parameters.

Pages Used to Set Up Self-Service Request Information

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

Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page.

The screenshot shows a web interface titled 'Web Prospect Setup' with a sub-tab 'Web Prospect Setup 2'. It contains two main sections:

- Enable Segments:**
 - ☒ Academic Interests
 - ☒ Test Results
 - ☐ Academic Program
 - ☐ Academic Plan
 - ☐ Academic Sub-Plan
- Enable Prospect Career Fields:**
 - ☐ Campus
 - ☒ Admit Term
 - ☐ Admit Type
 - ☐ Academic Level
 - ☐ Academic Load
 - ☐ Housing Interest
 - ☐ Financial Aid Interest
 - ☐ Last School Attended
 - ☐ Graduation Date

Web Prospect Setup page

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

Enable Segments

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

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

Enable Prospect Career Fields

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

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

Setting Up Institution and Career Parameters

Access the Web Prospect Setup 2 page.

The screenshot displays the 'Web Prospect Setup 2' page. It features three main sections:

- Acad Int/Test Results Defaults:** Contains a '*Data Source:' dropdown menu set to 'Web'.
- Institution Setup Parameters:** Includes fields for '*Academic Institution:' (GLAKE, Great Lakes University), '*Recruiting Status:' (Applicant), and '*Referral Source:' (EVNT, Campus Event). It also has search icons and expand/collapse buttons.
- Career Setup Parameters:** Includes fields for '*Academic Career:' (UGRD, Undergraduate) and '*Recruiting Center:' (UCTR, University Recruiting Center). It also has checkboxes for 'Allow Prospect To Select Comm' and 'Send Default Communication', each followed by an 'Event ID:' field with a search icon.

Navigation links like 'Find | View All' and 'First 1 of 1 Last' are present at the top of the parameter sections.

Web Prospect Setup 2 page

Acad Int/Test Results Defaults

Data Source

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

Institution Setup Parameters

Academic Institution	Enter the academic institution that you want to be available to the visitor. If you enter more than one academic institution, visitors can select the academic institution that they are interested in on the Request Information detail page. The system uses the academic institution that the visitor selects to create the prospect record. If you enter only one academic institution, the system hides the Academic Institution field on the Request Information page. In this case, the system uses the one academic institution that you entered here to create the prospect record. You must enter at least one academic institution.
Recruiting Status	Select the recruiting status that you want the system to assign to the new prospect record. You can enter a different recruiting status for each academic institution. The system assigns the recruiting status to new prospect records, based on information collected through the Request Information self-service transaction.
Referral Source	Enter the referral source for information collected through the Request Information self-service transaction. You can enter a different referral source for each academic institution. The referral source that you enter here posts to the Prospect Career Data page.

Career Setup Parameters

Academic Career	Enter the academic careers that you want to be available for the visitor to select. On the Request Information detail page, visitors can select the academic careers that interest them. The system uses the selected academic career to create the prospect record. You must enter at least one academic career.
Recruiting Center	Enter the recruiting center that you want the system to assign to the new prospect record. You can enter a different recruiting center for each academic career. The system assigns the selected recruiting center to new prospect records, based on information collected through the Request Information self-service transaction.
Allow Prospect to Select Comm (allow prospect to select communication)	Select this check box to enable visitors to select from a list of available communications. If you select this check box, a group box that lists the communication items contained in the event ID that you select appears on the Request Information detail page. Visitors can select which items to receive. For example, the <i>UGRD Web Prospect</i> event ID at PSUNV includes communications containing information on financial aid, campus housing, and undergraduate applications. Visitors can choose one or more communications from this list. However, only those events that have the User Selection check box selected on the Event Definition Setup page appear as choices in the Event ID field, next to the Allow Prospect to Select Comm field.

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

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Campus Event Planning," Creating an Event.

Using Self-Service Student Recruiting for Recruiting and Admissions

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

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

Prerequisites

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

Pages Used to Manage Student Recruiting for Recruiting and Admissions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospects by Category - Select Search Criteria	SS_ADM_PRS_REQ_CAT	Self Service, Student Recruiting, View Prospects by Category	Recruiting officers use this page to search for prospects by category.
Prospects by Category - Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category - Select Search Criteria page.	Recruiting officers use this page to view prospect search results.

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

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

Chapter 5

Using Admission Applications Web Services

At the time of publication of this PeopleBook, the latest version of the Using Admission Applications Web Services chapter is available on the following My Oracle Support page, as part of the Recruiting and Admissions documentation package for Bundle 23:

CS 9.0 Bundle #23 Functional Documentation and Additional Features October 2011 [ID 1371376.1]

Chapter 6

Managing PeopleSoft Admission Transactions

At the time of publication of this PeopleBook, the latest version of the Managing PeopleSoft Admission Transactions chapter is available on the following My Oracle Support page, as part of the Recruiting and Admissions documentation package for Bundle 23:

CS 9.0 Bundle #23 Functional Documentation and Additional Features October 2011 [ID 1371376.1]

Chapter 7

Using File Parser for Loading Applications

At the time of publication of this PeopleBook, the latest version of the Using File Parser for Loading Applications chapter is available on the following My Oracle Support page, as part of the Recruiting and Admissions documentation package for Bundle 24:

CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 [ID 1400708.1]

Chapter 8

Setting Up External Test Score Loads

This chapter discusses how to:

- Enable the posting to CRM option.
- Define external test components.
- Define external tests.
- Define and review external data setup tables.
- Map external test IDs.
- Map external test codes to internal codes.

Note. You must complete these items before you can post external test scores to PeopleSoft Campus Solutions or PeopleSoft CRM. When you post the test scores to CRM, the system automatically creates prospect records in CRM from the posted test scores. However, when you post the test scores to Campus Solutions, you can choose whether or not to create prospect records in Campus Solutions.

Enabling the Posting to CRM Option

If you want to post test scores to PeopleSoft CRM, select the CRM for Higher Education check box on the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

Installation Student Admin	SA Features
Installation Student Administration	
CRM Integration	
☒ CRM for Higher Education	
Australia	
☒ DEST, HECS, Centrelink, TAC	Last CART Request ID: 0
Canada	
☒ Government Reporting	☒ OUAC
New Zealand	
☒ NSI and SDR Personal Data, SDR Degree	
The Netherlands	
☐ Use Dutch Functionality	
United Kingdom	
☒ HESA, UCAS	

SA Features page

The Post To Enterprise CRM option is available on the Search/Match/Post Test Scores page only when you select the CRM for Higher Education check box on the SA Features page.

Defining External Test Components

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

Page Used to Define External Test Components

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

Defining External Tests

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

Page Used to Define External Tests

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

Defining External Tests

Access the Test Tables page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables).

Test Tables

Test ID: GRE

Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status:** Active

***Description:** Graduate Record Exam

Short Description: GRE

Testing Agency: Educational Testing Service

Find | View All First 1-4 of 26 Last

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest		
ANLY	Analytical	Analytical	200.00	800.00			
BC	Biochem, Cell, Molec Biolog	Biochem	200.00	990.00			
BY	Biology	Biology	200.00	990.00			
CH	Chemistry	Chemistry	200.00	990.00			

Test Tables page

Testing Agency

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

Component

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

Min Score/Max Score (minimum score/maximum score)

Enter a test score range for each component.

Subtest

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

Defining and Reviewing External Data Setup Tables

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

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

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

This section discusses how to:

- Map AMCAS ethnic groups.
- Map AMCAS country codes.
- Map SAT country codes.
- Map ethnicity codes.

Pages Used to Review External Data Setup Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
AP Subject Test Codes	AP_SUBJECT_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AP Subject Test Codes	Define or review the delivered AP subject test codes or to add or edit a code. This table stores the test codes used on the AP test. You can link your own codes and descriptions to these codes so that the system displays your codes after the scores are posted. Use the AP Subjects section on the External Test Score Load page to link your subject test components to the delivered codes.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
AP Country Codes	SAD_AP_CNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AP Country Codes	Translates the AP country values to internal PeopleSoft country values during the AP-specific load routine. The AP Country Codes table is delivered with known values set as of the date of this publication. You might need to add or delete rows to accurately maintain the table in the future.
ADA Country Table	ADA_COUNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, ADA Country Codes	Define or review the AADAS country code. Before processing the ADA external test score load, use the Country field to map AADAS country codes used on the ADA to PeopleSoft country codes. Note. This setup is relevant only for posting to Campus Solutions. The system does not support posting ADA test scores to CRM therefore this setup is not needed for posting test scores to CRM.
CRS Major Codes	CRS_MJR_CD_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, CRS Major Codes	Review the delivered CRS major codes or add or edit a code.
AMCAS Credit Hours Codes	AMCAS_CR_HR_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS Credit Hour Codes	Define or review the delivered AMCAS credit hours codes or add or edit a code. An AMCAS file includes only the actual number of credit hours, so this table includes the codes and descriptions that are mapped to the AMCAS credit hour types. Note. This setup is relevant only for posting to Campus Solutions. The system does not support posting AMCAS test scores to CRM therefore this setup is not needed for posting test scores to CRM.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
AMCAS GPA Codes	AMCAS_GPA_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS GPA Codes	Define and review the delivered AMCAS GPA codes or add or edit a code. An AMCAS file only includes the actual GPA, so this table includes the codes and descriptions that are mapped to the GPA. Note. This setup is relevant only for posting to Campus Solutions. The system does not support posting AMCAS test scores to CRM therefore this setup is not needed for posting test scores to CRM.
AMCAS Ethnicity Map	SAD_AMC_ETHNIC_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS Ethnicity Mapping	For AMCAS and MCAT only, map the race codes provided by testing agency to the corresponding PeopleSoft codes in order to capture ethnicity information on the Add/Update a Person component. Note. This setup is relevant only for posting to Campus Solutions. The system does not support posting AMCAS test scores to CRM therefore this setup is not needed for posting test scores to CRM.
AMCAS Country Mapping	SAD_AMC_CNT_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS Country Mapping	Map the AMCAS country code values to the corresponding PeopleSoft country code values. Note. This setup is relevant only for posting to Campus Solutions. The system does not support posting AMCAS test scores to CRM therefore this setup is not needed for posting test scores to CRM.

Page Name	Definition Name	Navigation	Usage
SAT Country Codes	SAD_SAT_CNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Country Codes	Translates the SAT country values to internal PeopleSoft country values during the SAT specific load routine.
SAT Math Recentered Values	SAT_MATH_RECENTER	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Math Recentered Values	Review or edit the recentered SAT math score values. When you process SAT math scores, the system recenters some of the scores (as indicated by the SAT load) according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score it receives from the testing agency in the Math Score field. The translated score appears in the Recentered Math Score field. This is the score that the reported score is translated to when it is processed.
SAT Verbal Recentered Values	SAT_VERBAL_RECENTR	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Verbal Recentered Values	Review or edit the recentered SAT verbal score values. When you process SAT verbal scores, the system recenters some of the scores according to the values in this table. When the system recenters scores, only the recentered scores post to the person's record. The system displays the score that it receives from the testing agency in the Verbal Score field. The score that appears in the Recentered Verbal Score field is what the reported score is translated to when it is processed.

Page Name	Definition Name	Navigation	Usage
SAT II Test Codes	SATII_CODE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT II Test Codes	Review the delivered SAT II test codes or add or edit a code. You can link your own codes and descriptions to the codes that you received in an SAT II tape or file so that your codes appear on your Admissions pages.
SAT II Test Recentered Values	SATII_TST_RECENTER	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT II Test Recentered Values	Review or edit the recentered test score values for each SAT II test code. When you process SAT II scores, the system recenters the scores according to the values in this table. Only the recentered scores post to the person's record. The left column lists the SAT II test scores received from the testing agency. The right column lists the recentered test scores, which are what the reported score is translated to when it is processed.
Ethnicity Map	SAD_ETHNICITY_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Ethnicity Mapping	Map the ethnicity codes provided by testing agencies to the corresponding PeopleSoft codes in order to capture ethnicity information on the Bio/Demo Data component.
GMAT Country Codes	SAD_GMT_CNTRY_TBL	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, GMAT Country Codes	Define or review the mapping of GMAT Country Codes to PS Country Codes. Before processing the GMAT external test score load, use the Country field to map GMAT country codes to PeopleSoft country codes.

Mapping AMCAS Ethnic Groups

Access the AMCAS Ethnicity Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS Ethnicity Mapping).

AMCAS Ethnicity Map

Test ID

MCAT

Medical College Admission Test

Application Year

2006

*Regulatory Region

USA

United States

Copy Ethnicity Map to New Application Year

CustomizeFindView All

First1 of 1Last

	Ethnic Group	Description	AMCAS Race Code		
1	ASIAN	Asian	AC	+	-

AMCAS Ethnicity Map page

- Ethnic Group

Enter the internal ethnic group value that corresponds to the race code.
- AMCAS Race Code

Enter the external AMCAS race code.
- Copy Ethnicity Map to New Application Year

Click to copy ethnicity mapping data from one application year to another. The system prompts you for the new year value.

Mapping AMCAS Country Codes

Access the AMCAS Country Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, AMCAS Setup, AMCAS Country Mapping).

AMCAS Country Mapping

Application Year: 2007

Copy Country Map to New Application Year

Customize Find View 100 First 1-20 of 238 Last					
	AMCAS Country Code	Country	Description		
1	10	ATA	Antarctica	+	-
2	100	BGR	Bulgaria	+	-
3	104	MMR	Myanmar	+	-
4	108	BDI	Burundi	+	-
5	112	BLR	Belarus	+	-
6	116	KHM	Cambodia	+	-
7	12	DZA	Algeria	+	-
8	120	CMR	Cameroon	+	-
9	124	CAN	Canada	+	-
10	132	CPV	Cape Verde	+	-
11	136	CYM	Cayman Islands	+	-
12	140	CAF	Central African Republic	+	-
13	144	LKA	Sri Lanka	+	-
14	148	TCD	Chad	+	-
15	152	CHL	Chile	+	-
16	156	CHN	China	+	-
17	158	TWN	Taiwan, Province of China	+	-
18	16	ASM	American Samoa	+	-
19	162	CXR	Christmas Island	+	-
20	166	CCK	Cocos (Keeling) Islands	+	-

AMCAS Country Mapping page

Copy Country Map to New Application Year

The country code mappings are keyed by application year. Click this button to copy values from one application year to a new application year. You might need to add or delete rows to accurately maintain the table in the future.

AMCAS country code values mapped to PeopleSoft values for application years 2006 and 2007 are delivered with this release. Some AMCAS country codes do not have equivalent PeopleSoft country codes. Hence, these are not delivered. Your institution must determine the mappings for these values.

The following values are not delivered for application year 2006:

Country Code	Country	Description
996	ALA	Aaland Island
830	CHI	Channel Islands
891	SCG	Serbia and Montenegro
626	TMP	East Timor
998	UCI	United States Miscellaneous Caribbean Islands
997	UPI	United States Miscellaneous Pacific Islands

The following values are not delivered for application year 2007:

Country Code	Country	Description
248	ALA	Aaland Islands
	FXX	France, Metropolitan
891	SCG	Serbia and Montenegro

Mapping SAT Country Codes

Access the SAT Country Codes page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, SAT Setup, SAT Country Codes).

SAT Country Codes

Customize Find First 1-227 of 227 Last								
	*SAT Country Code	*SAT Country Description	*Country		State / Province			
1	001	AFGHANISTAN	AFG	Q	Afghanistan	Q		+ -
2	003	ALBANIA	ALB	Q	Albania	Q		+ -
3	005	ALGERIA	DZA	Q	Algeria	Q		+ -
4	008	ANDORRA	AND	Q	Andorra	Q		+ -
5	010	ANGOLA	AGO	Q	Angola	Q		+ -
6	011	ANGUILLA	AIA	Q	Anguilla	Q		+ -
7	012	ANTIGUA AND BARBUDA	ATG	Q	Antigua and Barbuda	Q		+ -
8	015	ARGENTINA	ARG	Q	Argentina	Q		+ -
9	016	ARMENIA	ARM	Q	Armenia	Q		+ -
10	017	ARUBA	ABW	Q	Aruba	Q		+ -
11	020	AUSTRALIA	AUS	Q	Australia	Q		+ -
12	025	AUSTRIA	AUT	Q	Austria	Q		+ -
13	029	AZERBAIJAN	AZE	Q	Azerbaijan	Q		+ -
14	035	BAHAMAS, THE	BHS	Q	Bahamas	Q		+ -
15	040	BAHRAIN	BHR	Q	Bahrain	Q		+ -

SAT Country Codes page (top of page)

208	605	VIETNAM	VNM	Viet Nam			+	-
209	610	WALES	GBR	United Kingdom			+	-
210	611	PALESTINIAN TERRITORIES	PSE	Palestinian Territory, Occupie			+	-
211	620	SAMOA (FORMER WESTERN SAI	WSM	Samoa			+	-
212	623	YEMEN	YEM	Yemen			+	-
213	626	YT CANADA	CAN	Canada	YT	Yukon	+	-
214	630	CONGO, DEMOCRATIC REPUB	COD	Congo, The Democratic Republic			+	-
215	635	ZAMBIA	ZMB	Zambia			+	-
216	643	NF CANADA	CAN	Canada	NF	Newfoundland (NF)	+	-
217	644	NT CANADA	CAN	Canada	NT	Northwest Territories	+	-
218	644	NU CANADA	CAN	Canada	NU	Nunavut (NU)	+	-
219	645	NS CANADA	CAN	Canada	NS	Nova Scotia	+	-
220	646	ON CANADA	CAN	Canada	ON	Ontario	+	-
221	647	PE CANADA	CAN	Canada	PE	Prince Edward Island	+	-
222	648	QC CANADA	CAN	Canada	QC	Quebec	+	-
223	649	SK CANADA	CAN	Canada	SK	Saskatchewan	+	-
224	650	AB CANADA	CAN	Canada	AB	Alberta	+	-
225	651	BC CANADA	CAN	Canada	BC	British Columbia	+	-
226	653	MB CANADA	CAN	Canada	MB	Manitoba	+	-
227	654	NB CANADA	CAN	Canada	NB	New Brunswick	+	-

SAT Country Codes page (bottom of page)

The SAT Country Codes table is delivered with known field values set as of the date of this publication. You might need to add, edit, or delete rows to accurately maintain the table in the future.

SAT Country Code and SAT Country Description

SAT country codes, descriptions and their corresponding PeopleSoft country codes are delivered in the table.

State/Province

If a state or province is associated with the specific SAT code, that state or province is also delivered in the table.

Mapping Ethnicity Codes

Access the Ethnicity Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Ethnicity Mapping).

Ethnicity Map

Test ID ACT ACT Assessment

*Regulatory Region USA United States

Customize | Find | View All | First 1-6 of 6 Last

	Ethnic Group	Description	Ethnicity		
1	AMIND	American Indian/Alaska Native	1	+	-
2	ASIAN	Asian	2	+	-
3	BLACK	Black/African American	3	+	-
4	NSPEC	Not Specified	6	+	-
5	PACIF	Native Hawaiian/Other Pacific Islander	4	+	-
6	WHITE	White	5	+	-

Ethnicity Map page

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

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

For AMCAS and MCAT ethnicity data, use the AMCAS Ethnicity Map component.

See [Chapter 8, "Setting Up External Test Score Loads," Mapping AMCAS Ethnic Groups, page 71.](#)

Mapping External Tests IDs

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

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

Understanding External Test ID Mapping

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

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

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

Page Used to Map External Tests IDs to PeopleSoft Test Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Mapping	SAD_TEST_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping	Map your test ID defined on the Test Tables page to the PeopleSoft test code. The system needs this setup to perform a variety of external test-related functions. Also determine the primary candidate data record for a test, which you will need if you want to create prospect records from test score loads using a PeopleSoft Query Manager.

Mapping External Tests IDs to PeopleSoft Test Codes

Access the External Test Score Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping).

External Test Score Mapping

PeopleSoft Test Code ACT ACT Assessment ☒ **Available for CRM Post**

Mapping			
		First	Last
Test ID			
ACT	ACT Assessment	1 of 1	
		+	-

Suspense Records			
		First	Last
		1-4 of 4	
Record (Table) Name	Record Description	Primary	
SAD_ACT_SUS	ACT Suspense File	☒	+ -
SAD_ACT_SUS_COL	ACT Suspense College Extracur	☐	+ -
SAD_ACT_SUS_HS	ACT Suspense HS Activities	☐	+ -
SAD_ACT_SUS_STD	ACT Suspense Years of Study	☐	+ -

Candidate Data Records			
		First	Last
		1-4 of 4	
Record (Table) Name	Record Description	Primary	
SAD_ACT_CD	ACT Student Profile Section	☒	+ -
SAD_ACT_CD_COL	ACT SPS College Activities	☐	+ -
SAD_ACT_CD_HS	ACT SPS High School Activities	☐	+ -
SAD_ACT_CD_STD	ACT SPS Years Studied	☐	+ -

External Test Score Mapping page

Test ID

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

Available for CRM Post

Indicates whether the scores for the test ID can be posted to PeopleSoft CRM. For example, you can post ACT, AP, CRS, DAT, EOS, GMS, GMT, GRE, LSAT, SAT, SSS and TOEFL scores to CRM, therefore, the system selects the Available for CRM Post check box for these test IDs. Conversely, you cannot post ADA, AMCAS, LSDAS, NCEA, OUAC, QTAC, SATAC, Studielink, UAC, and VTAC test scores to CRM, therefore, the system does not select the Available for CRM Post check box for these test IDs.

Note. On this page, you need to enter only a test ID that corresponds to a PeopleSoft test code. PeopleSoft delivers the rest of the page complete. All test IDs that you have defined and that you intend to load through the external test score load must be mapped to a PeopleSoft test code or you will not be able to load test score data.

Warning! Do not delete the suspense or candidate data records delivered or change the primary records flag because these changes will affect the External Test Score Load and Create Prospects from Test Scores processes.

Mapping External Test Codes to Internal Codes

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

This section provides an overview of external test data mapping and discusses how to:

- Map academic interest codes.
- Map extracurricular activity codes.
- Map religious preference codes.
- Map admit terms.
- Map programs, plans and subplans.

See Also

Chapter 12, "Recruiting Prospective Students," Creating Prospects When Posting External Test Scores, page 126

Understanding External Test Data Mapping

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

Map the following codes:

- Academic interest.

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

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

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

- Extracurricular activity.

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

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

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

- Religious preference

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

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

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

Pages Used to Map External Test Codes to Internal Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Interests Map	SAD_ACAD_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Academic Interests Map	Map the academic interest codes provided by some external testing agencies to the corresponding PeopleSoft codes to capture academic interest information when creating prospects from certain test loads. Set up this page only if you want to capture academic interest information when creating prospects from test score loads. The following test layouts provide a major interest: ACT, EOS, GMASS, SAT, GRE, and SSS.

Page Name	Definition Name	Navigation	Usage
Extracurricular Activity Map	SAD_EXTRA_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Extracurricular Activity Map	Map the extracurricular activity codes provided by the ACT and ETS testing agencies to the corresponding PeopleSoft codes to capture academic interest information when creating prospects from ACT or SAT test score loads. Set up this page only if you want to capture extracurricular activity information when creating prospects from test score loads.
Religious Preference Map	SAD_REL_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Religious Preference Map	Map the religious preference codes provided by the ACT and ETS testing agencies to the corresponding PeopleSoft codes to capture religious preference information when creating prospects from ACT or SAT test score loads. Set up this page only if you want to capture religious preference information when creating prospects from test score loads.
Admit Term Map	SAD_TERM_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Admit Term Map	Map the graduation dates provided by a test layout to the corresponding PeopleSoft admit terms. Set up this page only if the test layout provides a graduation date and you want the system to use that date to determine the admit term when creating a prospect from a test score load. The following test layouts provide a graduation date: ACT, CRS, EOS, GMAT, and SAT.

Page Name	Definition Name	Navigation	Usage
Program Plan SubPlan Map	SAD_INTPROG_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Program Plan SubPlan Map	Map each interest code provided by the testing agency to a program, plan or subplan. Set up this page only if the test layout provides an interest code and you want the system to use the code to determine the program, plan or subplan when creating a prospect from the test load. The following test layouts provide a major interest: ACT, EOS, GMAS, SAT, GRE, and SSS.

Mapping Academic Interest Codes

Access the Academic Interests Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Academic Interests Map).

Academic Interests Map

Test ID ACT ACT Assessment

Customize | Find | View All | First 1-6 of 6 Last

	Academic Interest	Description	Interest Code		
1	BIOL	Biology	834	+	-
2	CHEM	Chemistry	836	+	-
3	COMP	Computer Science	561	+	-
4	COMP	Computer Science	562	+	-
5	ECON	Economics	410	+	-
6	FREN	French	723	+	-

Academic Interests Map page

Academic Interest

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

Interest Code

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

Mapping Extracurricular Activity Codes

Access the Extracurricular Activity Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Extracurricular Activity Map).

Extracurricular Activity Map

SetID PSUNV Peoplesoft University

Test ID SAT I Scholastic Assessment Test I

Customize | Find | 

First 1-29 of 29 Last

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

Extracurricular Activity Map page

Extracurricular Activity

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

Activity Code

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

College Activity

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

High School/Community Activity

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

Mapping Religious Preference Codes

Access the Religious Preference Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Religious Preference Map).

Religious Preference Map

Test ID ACT ACT Assessment

Customize | Find | View All | |

First 1-4 of 4 Last

	Religious Preference		Description	Religion Code		
1	CHRS		Christian	10		
2	CHRS		Christian	11		
3	CTLC		Catholic	34		
4	JWSH		Jewish	24		

Religious Preference Map page

Religious Preference

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

Religion Code

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

Mapping Admit Terms

Access the Admit Term Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Admit Term Map).

Admit Term Map

Institution: PSUNV PeopleSoft University **Career:** UGRD Undergraduate
Test ID: SAT I Scholastic Assessment Test I

[Customize](#) | [Find](#) | [View All](#) | First 1-6 of 6 Last

	*Graduation Date From	*Graduation Date To	*Term	Description		
1	08/30/2006	01/23/2007	0580	2007 Spring		
2	01/24/2007	05/29/2007	0590	2007 Fall		
3	08/30/2007	01/23/2008	0600	2008 Spring		
4	01/24/2008	08/29/2008	0610	2008 Fall		
5	08/30/2008	01/23/2009	0620	2009 Spring		
6	01/24/2009	08/29/2009	0630	2009 Fall		

Admit Term Map page

Graduation Date From and Graduation Date To Enter graduation date ranges for the test layouts that provide a graduation date.

Term Enter the admit term that corresponds to the graduation date range.

When you run the Test Score Load process, the system uses this mapping to determine the relevant admit term for the prospect. For example, let us suppose that for SAT I you have mapped 2009 Fall to the Graduate to and from dates of January 24, 2009 and August 15, 2009. When you import a SAT I test score, and if the test score of a prospect contains a graduation date of January 25 2009, the system determines 2009 Fall as the admit term for the prospect.

Note that you cannot map overlapping dates to different admit terms. For example, if you have mapped a graduation date range of January 24, 2009 and August 15, 2009 to 2009 Fall for SAT I, then you cannot map a graduation date range of May 1, 2009 and August 15, 2009 to a different admit term for SAT I.

Mapping Programs, Plans and Subplans

Access the Program Plan SubPlan Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Program Plan SubPlan Map).

Program Plan SubPlan Map

Institution: PSUNV Scholastic Assessment Test I **Career:** UGRD Undergraduate
Test ID: SAT I PeopleSoft University

Customize | Find | View All | First 1-6 of 6 Last

*Interest Code	*Academic Program	Academic Plan	Academic Sub-Plan		
410	FAU			+	-
450	FAU	MUSIC		+	-
561	FAU	MUSIC	PIANO	+	-
723	FAU			+	-
834	FAU	ART		+	-
836	LAU	BIOLBS		+	-

Program Plan SubPlan Map page

Interest Code

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

Academic Program, Academic Plan, Academic Sub-Plan

Enter the academic program, plan or subplan that corresponds to the interest code

When you run the Test Score Load process, the system uses this mapping to determine the relevant academic program, plan or subplan for the prospect. For example, let us suppose that for SAT I you have mapped interest code 450 to the *Fine Arts Undergraduate* program and *Music* plan. When you import an SAT I test score and the test score of a prospect contains the interest code 450, the system determines the program as *Fine Arts Undergraduate* and the plan as *Music* for the prospect.

Chapter 9

(CAN) Setting Up to Receive OUAC Transactions

This chapter discusses how to:

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

Setting Up EDI Manager for OUAC Transactions

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

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

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

This table lists the OUAC elements that are school specific:

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
010 - Institution	OUAC_LAW_A OUAC_LAW_U OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_CTL_WD OUAC_CTL_WD OUAC_CTL_WD OUAC_CTL_WD OUAC_CTL_WD OUAC_CTL_WD OUAC_CTL_WD	INSTITUTION INSTITUTION INSTITUTION INSTITUTION INSTITUTION INSTITUTION INSTITUTION
395 - University/Program Desired	OUAC_UAS_A OUAC_UAS_U OUAC_UAS_U OUAC_PT	OUAC_A5_U5_WD OUAC_A5_U5_WD OUAC_D1_WD OUAC_A5_U5_WD	ACAD_PROG ACAD_PROG ACAD_PROG ACAD_PROG
400 - Expected Enrollment Date	OUAC_UAS_A OUAC_UAS_U OUAC_UAS_U OUAC_PT	OUAC_A5_U5_WD OUAC_A5_U5_WD OUAC_D1_WD OUAC_A5_U5_WD	ADMIT_TERM ADMIT_TERM ADMIT_TERM ADMIT_TERM
410 - Full or Part-time	OUAC_UAS_A OUAC_UAS_U OUAC_PT	OUAC_A5_U5_WD OUAC_A5_U5_WD OUAC_A5_U5_WD	ACAD_LOAD_APPR ACAD_LOAD_APPR ACAD_LOAD_APPR
411 - Year Desired	OUAC_UAS_A OUAC_UAS_U OUAC_PT	OUAC_A5_U5_WD OUAC_A5_U5_WD OUAC_A5_U5_WD	ACADEMIC_LEVEL ACADEMIC_LEVEL ACADEMIC_LEVEL
440 - Residence Information Requested	OUAC_UAS_A OUAC_UAS_U OUAC_PT	OUAC_A5_U5_WD OUAC_A5_U5_WD OUAC_A5_U5_WD	HOUSING_INTEREST HOUSING_INTEREST HOUSING_INTEREST
600 - Final or Interim	OUAC_UAS_A OUAC_UAS_U	OUAC_M2_WD OUAC_M2_WD	TRNSCRPT_STATUS TRNSCRPT_STATUS
755 - Last Session of Study at CEGEP	OUAC_UAS_A OUAC_UAS_U	OUAC_C1_WD OUAC_C1_WD	EXT_TERM EXT_TERM

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
765 - Session CEGEP Course Taken	OUAC_UAS_A OUAC_UAS_U	OUAC_C2_WD OUAC_C2_WD	EXT_TERM EXT_TERM
531 - Year Level	OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL EXT_ACAD_LEVEL
533 - Diploma Received	OUAC_LAW_A OUAC_LAW_U OUAC_PT OUAC_TEA_A OUAC_TEA_U OUAC_UAS_A OUAC_UAS_U	OUAC_G2_H2_WD OUAC_G2_H2_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD OUAC_PI_WD	OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E
665 - University/Program Desired	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACAD_PROG ACAD_PROG
670 - Enrollment 1 Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ADMIT_TERM ADMIT_TERM
840 - University/Program Code	OUAC_TEA_A OUAC_TEA_U OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD OUAC_D1_WD	ACAD_PROG ACAD_PROG ACAD_PROG
860 - Residence Information Requested	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	HOUSING_INTEREST HOUSING_INTEREST
685 - Year Level Offered	OUAC_UAS_A OUAC_UAS_U	OUAC_AR_WD OUAC_AR_WD	ACADEMIC_LEVEL ACADEMIC_LEVEL

OUAC ELEMENT	EC Map ID	Business Doc Record	Name
1400 - Course Level	OUAC_UAS_A OUAC_UAS_U OUAC_UAS_A OUAC_UAS_U	OUAC_F2_WD OUAC_F2_WD OUAC_F3_WD OUAC_F3_WD	COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL COURSE_LEVEL
825 - Degree Code	OUAC_TEA_A OUAC_TEA_U	OUAC_A8_U8_WD OUAC_A8_U8_WD	OUAC_DIPLOMA_COD E OUAC_DIPLOMA_COD E

This table lists the translates that the PeopleSoft system maintains as transaction processing (TP) converts:

OUAC ELEMENT	Transactions	TP Convert Name
170 - Country of Current Citizenship	A4	OUAC_CNTRY
180 - Citizenship, Appendix 9.A.30	A4	OUAC_CNTRY
190 - Country of Residence, Appendix 9.A.30	A4	OUAC_CNTRY
200 - Province of Residence	A4	OUAC_PROV
220 - Immigration Status	A4	CitznStat
230 - Gender	A4	Sex
250 - Marital Status	A4	MAR_STATUS
270 - First Language	A4	Accmpl-Lng
542 - Country where attended English School	A5	OUAC_CNTRY
573 - Response to OSAP Question	A5	OUAC_Y/N
2174 - LSAT Misconduct Flag	J1	OUAC_Y/N

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

This table lists the translates that the PeopleSoft system maintains as translate tables:

OUAC ELEMENT	Transactions	Field Name
2201 - LSAT Details irreg code	J2, J3, J4	OUAC_LSAT_IRREG1 OUAC_LSAT_IRREG2 OUAC_LSAT_IRREG3 OUAC_LSAT_IRREG4
477 - Attended Postsecondary	A5	OUAC_ATTND_PSTSCND
475 - Authorization to Release Academic	A5	OUAC_AUTH_RELEASE

OUAC ELEMENT	Transactions	Field Name
397 - Cooperative Education	A5, D1	COOP_REQ
507 - Authorization to Release Univ Performance to Sec School	A9	OUAC_AUTH_RELEASE
930 - Previously Dealt w/ University	B1	OUAC_PRV_WITH_UNIV
2020 - Ever Attended Law School	B1	OUAC_ATTEND_LAW
2145 - Fee Waiver Received	G8	OUAC_WAIVER_RCVD (check box)
2151 - All OLSAS Applications	G8	OLSAS_OSGOODE_STAT OLSAS_OTTAWA_STAT OLSAS_QUEENS_STAT OLSAS_TORONTO_STAT OLSAS_WESTERN_STAT OLSAS_WINDSOR_STAT
2095 - Authorization	G3	OUAC_EMR_CNTCT_AUT
295 - Mature Student Regulation	A4	OUAC_MATURE_STDNT
935 - Second Degree	B1	OUAC_SECOND_DEGREE
2173 - Ethnic Code	J1	ETHNICITY_LSAC
2286 - Type	R2	OUAC_DEGREE_TYPE

This table lists the translates that the PeopleSoft system maintains in tables:

OUAC ELEMENT	Table Name
532 - Program of Study, Appendix 9.A.65	EXT_SUBJECT_TBL
332 - Subject of Major Interest, Appendix 9.A.80	EXT_SUBJECT_TBL

OUAC ELEMENT	Table Name
845 - Teaching Subject 1, Appendix 9.A.85 850 - Teaching Subject 2, Appendix 9.A.85	OUAC_T_SUBJECT_TBL
750 - Program Code Last Studied, Appendix 9.A.25	CEGEP_PROG_TBL
525 - Advanced Standing Program, Appendix 9.A.95	OUAC_PROG_TBL
2111 - Category, Appendix 9.A.50	OUAC_LAW_CAT_TB

See Also

PeopleSoft Supported Integrated Technologies

Setting Up OUAC Law Categories

This section lists the page used to set up OAUC law categories.

Page Used to Set Up OUAC Law Categories

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

Setting Up Teaching Subjects and CEGEP Programs

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

This section lists the pages used to set up teaching subjects.

Pages Used to Set Up Teaching Subjects

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

Setting Up OUAC Organizations

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

This section discusses how to:

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

Pages Used to Set Up OUAC Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Organization Table	EXT_ORG_TABLE	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Organization Table	Enter or update data about an organization. View and update information about the primary contact and department for the organization.

Page Name	Definition Name	Navigation	Usage
Regional	EXT_ORG_TBL_REG	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional	In the OUAC Organization Data group box, enter the Ministry of Education code, the OUAC institution code, and the current enrollment levels for the new organization.
School Data	SCC_EXT_ORG_ADM	Campus Community, Organization, Create/Maintain Organizations, Organization School Data	Enter data that applies to an organization that offers courses.
Organization Affiliation	EXT_ORG_AFFLTN	Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation	Identify details that are important to your institution in affiliation with an organization.
School Course Classification	SCHOOL_COURSES	Campus Community, Organization, Create/Maintain Organizations, School Course Classification	Record the specific course offerings for each subject area.
Comment Category Table	CMNT_CATG_TABLE	- Campus Community, Comments, Set Up Comments, Comment Category Table - Set Up SACR, Common Definitions, Comments, Comment Category Table	Set up comment categories that enable you to group comments for similar purposes.

Adding OUAC Organizations

Access the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Organization Table).

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database"

Specifying a Primary Contact and Department for an OUAC Organization

Access the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Organization Table).

Use the Organization Table page to specify an organization's primary contact person or the department to contact in order to streamline your institution's communications with that organization.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database"

Entering OUAC Organization Data

Access the Regional page (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional).

Organization Table

Regional

External Org ID:

000000001



Organization Details

Find | View All

First 1 of 1 Last

Effective Date:

10/17/1997

Status:

Active



Description:

Cottonwood High School

North American Industry Classification System

Customize | Find | View All

First 1 of 1 Last

NAICS

Description





Add

 OUAC Organization Data

Mident Code:

OUAC Institution Code:

Current Enrollment Levels

Grade 9 Enrollment:

Grade 10 Enrollment:

Grade 11 Enrollment:

Grade 12 Enrollment:

OAC Enrollment:

Last Update Date/Time:

by:

Regional page

- Mident Code

Enter the Ontario Ministry of Education six-digit school code.
- OUAC Institution Code

Enter the code that identifies OUAC institutions. When you post OUAC data, the process looks for this code to populate the EXT_ORG_ID field.
- Grade 9 (through 12) Enrollment

Enter the current enrollment levels for the respective grades.
- OAC Enrollment

Enter the total OUAC enrollment.

Entering School Data

Access the School Data page (Campus Community, Organization, Create/Maintain Organizations, Organization School Data).

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database," Entering School-Related Data

Assigning GPA Types to OUAC Organizations

Access the Organization Affiliation page (Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation).

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database," Entering Affiliations with Organizations

Defining School Course Classifications for OUAC

Access the School Course Classification page (Campus Community, Organization, Create/Maintain Organizations, School Course Classification).

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Organization Data," Setting Up External Subject Categories and Term Sessions

Defining the SECSCH Comment Category

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Comments," Setting Up Comment 3C Groups

Chapter 10

Setting Up for Evaluating Applicants

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

This chapter lists prerequisites and discusses how to:

- Set up applicant evaluation.
- Set up student response.

Prerequisites

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

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

Setting up Applicant Evaluation

This section discusses how to:

- Define rating schemes.
- Use the Material Extract Detail Page.
- Assign components to rating schemes.
- Define evaluation codes.
- Define evaluation committees for Admission applications.
- Define evaluation status codes.

Pages Used to Set up Applicant Evaluation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Rating Comp Def Table (rating component definition table)	RATING_COMP_DEF	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Comp Definition Table	Define rating components. Rating components are specific criteria that you use to rate applicants. For example, you could have components such as extracurricular activities, academic preparation, and highest SAT. You use rating components to define rating schemes.
Rating Scheme Table	RATING_SCHEM_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables, Rating Scheme Table	Define rating schemes. The admissions evaluation process uses rating schemes to evaluate applicants. For example, you could have one rating scheme for undergraduate applicants and another for undergraduate engineering applicants. Rating schemes can be defined for manual and automatic evaluations.
Materials Extract Detail	RATING_SCHEME_SP	Click the Extracts button on the Rating Scheme Table page.	Enter the SQCs for your material extracts.
Rating Components Table	RATING_CMP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables, Rating Components Table	Select the rating components that make up your rating scheme. For example, an undergraduate first year rating scheme could consist of components such as overall rating, academic preparation, highest ACT score, highest SAT score, and subjective committee rating. Later, you can assign scores to each component, which can be averaged for an overall score for the rating scheme.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Evaluation Table	EVALUATION_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables, Evaluation Table	Define evaluation codes and the rating schemes linked to them. You must assign evaluation codes—either manually or automatically—to evaluations during the evaluation process. Evaluation codes contain default information that populates fields (such as rating scheme) in the General Evaluation and Application Evaluation components on evaluation pages when you assign an evaluation code to an applicant. Thus, evaluation codes act as templates, making data entry much speedier when creating evaluation records.
Evaluation Committee Table	EVAL_COMMITTEE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables, Evaluation Committee Table	Assign evaluation committees to your evaluation codes (if applicable).
Evaluation Status Table	EVAL_STATUS_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Status Table	Define evaluation status codes. For example, you can set up statuses such as Final, On Hold, and In Progress. Later, when evaluating applicants, you will enter these statuses on evaluation pages as well as on the Application Program Data page under the Application Maintenance menu.

Defining Rating Schemes

Access the Rating Scheme Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables, Rating Scheme Table).

Rating Scheme Table page

Rating Type

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

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

Instructions

Enter information about this rating scheme.

Extracts

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

Using the Material Extract Detail Page

Access the Materials Extract Detail page (Click the Extracts button on the Rating Scheme Table page).

Materials Extract Detail		
	SQC Name	Material Group
Test Score:	ADEXTTST	UGTESTS 
Summary:	ADEXTSUM	UGSUMMR 
Course:	ADEXTCRS	UGCRSES 
Subject:	ADEXTSBJ	UGSUBJCT 
Genl Matl:		

Material Extract Detail page

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

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

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

See [Chapter 15, "Tracking General and Application Materials for Prospects and Applicants," Pages Used to View Summary Application Materials Information, page 193.](#)

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

Assigning Components to Rating Schemes

Access the Rating Components Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Rating Tables, Rating Components Table).

Rating Scheme Table		Rating Components Table	
Academic Institution:	PSUNV	PeopleSoft University	
Rating Scheme:	UGAPPLFYR	UG Applications	
Find View All First ◀ 1 of 1 ▶ Last			
Effective Date:	01/01/1900	Status:	Active
Find View All First ◀ 1 of 7 ▶ Last			
*Rating Component:	1OVER	*Type:	Cumulative
Processing Order:	7	☒ Final Value	
Description:	Overall Rating		
Short Description:	Overall		
		☒ Required	
Find View All First ◀ 1 of 1 ▶ Last			
*Rating Value	*Description	Short Description	

Rating Components Table page

Rating Component

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

Type

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

Processing Order

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

Final Value

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

Required

Select this check box if this component *must* be considered for this rating scheme. For example, you might have a rating scheme that requires the testing component, which looks for a person's highest ACT or highest SAT score. Within this rating scheme you also have separate components for SAT and ACT, but they are *not* marked required. If a component is not marked as required, your rating scheme process continues to the next component if this component does not exist for this applicant. If a component is marked required, the process will not continue if the component is missing. So in our example, there would have to be an ACT or SAT score, but not both, since only the testing component is required.

Method

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

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

Formula ID

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

Rating Value

Enter a numeric rating value if the component is calculated manually. For example, if you want the essay component to be used as part of a committee evaluation, you can assign rating values (such as poor or average) to the essay component, as on the previous page example. When evaluators enter evaluations for these components (on the General Evaluator Detail page or the Application Evaluator Detail page), they can prompt for these rating values.

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

Defining Evaluation Codes

Access the Evaluation Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables, Evaluation Table).

Evaluation Table		Evaluation Committee Table	
Academic Institution:	PSUNV	PeopleSoft University	
Evaluation Code:	UGAPPLFYR		
*Description:	UG Applicants		
Short Description:	UG Appl		
*Evaluation Type:	Application ▼		
Committee Rating ID:	UGCOMMFYR 🔍	UG Application Committee	
Overall Rating ID:	UGAPPLFYR 🔍	UG Applications	
Comments:	Up Down		

Evaluation Table page

Evaluation Type

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

Committee Rating ID

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

Overall Rating ID

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

Defining Evaluation Committees for Admission Applications

Access the Evaluation Committee Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Tables, Evaluation Committee Table).

Evaluation Table		Evaluation Committee Table	
Academic Institution:	PSUNV	PeopleSoft University	
Evaluation Code:	UGAPPLFYR	UG Applicants	
Find View All First 1 of 1 Last			
*Committee:	UGEV01	UG Admissions Committee	
Comments:			
Find View All First 1-2 of 2 Last			
*Evaluator ID		*Role	
AD1040	Sullivan,Irving	STAF	Adm Staff
AD1041	Dern,Bill	STAF	Adm Staff

Evaluation Committee Table page

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

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

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Committee Data"

Defining Evaluation Status Codes

Access the Evaluation Status Table page (Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Evaluation Status Table).

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

Setting Up Student Response

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

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

This section discusses how to enable student response for a school type.

See Also

[Chapter 17, "Adding and Updating Applications," Updating Applications, page 254](#)

Page Used to Set Up Student Response

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

Enabling Student Response for a School Type

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

See Also

[Chapter 3, "Setting Up Prospects," Setting Up School Types, page 32](#)

Chapter 11

Setting Up Admissions Program Actions and Program Action Reasons

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

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

Setting Up Admissions Program Actions and Program Action Reasons

This section discusses how to:

- Review admissions program action values.
- Define admissions program action reason values.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Admissions Action Table	ADM_ACTION_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Admissions Action Table	View admissions program actions.

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

Reviewing Admissions Program Action Values

Access the Admissions Action Table page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Admissions Action Table).

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

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

Defining Admissions Program Action Reason Values

Access the Program Action Reason Table page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Program Action Reason Table).

Program Action Reason Table

SetID: PSUNV

Program Action: WADM Administrative Withdrawal

Action Reason: DEAT

Find | View All

First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Deceased

Short Description: Deceased

Program Action Reason Table page

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

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

Chapter 12

Recruiting Prospective Students

This chapter lists prerequisites and discusses how to:

- Add prospects through the Create/Update Prospects component.
- Create prospects when posting external test scores.
- Create prospects from test scores with query.
- Add prospects through a system-wide query.
- View prospect information.
- Assign regions, recruiting categories, and recruiters on a mass basis.

Understanding Adding Prospects

You can add prospects to your system:

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

See [Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 25.](#)

4. In a group, for all individuals within a single posting of test scores.
5. In a group, by creating a user-defined query of individuals who have posted test scores from previous test score loads.
6. In a group, by creating a user-defined query of individuals in your system.

Prerequisites

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

See [Chapter 2, "Building Your Recruiting Structure," page 7.](#)

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Setting Up Search/Match."

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

Adding Prospects Through the Create/Update Prospects Component

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

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

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

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

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

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

- Biographical details.
- Regional data.
- Academic career data.
- Academic program data.
- School and recruiting data.
- Event attendance.
- Event meeting information.
- Communications, checklists and comments.

Pages Used to Add Prospects

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

Entering and Updating Prospect Biographical Details

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Managing Biographical Information," Understanding Biographical Information.

Entering and Updating Prospect Regional Data

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Designing Campus Community," Setting Up Regulatory Regions.

Entering and Updating Prospect Academic Career Data

Access the Prospect Career Data page (Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect Career Data).

Biographical Details	Regional	Prospect Career Data	Prospect Program Data	Prospect School/Recruiting
Ronald Greene		AA0037		
Academic Career: Undergraduate		Institution: PSUNV		
☐				
Admit Term:	0450	2001 Fall	☒ Applied	
Admit Type:	FYR	First-Year		
Campus:	MAIN	Main Hacienda Campus		
Academic Load:	Full-Time			
Academic Level:	Freshman			
Housing:				
☒ Financial Aid Interest				
Recruiting Information				
*Recruiting Status:	Applicant	Referral Source:		
Status Date:	03/27/2001	Source Date:	03/27/2001	
Created On:	03/27/2001	*Recruiting Center:	UGRD Undergrad	
Transfer To: Education		Go		

Prospect Career Data page

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

Admit Term	Enter the admit term for the prospect's career. Define admit terms on the Term Table page. (user defaults)
Admit Type	Enter the prospect's admit type for this career. Define admit types on the Admit Type Table page. (user defaults)
Campus	Enter a campus to associate the prospect to a specific campus. Define campuses on the Campus Table page. (user defaults)
Academic Load	Select the appropriate academic load for this career. Values for this field are delivered with your system as translate values. You can modify these translate values.
Academic Level	Select the academic level for this career. Values for this field are delivered with your system as translate values. You can modify these translate values. (user defaults)

Housing	Select any housing interest that this person indicated. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Commuter</i> , <i>Off Campus</i> , and <i>On Campus</i> . This field is for informational purposes. (user defaults)
Financial Aid Interest	Select to indicate that this prospect has an interest in financial assistance. This field is for informational purposes only. (user defaults)
Applied	The system automatically updates this check box when the prospect applies to your institution if, on the Installation Defaults - AD page, you set up the system to update prospect records when prospects become applicants.
Recruiting Status	Select the person's recruiting status. The recruiting status indicates the level of interest, at the academic career level, that your institution has in the prospective student. For example, you might consider a person who attended an on-campus event a suspect (someone who you <i>suspect</i> is interested in your institution). Conversely, you might consider a person who sends a prospect card a prospect (someone who you know is interested in your institution). This field is also helpful for targeting mass mailings. Values for this field are delivered with your system as translate values. These translate values can be modified. Values are <i>Applicant</i> , <i>Inactive</i> , <i>Inquiry</i> , <i>Prospect</i> , and <i>Suspect</i> .
Status Date	Enter the date, if different than the default date, on which you entered or updated the recruiting status. The default date is the system date on the day the record was added.
Created On	Enter the date, if different than the default date, on which this prospect record was created. The default date is the system date on the day the record was added.
Referral Source	Enter the appropriate referral source for this prospect. A referral source indicates how this person became a prospect. The referral source is a high level indicator of how your institution came into contact with the person. For example, a referral source could be <i>Drop-In</i> , <i>Campus Event</i> , or <i>College Fair</i> . Although this is a way to track your first contact with this person, record subsequent contacts with the Communications pages. Define referral sources on the Referral Source Table page.
Source Date	Enter the date, if different than the default date, on which you entered this referral source. The default date is the system date on the day the record was added.
Recruiting Center	Enter the recruiting center that is responsible for this prospect's career. Define recruiting centers on the Recruiting Center Table page. The values depend on the academic career that you select and are subject to user security established for recruiting centers. (user defaults)
Go	Click this button to go to another component for this prospect record.

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

Entering and Updating Prospect Academic Program Data

Access the Prospect Program Data page (Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect Program Data).

Biographical Details Regional Prospect Career Data **Prospect Program Data** Prospect School/Recruiting

Ronald Greene AA0037

Academic Career: Undergraduate **Institution:** PSUNV

Program Data Find | View All First 1 of 1 Last

*Academic Program: FAU Fine Arts Undergraduate

Campus: MAIN Main Hacienda Campus

Program Recruiting Information

*Recruiting Status: Applicant Application Number: 00022830

Status Date: 03/27/2001 *Recruiting Center: UGRD Undergrad

Plan Data Find | View All First 1 of 1 Last

*Academic Plan: ART Art (BFA) Major BFA

Sub-Plan Data Find | View All First 1 of 1 Last

*Sub-Plan:

Transfer To: Education Go

Prospect Program Data page

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

Note. Prospect records use the Last Prospect Date to determine if the program, plan, or subplan should appear in the prompts. If the Last Prospect Date is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the date is less than or equal to the current date, the system does not display the value in the prompt.

Recruiting Status	Select the recruiting status for this program. Depending on your settings on the Installation Defaults - AD page, the system can update the recruiting status when the person applies to your institution. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Applicant</i>, <i>Inactive</i>, <i>Inquiry</i>, <i>Prospect</i>, and <i>Suspect</i>. By tracking recruiting information at the academic program level, you can designate a recruiting status that is different than the status that is designated at the academic career level.
Status Date	The status date is the system date on the day that you last modified the Recruiting Status field.
Application Number	If the prospect applies to this academic program, the system automatically updates the application number.
Recruiting Center	Enter the recruiting center that is responsible for this particular program for the prospect. Define recruiting centers on the Recruiting Center Table page. (user defaults)
Academic Plan and Sub-Plan	Enter an academic plan and subplan, if known. You can enter multiple academic plans for a program and multiple subplans under an academic plan. Define academic plans in the Academic Plan Table component and academic programs in the Academic Program Table component (user defaults).

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

Entering and Updating Prospect School and Recruiting Data

Access the Prospect School/Recruiting page (Student Recruiting, Maintain Prospects, Create/Update Prospects, Prospect School/Recruiting).

Biographical Details	Regional	Prospect Career Data	Prospect Program Data	Prospect School/Recruiting
Ronald Greene		AA0037		
Academic Career: Undergraduate		Institution: PSUNV		
Events				
School Information				
Last School Attended: 000000001		Cottonwood High School		
Graduation Date: 05/15/2001				
School Type: Secondary		Proprietorship: Public		
City: Salt Lake City		State: UT		Country: USA
Recruiting Information				
Region:		Assign Region From Home Postal Code School Postal Code		
From:				
Primary Recruiter ID:				
Recruiting Categories Find View All First 1 of 1 Last				
*Category:		Group:		
Sub-Category:		☐ Move to Application		
Description:				
Recruiters Find View All First 1 of 1 Last				
Recruiters Prompt		*Recruiter ID		Recruiter Type Primary
☒ Recruiters				+ -
Transfer To: Education Go				

Prospect School/Recruiting page

Events

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

School Information

Last School Attended

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

Graduation Date

Enter the graduation date from the last school that the person attended. (user defaults).

Recruiting Information

Region	You can assign a recruiting region manually or automatically. To manually assign a region, click the prompt on the Region field and enter as value. Define regions on the Region Table page.
Home Postal Code	Click this button to automatically assign the recruiting region, based on the home postal code of the prospect. Assigning recruiting regions based on home address postal codes requires that you define the region tree.
School Postal Code	Click this button to automatically assign the recruiting region, based on the postal code of the primary location of the prospect's last school attended. Assigning recruiting regions based on school postal codes requires that you define the region tree. See Chapter 2, "Building Your Recruiting Structure," Setting Up Your Recruiting Structure, page 7.
From	This display-only field shows you how this region was defined: <i>Region Tree</i> appears if you <i>manually</i> assigned a region. <i>Address</i> appears if you assigned the region when you click the Home Postal Code button. <i>School</i> appears if you assigned the region when you click the School Postal Code button. See Chapter 2, "Building Your Recruiting Structure," Defining Recruiters, page 17.

Recruiting Categories

Category	Enter a recruiting category for the prospect within this career. In our example, the prospect's sibling attended the institution. Define recruiting categories on the Recruiting Category Table page. Use categories to target and report on students. You can enter multiple recruiting categories and prospect supporting information for each career. Note. If you plan to assign a regional recruiter to this prospect, you must enter a category of <i>REGN</i> (region).
Sub-Category	Select a recruiting subcategory, if known. Subcategories can indicate the priority of this recruiting category. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are (<i>none</i>), <i>High</i> , <i>Low</i> , and <i>Medium</i> .
Group	The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the Category field.

Move to Application

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

Recruiters

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

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

Recruiters Prompt

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

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

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

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

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

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

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

Recruiter ID

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

Recruiter Type

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

Primary	Select this check box if this is the primary recruiter for this academic career. This ID appears on the Prospect School/Recruiting page in the Primary Recruiter ID field. You can also enter both primary and non-primary recruiters using this option.
Go	Click this button to go to another component for this prospect record.

Tracking Prospects Event Attendance

Access the Attendee Events page (Click the Events link on the Prospect School/Recruiting page).

Attendee Events						
Events						
		Customize Find		First ◀ 1 of 1 ▶ Last		
*Event ID	Description	Short Description	Attendee	Meeting		
000010005	Open House	Open House	00000	Meeting		

Attendee Events page

Event ID	Enter the ID for the event that the prospect is attending (or attended).
Description, Event Type, and Attendee	The system displays the description, event type, and attendee when you select the event ID.
Meeting	Click this button to access the Attendee Meetings Page and view a list of meetings or sessions that are associated with this event.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Campus Event Planning," Creating an Event

Recording Event Meeting Information

Access the Attendee Meetings page (Click the Meetings button on the Attendee Events page).

Attendee Meetings						
Meetings						
		Customize Find		First ◀ 1 of 1 ▶ Last		
*Event Mtg	Description	Meeting Date	Meeting Start Time	Meeting End Time	Status	
2	Information Session				Invited	

Attendee Meetings page

Event Mtg (event meeting),
Description, Meeting Date,
Meeting Start Time,and
Meeting End Time

Enter the event meeting number. The system then displays the event description, meeting date, meeting start time, and meeting end time.

Status

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

Adding Communications, Checklists and Comments for Prospects

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

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

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Using the 3C Engine"

Creating Prospects When Posting External Test Scores

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

1. Load the test scores into a suspense table.

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

See [Chapter 20, "Processing External Test Scores," Understanding Performing Search/Match and Posting Test Scores, page 371.](#)

Prerequisites

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

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

See Also

[Chapter 8, "Setting Up External Test Score Loads," Mapping External Tests IDs, page 77](#)

Creating Prospects from Test Scores with Query

This section provides an overview and discusses how to:

- Create prospects by querying external test loads.
- Select a query.

Understanding Creating Prospects from Test Scores with Query

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

1. Create a query.

To access Query Manager, select Reporting Tools, Query.

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

To create a query for prospects, you must:

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

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

- Employee ID must be the first field that is listed on the Fields page in PeopleSoft Query Manager.

You can select additional fields to enhance the results of your query as long as the Employee ID is the first field that is listed.

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Query

Prerequisites

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

1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure Ethnicity Mapping.

5. Post test score data.
6. (optional) Configure Test ID mapping options for academic interests, extracurricular activities, and religious preference.

Pages Used to Add Prospects From Test Scores Using Query

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

Creating Prospects by Querying External Test Loads

Access the Create Prospects from Tests page (Student Admissions, External Test Score Processing, Create Prospects From Tests).

Create Prospects from Tests

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

*Test ID: GRE Graduate Record Exam

Default Prospect Values

*Academic Institution:	PSUNV	PeopleSoft University
*Academic Career:	GRAD	Graduate
Campus:	MAIN	Main Hacienda Campus
*Recruiting Status:	Inquiry	
*Recruiting Center:		
Referral Source:	TSCR	Test Scores
Admit Type:	FYR	First-Year
Admit Term:	0550	2005 Fall
Academic Level:	Graduate	
Academic Program:	GLAU	Graduate Liberal Arts Programs
Academic Plan:	ENGL-MA	English (MA)
Academic Sub-Plan:		
☒ Assign 3C		
Event ID:	NEWPROP	New Prospect - PROP

Prospect Select Query

Query Name:	None	Select Query

Create Prospects from Tests page

Note. Prospect records use the Last Prospect Date to determine if the program, plan, or subplan should appear in the prompts. If the Last Prospect Date is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the date is less than or equal to the current date, the system does not display the value in the prompt.

Additional Elements

Test ID

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

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

Default Prospect Values

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

Academic Program

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

Assign 3C

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

Event ID

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

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Defining 3C Engine Events.

Prospect Select Query

Select Query

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

Selecting a Query

Access the Select Query page (Click the Select Query button on the Create Prospects from Tests page).

Select Query

Search By:

Search Results

Query	Customize	Find	View All	First	1-3 of 3	Last
Query Name	Descr	Owner				
PS AD ACT CPTTEST02	Create Prospect 02	Public				
PS AD ACT CPTTEST03	Create Prospect ACT 03	Public				
PS AD ACT CPTTEST04	ACT Create Prospects 04	Public				

Select Query page

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

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Query

Adding Prospects Through a System-wide Query

This section discusses how to:

- Add prospects through a system-wide query.
- Select a query.

Understanding Queries and Prospect Creation

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

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

3. Select and run the query that you created from the Create prospects from Query page.

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Query

Pages Used to Add Prospects Through a System-wide Query

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

Adding Prospects Through a System-wide Query

Access the Create Prospects from Query page (Student Recruiting, Maintain Prospects, Create Prospects from Query).

Create Prospects from Query

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

Default Prospect Values		
*Academic Institution:	PSUNV	PeopleSoft University
*Academic Career:	MEDS	Medical School
Campus:	MAIN	Main Hacienda Campus
*Recruiting Status:	Inquiry	
*Recruiting Center:	MEDS	Medical School
Referral Source:	MEDA	Medical School Advisor
Admit Type:	MED	Medical First Year
Admit Term:	0530	2004 Fall
Academic Level:	Graduate	
Academic Program:	MED	Medicine
Academic Plan:	MEDICINE	Medicine
Academic Sub-Plan:		
☒ Assign 3C		
Event ID:	NEWPROP	New Prospect - PROP

Prospect Select Query	
Query Name:	Select Query

Create Prospects from Query page

Note. Prospect records use the Last Prospect Date to determine if the program, plan, or subplan should appear in the prompts. If the Last Prospect Date is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the date is less than or equal to the current date, the system does not display the value in the prompt.

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

Selecting a Query

Access the Select Query page (Click the Select Query button on the Create Prospects from Query page).

See Also

[Chapter 12, "Recruiting Prospective Students," Selecting a Query, page 131](#)

Viewing Prospect Information

This section discusses how to view prospect information.

Pages Used to View Prospect Information

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

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

This section provides an overview and discusses how to:

- Use general criteria to select the prospect group.

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

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

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

- Biographical and demographic data, such as gender, ethnicity, and citizenship.
- Address data, such as state and postal codes, or a range of postal codes.
- Geographic region, based on last school attended, prospect's home address, or the region tree.
- Academic institution, last school attended, academic career, program, plan, and campus.
- Recruiting status and recruiting center.
- Other items, such as referral source, academic interest, housing interest, and financial aid interest.

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

See Also

[Chapter 12, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 116](#)

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

Page Name	Definition Name	Navigation	Usage
General Selection Crit (general selection criteria)	ADM_PERS_CAR_PARMS	Student Recruiting, Assign Recruiters, Recruiter Assignment, General Selection Crit	Use the General Selection Crit (general selection criteria) page to specify the prospect group for which you want to assign regions, recruiting categories, and recruiters.

Page Name	Definition Name	Navigation	Usage
Academic Selection Crit (academic selection criteria)	ADM_CAR_PARS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Academic Selection Crit	Enter any academic selection criteria for the prospect group.
Prog/Plan Selection Crit (program or plan selection criteria)	ADM_PROGRAM_PARS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Prog/Plan Selection Crit	Enter any academic program or academic plan selection criteria for the prospect group.
Acad Interests Selection Crit (academic interests selection criteria)	ADM_INTEREST_PARS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Acad Interests Selection Crit	Enter any subject area selection criteria for this prospect group. You can select people for prospect groups that have expressed an academic interest in certain subject areas if you want to assign regions, recruiting categories, and recruiters based on this criteria.
Assignment Crit (assignment criteria)	ADM_RECRREGN_PARS	Student Recruiting, Assign Recruiters, Recruiter Assignment, Assignment Crit	Assign regions, recruiting categories, and recruiters to the prospect group.

Using General Criteria to Select the Prospect Group

Access the General Selection Crit (general selection criteria) page (Student Recruiting, Assign Recruiters, Recruiter Assignment, General Selection Crit).

General Selection Crit		Academic Selection Crit		Prog/Plan Selection Crit		Acad Interests Selection Crit			
Run Control ID: 1				Report Manager		Process Monitor		Run	
Academic Selection									
*Institution:		GLAKE		Glake		Academic Career:		UGRD	
Last School Attended:		000000001		Cottonwood High School					
Bio/Demo Selection					Address Selection				
Gender:		Male			Country:		USA		
Citizenship Country:		USA			State:		CA		
Citizenship Status:		Native			Postal Code		☐ Begins With		
Marital Status:		Single					From:		
					☐ Equals				
					☐ Range				
					☒ N/A				
					To:				
Region Selection									
☒ N/A ☐ Blank ☐ Non-Blank									
Ethnic Group Selection									
Regulatory Region		USA							
Ethnic Groups									
Customize Find View All First 1 of 1 Last									
	*Ethnic Group	Description							
1									+ -

General Selection Crit page

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

Academic Selection

Institution and Academic Career

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

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

Last School Attended	Enter the last school attended to assign regions, recruiting categories, and recruiters based on this criterion.
Bio/Demo Selection	
Gender	Select <i>(none)</i> , <i>Female</i> , <i>Male</i> , or <i>Unknown</i> to assign regions, recruiting categories, and recruiters based on this criterion.
Citizenship Country	Enter a county of citizenship.
Citizenship Status	Select a citizenship status to assign regions, recruiting categories, and recruiters based on this criterion. You must specify a country of citizenship for values to exist for this field.
Marital Status	Select a marital status to assign regions, recruiting categories, and recruiters based on this criterion.

Address Selection

CountryandState	Enter the country and state to assign regions, recruiting categories, and recruiters based on these criteria.

Postal Code

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

Begins Withand From	Select a prospect group by defining a beginning postal code. Enter the beginning postal code in the From field. For example, use this option if one prospect has a five-digit postal code (90068) and another prospect has a nine-digit version of the postal code Using a postal code that begins with 90068 finds both prospects.
Equals	Select this option to choose a prospect group by a specific postal code. Enter the postal code in the From field.
Range, From, and To	Select <i>Range</i> to select a prospect group by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.
N/A	Select <i>N/A</i> if you do not want to use a postal code in your selection criteria for this prospect group. This is the default setting.

Region Selection

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

N/A	Select this option if you do not want to use region in your selection criteria for this prospect group.
Blank	Select this option to select people for a prospect group who do not have a region assigned.
Non-Blank	Select this option to select prospects who have been assigned a geographical region.

Ethnic Group Selection

Complete fields in this group box if you want to assign regions, recruiting categories and recruiters to a group of prospects based on specific ethnic groups.

Regulatory Region	Select the region for which the ethnic groups are defined. Once this field is populated, the Ethnic Group field will appear.
Ethnic Group	Select one or more ethnic groups to assign regions, recruiting categories, and recruiters based on this criterion. The values for this field will vary based on the regulatory region entered.

Using Academic Criteria to Select the Prospect Group

Access the Academic Selection Crit (academic selection criteria) page (Student Recruiting, Assign Recruiters, Recruiter Assignment, Academic Selection Crit).

General Selection Crit		Academic Selection Crit		Prog/Plan Selection Crit		Acad Interests Selection Crit	
Run Control ID: 1		Report Manager		Process Monitor		Run	
Admit Term:	0505	2003 Fall	Acad Load:	Full-Time			
Admit Type:	FYR	First Year	Acad Level:	1st Year			
Campus:	MAIN	Main Campus					
Recruiting Information							
Recruiting Status:	Applicant	Referral Source:	APPL	Applicatn			
Created On:		Recruiting Center:	UCTR	Recruiting			
Housing:	On Campus						
Selection Criteria For Fin Aid							
☒ Interested in Fin Aid ☐ Not Interested in Fin Aid ☐ Not Applicable							

Academic Selection Crit page

Admit Term	Enter the admit term for this career and prospect group to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career n the General Selection Crit page.
Admit Type	Enter the admit type for this career to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career on the General Selection Crit page.
Campus	Enter a campus to assign regions, recruiting categories, and recruiters based on this criterion.
Acad Load (academic load)	Select the appropriate academic load for this career to assign regions, recruiting categories, and recruiters based on this criterion. Values depend upon the academic career entered on the General Selection Crit page.
Acad Level (academic level)	Select an academic level for this career to assign regions, recruiting categories, and recruiters based on this criterion.
	Note. If you have not entered an academic institution and an academic career on the General Selection Crit page, there are no prompt values for these fields.
Recruiting Status	Select the recruiting status to assign regions, recruiting categories, and recruiters based on this criterion.
Created On	Enter the date that prospect records were created to assign regions, recruiting categories, and recruiters based on this criterion.

Referral Source	Enter the referral source to assign regions, recruiting categories, and recruiters based on this criterion.
Recruiting Center	Enter the recruiting center to which prospects in this career are assigned to assign regions, recruiting categories, and recruiters based on this criterion.
Housing	Select a housing interest for this prospect group to assign regions, recruiting categories, and recruiters based on this criterion.
Interested in Fin Aid (interested in financial aid)	Select this option to select a prospect group by those who indicate an interest in financial aid.
Not Interested in Fin Aid (not interested in financial aid)	Select this option to select a prospect group by those who have specified that they are not interested in financial aid.
Not Applicable	Select this option to selects a prospect group regardless of their expressed interest in financial aid. This is the default setting.

Using Program and Plan Criteria to Select the Prospect Group

Access the Prog/Plan Selection Crit (program or plan selection criteria) page (Student Recruiting, Assign Recruiters, Recruiter Assignment, Prog/Plan Selection Crit).

Prog/Plan Selection Crit page

Academic Program

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

Campus

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

Recruiting Status

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

Recruiting Center

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

Academic Plan

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

Using Academic Interests Criteria to Select the Prospect Group

Access the Acad Interests Selection Crit (academic interests selection criteria) page (Student Recruiting, Assign Recruiters, Recruiter Assignment, Acad Interests Selection Crit).

General Selection Crit | Academic Selection Crit | Prog/Plan Selection Crit | **Acad Interests Selection Crit** | ▶

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

☐ Priority ☒ Non-Priority ☐ Not Applicable

Find | View All | First ◀ 1 of 1 ▶ Last

----- Priority -----

*Subject Area

HIST 🔍 History

From To Qty

□ □ + -

Acad Interests Selection Crit page

Priority	Select this option to select prospects who have expressed a prioritized interest in certain subject areas.
Non-Priority	Select this option to select prospects who have not expressed a prioritized interest in certain subject areas.
Not-Applicable	Select this option to select prospects regardless of their expressed interest in any subject area. This is the default option.
Subject Area	Enter individuals for a prospect group who have expressed an academic interest in a common subject area. This field is optional and is based on the options that you selected (<i>Priority</i> , <i>Non-Priority</i> , or <i>Not-Applicable</i>). You can enter more than one subject area. For example, if you enter <i>English</i> and <i>Math</i> as subject areas, the system selects those people who have expressed an interest in either English or Math for this prospect group. Therefore, the OR logic applies; one or the other must be true for that person to be selected. Contrast this to the AND logic discussed in the Bio/Demo Selection group box on the first page in this component.
From and To	Enter an academic interest priority range. For example, you can select people for this prospect group who have expressed an interest in pre-law as their first or second interest choice. These fields are relevant only if you selected the Priority option.

See Also

Chapter 13, "Tracking Supporting Prospect and Applicant Information," Pages Used to Track Supporting Information for Prospects and Applicants, page 150

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

Access the Assignment Crit (assignment criteria) page (Student Recruiting, Assign Recruiters, Recruiter Assignment, Assignment Crit).

Assignment Crit page

Assignment Selection

Regions and Categories/Recruiters

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

Region From

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

School

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

Address

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

Region Tree

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

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

Recruiting Categories

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

Category	Enter a recruiting category for this prospect group (for example, <i>HTST</i> (high test scores). You can assign multiple recruiting categories. Define recruiting categories on the Recruiting Category Table page. Use these categories in the recruiting and application processes to target and report on students.
Sub-Cat (subcategory)	Select a recruiting subcategory, if known. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are (<i>none</i>), <i>High</i> , <i>Low</i> , and <i>Medium</i> . You can use a subcategory to indicate the priority of this recruiting category.
Existing Recrs (existing recruiters)	Select an option for handling existing recruiters for people in this prospect group. You can merge them or replace them with the recruiters that you are currently assigning. <i>Merge</i> appears by default.
Move to Application	Select this check box to carry forward the recruiting categories to the application records when individuals in this prospect group apply to your institution. However, you must set up your installation defaults to allow the system to copy the recruiting category. Select the Recruiting Categories check box on the Installation Defaults - AD page.

Multiple Recruiters - Assign

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

All	Select this option to assign to this prospect group all of the region's recruiters in the region that you define.
One	Select this option to assign to this prospect group one of the region's recruiters in the region that you define. The system assigns the first recruiter who is assigned to this recruiting category.
None	Select this option to assign no recruiters if there are multiple recruiters for this category.

Recruiters**Prompt Category**

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

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

Recruiter ID

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

Primary

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

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

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

Chapter 13

Tracking Supporting Prospect and Applicant Information

This chapter lists prerequisites and discusses how to:

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

Note. Recruiting and Admissions shares functionality with PeopleSoft Campus Community. For this reason, many of the pages covered in this chapter are documented in their entirety in *PeopleSoft Campus Community Fundamentals 9.0 Peoplebook*

Prerequisites

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

See Also

[Chapter 17, "Adding and Updating Applications," page 211](#)

[Chapter 12, "Recruiting Prospective Students," Adding Prospects Through the Create/Update Prospects Component, page 116](#)

Tracking Supporting Information for Prospects and Applicants

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

- Academic interests.
- Electronic addresses.
- Extracurricular activities.

- Honors and awards.
- Languages.
- Names.
- Publications.
- Relations with your institution.
- Relationships.
- Residency data.
- Student group involvement.
- Work experience.
- Test results.
- Test summary information.

Pages Used to Track Supporting Information for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Academic Interests	ADM_INTERESTS	• Student Recruiting, Maintain Prospects, Academic Information, Academic Interests • Student Admissions, Application Entry, Academic Information, Academic Interests	Record a person's external subject areas of interest, whether your institution offers them. You can also record the person's level of academic interest. For example, Pre-Law could be a person's first priority and Technology could be the person's second priority. You can use this information for recruiting purposes by determining what areas you offer that are similar to the person's preferences. This information is also valuable for reporting and academic program planning purposes.

Page Name	Definition Name	Navigation	Usage
Test Results	STDNT_TEST_SCORE	• Student Recruiting, Maintain Prospects, Academic Information, Test Results • Student Admissions, Application Entry, Academic Information, Test Results • Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results • Records and Enrollment, Transfer Credit Evaluation, Test Results	Enter test scores and related test information for a person manually. You can also load various test information into this page through an external test score load. Test results are stored under a person's name and can be used when evaluating any application for the person. Link test scores to an application on the Application Materials page.
Test Summary	STDNT_TEST_SUMMARY	• Student Recruiting, Prospect Summaries, Academic Test Summary • Student Admissions, Applicant Summaries, Academic Test Summary • Records and Enrollment, Transfer Credit Evaluation, Academic Test Summary • Student Recruiting, External Test Score Processing, Academic Test Summary or Student Admissions, External Test Score Processing, Academic Test Summary	View a summary of academic test information for prospects and applicants. This page includes information such as test score and data source.

Tracking Academic Interests for Prospects and Applicants

Access the Academic Interests page (Student Recruiting, Maintain Prospects, Academic Information, Academic Interests).

Academic Interests

Jane Smith AD5023

Academic Career: Undergraduate

Subject Sort Options Find | View All First 1 of 1 Last

*Effective Date: 10/31/2004 ☒ Use Priority

Subject Area	Description	Data Source	Priority
BIOL	Biology	Self-Rpted	1

Academic Interests page

- Effective Date** Enter the effective date if it is different than the current date. The current date is the default. The effective date defines when the information you enter is valid.
- Use Priority** Select this check box to prioritize a person's academic interests.
The default for this field is selected if you enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.
- Subject Area** Enter a subject area. Define external subject areas on the External Subject Table page.
- Description** The description for this subject appears.
If the person expressed an interest for which no subject area code is defined, leave the Subject Area field blank and enter a free-form.
- Data Source** Select a value to indicate how this information was provided to your institution. For example, you might have received this information directly from the applicant or through a data load. Values for this field are delivered with your system as translate values. You can modify these translate values.
- Priority** Enter a priority level (for example 1, 2, 3). 1 is the highest priority.
The default for this field is selected if you have enabled the Use Priority Academic Interest feature on the Installation Defaults - AD page.
- Go** Click this button to go to another component.

Tracking Electronic Addresses for Applicants

Use the Electronic Addresses page to enter or update electronic addresses for a person. To navigate to the Electronic Addresses page, select Campus Community, Personal Information, Biographical, Addresses/Phones, Electronic Addresses.

See *PeopleSoft Campus Self Service 9.0 PeopleBook*, "Understanding PeopleSoft Campus Self Service."

Tracking Extracurricular Activities for Prospects and Applicants

Use the Extracurricular Activities page to record information regarding a person's external interests. To navigate to the Extracurricular Activities page, select Campus Community, Personal Information, Participation Data, Extracurricular Activities.

Tracking Honors and Awards for Prospects and Applicants

Use the Honors and Awards page to record a prospect's or applicant's honors and awards. For example, an external honors could be National Merit Finalist or Valedictorian. Internal honors and awards could be a scholarship for an incoming applicant or the Dean's List for a matriculated student. To navigate to the Honors and Awards page, select Campus Community, Personal Information, Participation Data, Accomplishments, Honors and Awards.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "Tracking Student Data," Tracking Honors and Awards

Tracking Languages for Prospects and Applicants

Use the Languages page to enter, update, and view language proficiency information. To navigate to the Languages page, select Campus Community, Personal Information, Biographical, Personal Attributes, Languages.

Tracking Names for Prospects and Applicants

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

To navigate to the Names page, select Campus Community, Personal Information, Biographical, Names.

See [Chapter 12, "Recruiting Prospective Students," Entering and Updating Prospect Biographical Details, page 117.](#)

Tracking Publications for Prospects and Applicants

Use the Publications page to enter, update, and review publication information. For example, a person might have written a book, produced a video, or published a thesis. To navigate to the Publications page, select Campus Community, Personal Information, Participation Data, Accomplishments, Publications.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Participation Data," Entering Publications Data

"Research Tracking Additions to Admissions Functionality" document in the Recruiting and Admissions documentation package for Bundle 24 (CS_Bundle_24_Recruiting_and_Admissions_9_0.pdf). This package is available on My Oracle Support (CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 - Doc ID 1400708.1).

Tracking Relations with Your Institution for Prospects and Applicants

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information," Managing Relationships Data

Tracking Relationships for Prospects and Applicants

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information," Managing Relationships Data

Tracking Residency Data for Prospects and Applicants

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

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Personal Identification Data," Entering Residency Data

Tracking Student Group Involvement for Prospects and Applicants

Use the Student Groups page to enter any student groups that your institution has defined to which this person belongs. To navigate to the Student Groups page, select Records and Enrollment, Career and Program Information, Student Groups.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "Tracking Student Data," Tracking Student Groups

Tracking Work Experience for Prospects and Applicants

Use the Work Experience page to enter, update, and review work experience information you might have for a person. To navigate to the Work Experience page, select Campus Community, Personal Information, Biographical, Work Experience.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information," Tracking Work Experience

"Research Tracking Additions to Admissions Functionality" document in the Recruiting and Admissions documentation package for Bundle 24 (CS_Bundle_24_Recruiting_and_Admissions_9_0.pdf). This package is available on My Oracle Support (CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 - Doc ID 1400708.1).

Tracking Test Results for Prospects and Applicants

Access the Test Results page (Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results).

Test Results

Ronald Greene AA0037

Tests Find | View All First 1 of 1 Last

*Test ID: GRE Graduate Record Exam ☐ Checklist Item Update

Defaults for Components

Test Date: 09/09/2004 Data Source: ETS Acad Level: Master

Test Components Customize | Find | View All First 1-3 of 3 Last

	*Component	Score	%tile	*Test Date	*Data Source	*Acad Level	Letter Score	Date Loaded	Index	Std Admin		
1	VERB	710.00	97	09/09/2004	ETS	Master		09/09/2004		☒	+	-
2	QUAN	630.00	53	09/09/2004	ETS	Master		09/09/2004		☒	+	-
3	WR	5.50	86	09/09/2004	ETS	Master		09/09/2004		☒	+	-

Test Results page

Test ID

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

Checklist Item Update

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

Test Date

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

Data Source

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

Acad Level (academic level)

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

Component

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

Score %tile (score percentile)

Enter the score, percentile, or both for this test component.

Test Date

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

Data Source	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Acad Level	The system automatically populates this field from the value you entered in the Defaults for Components group box. You can edit the value if necessary.
Letter Score	Enter a letter score for this test component, if applicable.
Date Loaded	The default for the loaded date is your system date. Edit this field if necessary. If this information is electronically loaded, this field is automatically populated with your system date the day the data is loaded.
Index	The LSAT 3-Year Test Index appears if this information has been loaded.
Std Admin (standard administration)	The system selects this check box by default, which indicates that this test was administered in a standard way. Clear this check box if the test was administered in a nonstandard or non-timed way.
Go	Click this button to go to another component for this record.

Viewing Academic Test Summary Information for Prospects and Applicants

Access the Academic Test Summary page (Student Recruiting, External Test Score Processing, Academic Test Summary or Student Admissions, External Test Score Processing, Academic Test Summary).

Academic Test Summary

Ronald Greene
AA0037

Test Summary by ID/Component

Test ID:
Test Component:

Sort By

☒ Date
☐ Score
☐ Test

Customize Find View All First 1-3 of 3 Last									
	Test ID	Description	Score	%tile	Test Dt	Std Admin	Acad Level	Data Srce	Dt Loaded
1	GRE	Quantitative	630.00	53	09/08/2004	☒	Master	ETS	09/09/2004
2	GRE	Verbal	710.00	97	09/08/2004	☒	Master	ETS	09/09/2004
3	GRE	Writing	5.50	86	09/08/2004	☒	Master	ETS	09/09/2004

Academic Test Summary page

Test ID and Test Component	Enter the test ID and test component about which you want to view summary information.
Date, Score, or Test	Select the order in which you want the summary information to appear (for example, by date, score or test).

Search

Click to access information that matches your search criteria.

Viewing Event and Meeting Summary Information

Use the Person Event Summary page to look up summary information regarding events and meetings for any prospect or applicant in your database. To navigate to the Person Event Summary page, select Campus Community, Campus Event Planning, View Event Information, Person Event Summary.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Campus Event Planning," Reviewing Events, Meetings, and Attendees

Viewing Schools by Groups

Use the Organization Groups Summary page to view schools or any type of organization, in groups you designate. You can display the list in the order you choose. To navigate to the Organization Groups Summary page, select Campus Community, Organization, Review Organizations, Organization Groups Summary.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Organization Data," Reviewing Organization Data

Viewing an Account Summary

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

See *PeopleSoft Financial Aid 9.0 PeopleBook*, "Assessing Eligibility for Financial Aid," Pages Used to View Application History.

Chapter 14

Tracking External Education

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

- Enter and update external education data.
- View summary education data for prospects and applicants.

See Also

"Research Tracking Additions to Admissions Functionality" document in the Recruiting and Admissions documentation package for Bundle 24 (CS_Bundle_24_Recruiting_and_Admissions_9_0.pdf). This package is available on My Oracle Support (CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 - Doc ID 1400708.1)

Understanding External Education

Enter and update academic information from external sources in the Education (ACAD_HISTORY_PERS) component. You can record external education data, such as schools attended, academic summaries, subjects, degrees, courses, and dates of attendance.

Note. This information is linked to a *person* rather than an *application*. You can, therefore, consider the information when you evaluate specific applications for the person.

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

View summaries of external education information for prospects and applicants in the Education Summary (SAD_EDUC_SUMMARY) component.

Entering and Updating External Education Data

This section lists common elements and discusses how to:

- Enter external education data.
- Enter transcript comments.
- Enter external courses and degrees.

- Enter transfer credit detail.
- Enter external course comments.
- (CAN) Enter regional data.
- Copy self-reported courses.

Common Elements Used in This Section

Transfer To

Course Credits appears by default. Enter a value and click Go to transfer to another component.

Customize

Click to ensure more efficient and flexible data entry by ordering or hiding tabs and fields.

See *PeopleTools PeopleBook: PeopleSoft Applications User's Guide*

Pages Used to Enter and Update External Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Education	SAD_EXT_EDUCATION	• Student Admissions, Application/Transcript Loads, Education, External Education • Student Recruiting, Maintain Prospects, Academic Information, Education, External Education • Student Admissions, Application Entry, Academic Information, Education, External Education • Records and Enrollment, Transfer Credit Evaluation, External Education, External Education	Enter information about external careers, transcripts, and subjects. View school details.
External Education Comment	SAD_EXT_ED_COMM	Click the Comments link on the External Education page.	Enter transcript comments.

Page Name	Definition Name	Navigation	Usage
Courses and Degrees	SAD_EXT_EDUCATION2	• Student Admissions, Application/Transcript Loads, Education, Courses and Degrees • Student Recruiting, Maintain Prospects, Academic Information, Education, Courses and Degrees • Student Admissions, Application Entry, Academic Information, Education, Courses and Degrees • Records and Enrollment, Transfer Credit Evaluation, External Education, Courses and Degrees	Enter external course defaults and information about external courses and degrees.
Grade Input History	SAD_EXT_CRD_GRD	Click the History link on the Courses and Degrees page.	View a history of grade changes.
Transfer Credit Detail	SAD_EXT_CRD_TRCD	Click the Referenced link on the Courses and Degrees page.	View transfer credit details about external courses.
External Course Comments	SAD_EXT_CRD_COMM	Click the Course Comment link on the Courses and Degrees page.	Enter comments about external courses.
Regional	SAD_EXT_EDUC_REG	• Student Admissions, Application/Transcript Loads, Education, Regional • Student Recruiting, Maintain Prospects, Academic Information, Education, Regional • Student Admissions, Application Entry, Academic Information, Education, Regional • Records and Enrollment, Transfer Credit Evaluation, External Education, Regional	(CAN) Define previous education information for ESIS (Extended Student Information System) reporting.

Page Name	Definition Name	Navigation	Usage
Self Reported Courses	SAD_EXT_EDUC_TRCR	- Student Admissions, Application/Transcript Loads, Education, Self Reported Courses - Student Recruiting, Maintain Prospects, Academic Information, Education, Self Reported Courses - Student Admissions, Application Entry, Academic Information, Education, Self Reported Courses - Records and Enrollment, Transfer Credit Evaluation, External Education, Self Reported Courses	Copy self-reported courses entered by the student on the Evaluate My Transfer Credit page to the Courses and Degrees page.

Entering External Education Data

Access the External Education page (Student Admissions, Application/Transcript Loads, Education, External Education).

The screenshot displays the 'External Education' page for a user named Shari Kirkland (AD5502). The page has tabs for 'External Education', 'Courses and Degrees', 'Regional', and 'Self Reported Courses'. The 'External Education' tab is active, showing a search for 'Cottonwood High School' with 'External Org ID: 000000001'. A 'Checklist Item Update' checkbox is checked. The 'School Details' section is expanded, showing 'Location: School Office', 'Address Line 1: 2233 Testing Drive, Suite 7', 'Address Line 2:', 'Address Line 3:', 'City: Salt Lake City', 'State: UT', 'Postal Code: 84121', and 'Country: USA'. The 'School Characteristics' section shows 'School Type: Secondary', 'School District: SALT LAKE CITY SCHOOL DISTRICT', and checkboxes for 'Accredited' (checked) and 'Transcript Translation Req' (unchecked). The 'School Codes' section shows 'ATP Code: 111111', 'FICE Code: 222222', 'ACT Code: 333333', 'IPEDS Code: 444444', and 'NCES: 555555555555'.

External Education page (1 of 2)

Career Data
Find | View All
First 1 of 1 Last

Data Number: 1
 ***Career:** High Schl
 Term Type: Semester
 External Term: FALL
 Term Year: 2005
 Academic Level: Senior
 From Date: 08/15/2005
 To Date: 12/15/2005
 [Comments](#)

Transcript Status

***Action** Received
 Transcript Date 04/11/2006
 Date Received 04/11/2006
 Transcript Type Official
 Transcript Status Mid-Year
 Data Source School
 Data Medium Hard Copy

Transcript Summary
Customize | Find | View All
First 1-2 of 2 Last

Term	GPA/Units	Rank
1	Grade 12	
2	HS Overall	

*Summary Type	External Term	Ext Year	Acad Level	Institution
1 Grade 12	Fall	2005	Senior	PSU
2 HS Overall	Fall	2005	Senior	PSU

External Subjects
Customize | Find | View All
First 1-2 of 2 Last

GPA	Subject Totals
1	MATH
2	ENGL

*External Subject Area	*Course Level	Institution	GPA Type	External GPA	Converted GPA
1 MATH	Regular	PSU	100A	94.000	4.000
2 ENGL	Regular	PSU	100A	80.000	3.700

Transfer To: Course Credits
 Go

External Education page (2 of 2)

External Org ID (external organization ID)

The source of the external data. The system automatically populates this field from the initial add of Last School Attended on the Prospect School/Recruiting page or the Application School/Recruiting page if a value is entered. You can edit this field.

Checklist Item Update

Select this check box to indicate that the checklist that relates to this row of external data (or transcript) is updated when you run the Checklist Item Update Automated process. If you enter a value of *Received* in the Action field in the Transcript Status group box, this check box is automatically selected when you save the page.

School Details

Click the arrow to the left of School Details to view information about the external organization.

This data is populated from the Organization Table page and the Organization School Data page.

Career Data

Data Number	The system populates this field automatically. The first data item (or row) you enter is <i>1</i> . The system numbers subsequent rows sequentially.
Career	Select the external career for this external data. Values for this field are delivered with your system as translate values.
Term Type	Select the term type that is used by the external organization. Values for this field are delivered with your system as translate values. Examples of the available values include <i>semester</i> and <i>quinmester</i> .
External Term	Enter the external term to which this data relates. For example, if this is a Fall transcript, enter <i>FALL</i> in the External Term field. The available values depend on what you enter in the Term Type field. Define external terms on the External Term Table page. This field is optional; leave it blank until you are ready to enter transfer credit information.
Term Year	Enter the term year that is relevant to this external data entry. This field is optional; leave it blank until you are ready to enter transfer credit information.
Academic Level	Select the academic level of the person at the time the external data was collected or issued. This value might be different from the current academic level. Values for this field are delivered with your system as translate values.
From Date and To Date	Enter the dates of attendance for the career data that you entered.

Transcript Status

Action	<i>Desired</i> appears by default. Select the appropriate action for the transcript. Available values are <i>Desired</i> and <i>Received</i>. Leave the value as <i>Desired</i> if you are entering data for a transcript that you requested. Select a value of <i>Received</i> if the data is for a transcript that you have received. When the Action field is set to <i>Received</i>, you can link the data to an application on the Application Materials page.
Transcript Date	Enter the date that the transcript was issued. The transcript date must not be later than the received date.
Date Received	Enter the date that your office received the transcript. The received date cannot occur before the transcript date.
Transcript Type	Select a transcript type. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.

Transcript Status	Select a transcript status. Values for this field are delivered with your system as translate values.
Data Source	Select the data source for this transcript. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.
Data Medium	Select the format in which you received the transcript. Values for this field are delivered with your system as translate values. These values default from the User Defaults 3 page if defaults are defined there.
Comments	Click to access the External Education Comment page and enter transcript comments.

Transcript Summary

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

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

Note. Many values on this page appear by default from the User Defaults 3 page, from pages in the Create/Maintain Organizations component, and from the data that you entered in the Career Data group box.

Term

Select the Term tab.

Summary Type	Select the summary type for the external data. For example, you might select a summary of an entire high school transcript or a summary of grade 12 only. Define summary types on the External Summary Type Table page.
External Term and Ext Year (external year)	Select the external term and year relevant to the summary. Define external terms on the External Term Table page
Acad Level (academic level)	Select the student's academic level at the time that this information was current, which may not be the student's current academic level. For example, this value could be a summary of a school year that the student has completed. As with the academic level for career data, you can choose which data to enter here and how to relate this academic level data to the career data.

GPA/Units

Select the GPA/Units tab.

Transcript Summary									
Term		GPA/Units		Rank		Customize Find View All First 1-2 of 2 Last			
	*Summary Type	GPA Type		Ext GPA	Conv GPA	Unit Type	Attempted	Completed	
1	Grade 12	100A	100 Pt A	85.000	3.800	Carnegie	4.00	4.00	+ -
2	HS Overall	100A	100 Pt A	90.000	4.000	Carnegie	20.00	20.00	+ -

External Education page: GPA/Units tab

GPA Type (grade point average type)

Enter the GPA type that is used by the external organization. Define GPA types on the GPA Type Table page.

Ext GPA (external grade point average)

Enter the external GPA from the reported information. If you have defined external GPA values for this GPA type on the GPA Type Table page, you can prompt for those values here. Otherwise, you can enter the appropriate numeric GPA value.

Conv GPA (converted grade point average)

If you have defined GPA conversion rules, the system automatically converts the GPA based on the External GPA that you enter. If you have not defined GPA conversion rules, the value that you enter in the External GPA field is copied to the Conv GPA field.

Completed

The value in the Completed field is automatically populated from the value in the Attempted field. You can override this value. Enter the number of units that the student completed if it is different from the number of units that the student attempted.

Rank

Select the Rank tab.

Transcript Summary									
Term		GPA/Units		Rank		Customize Find View All First 1-2 of 2 Last			
	*Summary Type		Rank Type	Class Rank	Class Size	Percentile			
1	Grade 12		Unweighted	23	325	93	+ -		
2	HS Overall		Unweighted	20	325	94	+ -		

External Education page: Rank tab

Class Rank and Class Size

Enter the student's rank in their class and the size of the class.

Percentile

The system automatically calculates the percentile based on the values entered in the Class Rank and Class Size fields.

External Subjects

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

GPA

Select the GPA tab.

Course Level

Select the course level taken in this area. Values for this field are delivered with your system as translate values.

GPA Type (grade point average type)

Enter the GPA type for the school that the student attended. Define GPA types on the GPA Type Table page.

External GPA (external grade point average)

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

Converted GPA (converted grade point average)

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

Subject Totals

Select the Subject Totals tab.

External Subjects									
GPA		Subject Totals		Customize Find View All First 1-2 of 2 Last					
	*External Subject Area		Courses Attempted	Courses Completed	Units Attempted	Units Completed	Unit Type		
1	MATH	Math	4	4	4.00	4.00	Carnegie	+	-
2	ENGL	English	3	3	3.50	3.50	Carnegie	+	-

External Education page: Subject Totals tab

Courses Completed

Enter the number of courses that the student completed if it is different from the number of courses the student attempted.

Units Completed

Enter the number of units that the student completed if it is different from the number of units that the student attempted.

Entering Transcript Comments

Access the External Education Comment page (Click the Comments link on the External Education page).

External Education Comment

ID:	AD5502	Shari Kirkland
External Org ID:	000000001	Cottonwood High School
External Career:	High Schl	
Data Number:	1	

Transcript Comments
Find | View All
 First 1 of 1 Last

Created By:	PS	
Name:	Locherty,Betty	
Date Entered:	10/15/2006	
Default Comment:	TRN Search Transcript Comment	
Comment:	Incomplete Transcript: Final Evaluation Pending.	

External Education Comment page

ID, External Org ID (external organization ID), **External Career**, and **Data Number**

You can enter multiple comments for each of these fields. Your user ID, name, and the date that you entered the comment will appear with each row.

Default Comment and **Comment**

If you enter a default comment, the Comment field is populated with the default text and you can enter more information. You can also add a comment without entering a default. Default comments are defined on the External Education Comments table.

Entering External Courses and Degrees

Access the Courses and Degrees page (Student Admissions, Application/Transcript Loads, Education, Courses and Degrees).

External Education

Courses and Degrees

Regional

Self Reported Courses

Shari Kirkland

AD5502

External Organization

Find | View All

First 1 of 1 Last

External Org ID:

000000001

Cottonwood High School

+

-

External Course Defaults

Data Number:

1

External Career:

High Schl

Apply Defaults

Data Source:

School

Term Type:

Semester

Acad Level:

Senior

External Term:

FALL

Fall

Institution:

PSUNV

PSU

Term Year:

2005

Course Type:

Course

Course Level:

Regular

Unit Type:

Carnegie

Units Taken:

1.00

Grading Scheme:

Ext 100pct

Grading Basis:

GRD

Graded

External Courses

Customize | Find | View All

First 1-2 of 2 Last

Course

Grades

Timeframe

Details

Transfer Credit/ Comments

Course Seq	School Subject	Description	Course Hbr	Course Name		
1	ENGL	English	ENGL100	SPEECH	+	-
2	MATH	Mathematics	MATH101	GEN MATH 2	+	-

External Degrees

Customize | Find | View All

First 1 of 1 Last

Degree

Field of Study

Transcript

	Degree	Description	Degree Date	Data Source	Degree Status	Honors Category		
1	HSD	High School Diploma	12/01/2006	School	Progress	None	+	-

Transfer To:

Course Credits

Go

Courses and Degrees page

Note. Many values on this page appear by default from the User Defaults 3 page, from pages in the Create/Maintain Organizations component, and from the data that you entered on the External Education page.

Important! If you have to enter more than one course, use the External Course Defaults group box to enter information that is common to each course. This group box will save you data entry time.

External Course Defaults

Data Number

If the courses that you enter are linked to a row of transcript data on the External Education page, enter the data number from that page. When you navigate out of this field, the system automatically populates a number of the remaining fields with the data that is linked to this data number. If the courses that you enter are *not* linked to a data number, do not enter a value in this field but complete the remaining fields.

Term Type	If you select a value of <i>Other</i> , the Begin Date and End Date fields become available. If you select any other value, the External Term and Term Year fields become available.
Grading Scheme	Select the grading scheme to convert the grading scheme of the external school to your standards. Define grading schemes on the Grading Scheme Table page.
Apply Defaults	Click to populate the default values to the first row of the External Courses group box. These defaults will then be applied to subsequent rows. You only need to apply the defaults once. If you enter another data number or change the default data, do not select the Apply Defaults button again. The new defaults will automatically apply to subsequent rows of course data that you enter.

External Courses

When you click the Apply Defaults button, the system populates many values in the External Courses group box.

Important! Always apply defaults before you add multiple rows or enter any external course data.

Course

Select the Course tab.

School Subject	Enter the school subject area for the course that you are entering. If you have set up a course catalog for this school, you can prompt for the valid values in this field. If a course catalog does not exist for this school, enter the subject.
Course Nbr (course number)	Enter the school course number for this course. If you have set up a course catalog for this school, you can prompt for the valid values in this field. If a course catalog does not exist for this school, enter the course number.
Course Name	This field is populated when you enter a course number. You can override this value. For example, if Physical Education appears, you might add <i>Basketball</i> as extra text. You can also enter a course name if one is not automatically populated.

Grades

Select the Grades tab.

External Courses									
Course		Grades	Timeframe	Details	Transfer Credit/Comments				
Course Seq	Subject Area	Description	*Units Taken	*Grading Scheme	*Grading Basis	*Grade In	History	Official Grade	
1	ENGL	English	1.00	Ext 100pct	GRD	83		2.3	
2	MATH	Mathematics	1.00	Ext 100pct	GRD	94	History	3.4	

Courses and Degrees page: Grades tab

Units Taken

Appears by default from the value in the Units Taken field in the External Course Defaults group box. The default value is overridden if a value for External Units is defined on the School Course Classification page.

Grade In

Enter grades and grade changes. When you save grade changes, the History link appears.

History

Click to access the Grade Input History page and view a history of the grade changes. This link will only appear if a change was made to the value in the Grade In field.

Transfer Credit/Comments

Select the Transfer Credit/Comments tab.

External Courses									
Course		Grades	Timeframe	Details	Transfer Credit/Comments				
Course Seq	Transfer Credit	Transfer Credit Status	Transfer Credit Type	Course Comment					
1	☒	Referenced	Other	Course Comment		+	-		
2	☒	Referenced	Other	Course Comment		+	-		

Courses and Degrees page: Transfer Credit/Comments tab

Transfer Credit

This check box is selected by default.

Transfer Credit Status

The Referenced link is available if the course was used in a Transfer Credit model articulation rule. Click to access the Transfer Credit Detail page and view transfer credit information about the course.

(CAN) Transfer Credit Type

This field is available if the Government Reporting check box for Canada is selected on the SA Features (student administration features) page.

Course Comment

Click to access the External Course Comments page and enter comments about courses.

External Degrees

Enter information about external degrees that are in progress or completed.

Degree

Select the Degree tab.

- Degree and Description

If you enter a value in the Degree field, the Description field is populated. If a degree value is not available, enter a description.
- Degree Date

Enter the date that the degree was or will be granted.
- Degree Status

Complete appears by default.

Field of Study

Select the Field of Study tab.

External Degrees

Customize | Find | View All | 1 of 1 | First | Last

Degree

Field of Study

Transcript

	Degree	External Subject 1	Field of Study 1	External Subject 2	Field of Study 2		
1	HSD	ENGL	English	MATH	Mathematics	+	-

Courses and Degrees page: Field of Study tab

- External Subject 1, Field of Study 1, External Subject 2, and Field of Study 2

When you enter external subject information, field of study information appears. If a subject area value is not available, enter the field of study information.

Transcript

Select the Transcript tab.

External Degrees

Customize | Find | View All | 1 of 1 | First | Last

Degree

Field of Study

Transcript

	Degree	External Career	Data Number		
1	HSD	High Schl	1	+	-

Courses and Degrees page: Transcript tab

- Data Number

If this degree data is related to a specific transcript or source of information, select the data number of the transcript or other source. The system populates this field from the External Education page.

Entering Transfer Credit Detail

Access the Transfer Credit Detail page (Click the Referenced link on the Courses and Degrees page).

Transfer Credit Detail

EmplID: ADED03 Alexander Oregano
External Org ID: 000010146
Course Seq: 3
School Subject: MATH **Course Number:** 15
Course Name: Calculus I
Current Grade Input: A

Transfer Credit Detail				
Model Nbr	Articulation Term	Transfer Status	Units Taken	Grade Input
1	0570	Posted	4.00	A

Transfer Credit Detail page

View transfer credit information about courses. These values default from the Transfer Course Details page if the course tied to an articulation rule.

Note. Multiple transfer credit statuses may exist for each course because a course can be modeled more than once.

Articulation Term The term for which the transfer credit was processed.

Transfer Status The status of the transfer credit model. The available values are *Submitted*, *Completed*, and *Posted*.

Entering External Course Comments

Access the External Course Comments page (Click the Course Comment link on the Courses and Degrees page).

External Course Comments

ID:	ADED02	Franklin Gammage
External Org ID:	000000001	Cottonwood High School
School Subject:	MATH	Mathematics
Course Number:	MATH104	ADV ALGEBRA

Course Comments
Find | View All
First 1 of 1 Last

Created By:	PS	
Name:	Locherty,Betty	
Date Entered:	09/12/2006	
Default Comment:	CRS	Course Comment
Comment:	Course taken for honors credit.	

External Course Comments page

ID,External Org ID(external organization ID), **School Subject**,and **Course Number**

You can enter multiple comments for each of these fields. Your user ID, name, and the date that you enter the comment appears for each row.

Default Comment and **Comment**

If you enter a default comment, the Comment field is populated with the default text and you can enter more information. You can also add a comment without entering a default. Define default comments on the External Education Comments table.

(CAN) Entering Regional Data

Access the Regional page (Student Admissions, Application/Transcript Loads, Education, Regional).

External Education	Courses and Degrees	Regional	Self Reported Courses
Shari Kirkland		AD5502	
▼ Canada			
External Organization Find View All First 1 of 1 Last			
External Org ID: 000000001 Cottonwood High School			
Additional Information Find View All First 1 of 1 Last			
Career:	High School	Data Number:	1
Trans Date:	04/11/2006	Transcript Type:	Official
		Transcript Status:	Mid-Year
Previous Educational Activity:	Apprentice ▼		
Previous PostSecond Credential:	Certificat ▼		
Transfer To: Course Credits ▼ Go			

Regional page

This page is available if the Government Reporting check box for Canada is selected on the SA Features page.

Previous Educational Activity Select the student's most recent educational activity.

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

Copying Self-Reported Courses

Access the Self Reported Courses page (Student Admissions, Application/Transcript Loads, Education, Self Reported Courses).

External Education

Courses and Degrees

Regional

Self Reported Courses

Shari Kirkland

AD5502

Self Reported Courses

Find | View All

First 1 of 1 Last

External Org ID: 000010143

Fresno City College

+ -

[Check All](#)

[Clear All](#)

External Courses

Customize | Find | View All

First 1-2 of 2 Last

Course Data

Additional Information

	Copy to Education	School Subject	School Course Nbr	Course Name	Units Taken	Grade Input	External Term	Term Year	Course Level
1	☐	MATH	10	College Algebra	3.00	B	Fall	2005	Regular
2	☐	FNLN	18	Spanish 1	3.00	A	Spring	2005	Regular

Course Defaults

'Data Source'

'Course Type'

Transfer To:

Go

Copy Selected Courses

Self Reported Courses page

This page is available if a student has modeled transfer credit through self service. Instead of entering external course information from an official transcript, you can copy some or all courses from self service to the Courses and Degrees page.

Course Data

Select the Course Data tab.

Copy to Education

Select the check box for each course that you want to copy. Use the Check All link to copy all the courses.

Copy Selected Courses

Copy Selected Courses

Click to copy the course data to the Courses and Degrees page.

A row is also added on the External Education page. *Unofficial* appears by default in the Transcript Type field, and *Incomplete* appears by default in the Transcript Status field. To include copied courses in the automated application evaluation process, change the type to *Official* and the status to *Final* or *Mid Year*, or associate the course with an official transcript row by changing the data number associated with the course.

Additional Information

Select the Additional Information tab.

External Courses						
Course Data		Additional Information		Customize Find View All First 1-2 of 2 Last		
	Copy to Education	Grading Scheme	Grading Basis	External Term Type	Academic Institution	Course Copied
1	☐	Undergrad	Graded	Semester	PSU	☐
2	☐	Undergrad	Graded	Semester	PSU	☒

Self Reported Courses page: Additional Information tab

Copy to Education If a course is copied, the check box is unavailable and the course cannot be copied again.

Course Copied If a course is copied, the check box is selected.

Note. After a course has been copied, any changes that a student makes in self service are not reflected on the External Courses page.

Viewing Summary Education Data for Prospects and Applicants

This section lists common elements and discusses how to:

- View external academic summary information.
- View external subject summary information.
- View external degree summary information.
- View external course summary information.

Common Elements Used in This Section

Transcript Data Click to access the Transcript Data page and view details about external transcripts.

Pages Used to View Summary Education Data for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Academic Summary	EXT_ACAD_SUMMARY	- Student Admissions, Applicant Summaries, Education Summary, External Academic Summary - Student Recruiting, Prospect Summaries, Education Summary, External Academic Summary	View external academic summary information.
Transcript Data	TRANSCRIPT_SEC1	Click the Transcript Data link on the External Academic Summary page.	View information about external transcripts.
Academic Data Detail	EXT_ACAD_SEC	Click the Academic Data Detail link on the External Academic Summary page.	View external academic data.
External Subject Summary	EXT_SUBJ_SUMMARY	- Student Admissions, Applicant Summaries, Education Summary, External Subject Summary - Student Recruiting, Prospect Summaries, Education Summary, External Subject Summary	View summaries of external subjects.
Transcript Data	TRANSCRIPT_SEC2	Click the Transcript Data link on the External Subject Summary page.	View information about external transcripts.
Academic Subject Detail	EXT_SUBJ_SUM_SEC	Click the Academic Subject Detail link on the External Subject Summary page.	View further details about an external subject summary.

Page Name	Definition Name	Navigation	Usage
External Degree Summary	EXT_DEGREE_SUMMARY	- Student Admissions, Applicant Summaries, Education Summary, External Degree Summary - Student Recruiting, Prospect Summaries, Education Summary, External Degree Summary	View external degree summary information.
Transcript Data	TRANSCRIPT_SEC3	Click the Transcript Data link on the External Degree Summary page.	View information about external transcripts.
External Course Summary	EXT_COURSE_SUMMARY	- Student Admissions, Applicant Summaries, Education Summary, External Course Summary - Student Recruiting, Prospect Summaries, Education Summary, External Course Summary	View external course summary information.
Transcript Data	TRANSCRIPT_SEC4	Click the Transcript Data link on the External Course Summary page.	View information about external transcripts.
External Course Detail	EXT_COURSE_DTL	Click the Course Detail link on the External Course Summary page.	View further details about external course summary information.

Viewing External Academic Summary Information

Access the External Academic Summary page (Student Admissions, Applicant Summaries, Education Summary, External Academic Summary).

External Academic Summary		External Subject Summary		External Degree Summary		External Course Summary																	
Moses Morning		SFEK00064																					
Select Academic Data By Acad Level: Org ID: Search Data Source: Summary Type: Institution: Term Year:				Sort Academic Data By Data Source:																			
Find View All First 1 of 1 Last <table border="1"> <thead> <tr> <th>Data Nbr</th> <th>Organization</th> <th>Institution</th> <th>Sum Type</th> <th>Data Source</th> <th>Conv GPA</th> <th>Percent</th> <th>Units</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Cottonwood High School</td> <td>PSU</td> <td>HS Overall</td> <td>School</td> <td>4.000</td> <td>52</td> <td> Transcript Data Academic Data Detail </td> </tr> </tbody> </table>								Data Nbr	Organization	Institution	Sum Type	Data Source	Conv GPA	Percent	Units	1	Cottonwood High School	PSU	HS Overall	School	4.000	52	Transcript Data Academic Data Detail
Data Nbr	Organization	Institution	Sum Type	Data Source	Conv GPA	Percent	Units																
1	Cottonwood High School	PSU	HS Overall	School	4.000	52	Transcript Data Academic Data Detail																

External Academic Summary page

Search for all academic summary information, or search by particular criteria, such as academic level or summary type. You can also sort the data in a particular order.

Academic Data Detail

Click to access the Academic Data Detail page and view information about external academic data.

Viewing External Subject Summary Information

Access the External Subject Summary page (Student Admissions, Applicant Summaries, Education Summary, External Subject Summary).

External Academic Summary		External Subject Summary		External Degree Summary		External Course Summary																	
Moses Morning		SFEK00064																					
Select Subjects By Acad Level: Org ID: Search Data Source: Subject: Course Level: Term Year:				Sort Subjects By Data Source:																			
Find View All First 1 of 1 Last <table border="1"> <thead> <tr> <th>Organization</th> <th>Subject</th> <th>Data Source</th> <th>Crse Level</th> <th>Nbr Crses</th> <th>Units</th> <th>Conv GPA</th> <th></th> </tr> </thead> <tbody> <tr> <td>Cottonwood High School</td> <td>MISC. Cour</td> <td>School</td> <td>Regular</td> <td></td> <td></td> <td></td> <td> Transcript Data Academic Subject Detail </td> </tr> </tbody> </table>								Organization	Subject	Data Source	Crse Level	Nbr Crses	Units	Conv GPA		Cottonwood High School	MISC. Cour	School	Regular				Transcript Data Academic Subject Detail
Organization	Subject	Data Source	Crse Level	Nbr Crses	Units	Conv GPA																	
Cottonwood High School	MISC. Cour	School	Regular				Transcript Data Academic Subject Detail																

External Subject Summary page

Search for all subject summary information, or search by particular criteria, such as academic level or subject. You can also sort the subjects in a particular order

Academic Subject Detail

Click to access the Academic Subject Detail page and view further information about external subjects.

Viewing External Degree Summary Information

Access the External Degree Summary page (Student Admissions, Applicant Summaries, Education Summary, External Degree Summary).

External Academic Summary	External Subject Summary	External Degree Summary	External Course Summary
Moses Morning		SFEK00064	
Sort Degree By			
Degree			
Find View All First 1 of 1 Last			
Organization	Degree Date	Degree	Degree Status
Cottonwood High School	05/26/2004	CERT	Certificate

External Degree Summary page

Sort Degree By

Indicate the order in which you want to view degree information.

Viewing External Course Summary Information

Access the External Course Summary page (Student Admissions, Applicant Summaries, Education Summary, External Course Summary).

External Academic Summary	External Subject Summary	External Degree Summary	External Course Summary
Moses Morning		SFEK00064	
Select Courses By		Sort Courses By	
Acad Level:		Org ID:	
Data Source:		Subject:	
Course Level:		Term Year:	
Search		Data Source	
Find View All First 1 of 1 Last			
Organization	Sch Subj	Course	Description
Cottonwood High School	FNLN	FNLN2	SPANISH 2
Acad Level	Data Source	Units	Grade
Unknown	Self-Rptd	3.00	4.3
Transcript Data Course Detail			

External Course Summary page

Search for all course summary information, or search by particular criteria, such as academic or course level. You can also sort the courses in a particular order.

Course Detail

Click to access the External Course Detail page and view further information about external courses.

Chapter 15

Tracking General and Application Materials for Prospects and Applicants

This chapter discusses how to:

- Enter general materials for prospects and applicants.
- Link materials to an application.
- View summary application materials information.

Entering General Materials for Prospects and Applicants

This section discusses how to:

- Enter general materials.
- Add details about the recommender.
- View general materials summary information for prospects and applicants.
- Manually associate supporting materials to an application.
- Link general materials to applications.

Pages Used to Enter General Materials for Prospects and Applicants

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Materials	GENL_MATERIALS	- Student Admissions, Application Evaluation, Evaluate Application Materials, General Materials - Student Recruiting, Evaluate Prospects, General Materials	Enter supporting information for prospects and applications. The type of information you record here is the information that you defined as a general material type. For example, PeopleSoft considers essays, portfolios, recommendations and interviews as general materials. General material data is linked to a <i>person</i>, so anything that you enter on this page can be used to evaluate any applications for this person. After you have identified the general materials, you can link them to applications and evaluations.
Recommender Information	ORG_DATA_PANEL	Click the Recommender Information link on the General Materials page.	Add details about the recommender.
Address Information	ADDR_INFO_PANEL	Click the Address Information link on the General Materials page.	View, add, or edit a recommender's mailing address. If you select an address location on the Recommender Information page, the system automatically populates the address on this page. Conversely, you can manually enter the mailing address information you have for this recommender. Note that if this is an address of an organization, any changes you enter do not affect the addresses that are stored elsewhere in the system for the school or organization with which this recommender is affiliated.

Page Name	Definition Name	Navigation	Usage
General Materials Summary	GENL_MATL_SUMMARY	- Student Admissions, Applicant Summaries, General Materials Summary - Student Recruiting, Evaluate Prospects, General Materials Summary	View any general materials stored for a person. You can display the information by material group or material type.
Recommender	RECOMMENDER_SEC1	Click the Recommender link on the General Materials Summary page.	View further details about general materials summary information. This Recommender Detail page is available with a <i>Recommendation</i> material type entry.

Entering General Materials

Access the General Materials page (Student Admissions, Application Evaluation, Evaluate Application Materials, General Materials or Student Recruiting, Evaluate Prospects, General Materials).

General Materials

Moses Morning SFEK00064

Find | View All First 1 of 1 Last

*Material Group:

GRRECOMM

Graduate Recommendations

*Material Type:

REC

Recommendation

Material Nbr:

1

☒ Checklist Item Update

Date Received:

09/10/2004

Date Recorded:

09/10/2004

[Recommender Information](#)
[Address Information](#)

Rcmd Type:

Comments:

General Materials page

Note. The fields on this page vary depending on the material group type you select. The material data that is attached to this type dictates what fields are available. For example, the Recommender Information and Address Information links enable you to enter information and addresses about recommenders. However, these links appear on the page only when the material type is *REC* (recommendation).

Material Group	Enter the material group to which you are associating this applicant. Only material groups that include a material type that is marked General Material are available to select. Define material groups on the Material Group Table page.
Material Type	Enter a material type. Only general material types from this material group are available. Material types are associated with groups on the Material Group Table page.
Material Nbr (material number)	This display-only field shows which general material entry you are viewing for this person. For example, the first general material entry is number 1, and the second is number 2.
Checklist Item Update	When you add a new material group row, the system automatically selects this check box. The check box indicates that the checklist related to this row of general material data is updated when you run the Checklist Item Update Automated process.
Date Received	The system uses the system date as the default date on which materials were received. You can edit this field.
Date Recorded	The system uses the system date as the default date on which materials were recorded. You can edit this field.
Rcmd Type (recommender type)	Which remaining fields are available to you depends on the variable data that is associated with the material type that you select. In the example, you enter the recommender type. Values for this field are delivered with your system as translate values. You can modify these translate values.
Comments	Enter any notes or text for this general materials entry.
Recommender Information	This link appears when you select the <i>REC</i> (recommendation) material type. Click this link to add details about the recommender. The Recommender Information page appears.
Address Information	This link appears when you select the <i>REC</i> (recommendation) material type. Click this link to view, add, or edit the mailing address for this recommender. The Address Information page appears.

See Also

"Research Tracking Additions to Admissions Functionality" document in the Recruiting and Admissions documentation package for Bundle 24 (CS_Bundle_24_Recruiting_and_Admissions_9_0.pdf). This package is available on My Oracle Support (CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 - Doc ID 1400708.1).

Adding Details About the Recommender

Access the Recommender Information page (Click the Recommender Information link on the General Materials page).

ID	If this recommender is in your database, enter the person's ID.
Name	If you enter an ID, the recommender's name automatically appears. If you do not enter an ID because this recommender is not in your database, type in the recommender's name.
Title	Enter the recommender's title.
Org ID (organization identification)	If the recommender is affiliated with a school or organization in your database, enter the organization ID. The name of the organization automatically appears. Leave this field blank if the recommender is not associated with a school or organization in your database and type in the name of the organization.
Location	If you enter an organization ID, you can choose any defined address for the organization or school that you want to use as a mailing address for the recommender.
Org Name (organization name)	The system automatically populates the organization name if you enter an organization ID. Type in the organization name if the organization does not already exist in your database.

Viewing General Materials Summary Information for Prospects and Applicants

Access the General Materials Summary page (Student Admissions, Applicant Summaries, General Materials Summary or Student Recruiting, Evaluate Prospects, General Materials Summary).

General Materials Summary

Moses Morning
SFEK00064

Select Materials By

Material Group:
Material Type:

Sort Materials By

☒ Material Group
☐ Material Type

Search

Find | View All
First 1 of 1 Last

Material Group	Material Type	Matl Nbr	Date Recvd	Dt Record	Type
Graduate Recommendations	Recommendation	1	09/10/2004	09/10/2004	Recommender

General Materials Summary page

You must first enter general material information for this person in the General Materials page.

Select Materials By

Material Group	Enter a material group to search for a summary of general materials for this person based on material group.
Material Type	Enter a material type to search for a summary of general materials for this person based on material type.

Sort Materials By

Material Group	Enter a material group to sort the findings by material group.
Material Type	Enter a material type to sort the findings by material type.
Search	Click the Search button to locate information that matches your search criteria.

Other Page Elements

Recommender	Click to view additional details about general materials summary information for a particular row.

Manually Associating Supporting Materials to an Application

Access the Application Materials page (Student Admissions, Application Entry, Application Materials, Application Materials).

Application Materials			
Moses Morning		SFEK00064	
Academic Career:	Undergraduate	Application Nbr:	00024116
Prog Nbr:	0	Academic Program:	Liberal Arts Undergraduate
	Material Group		Available Materials
Test Scores:	UGTESTS 	Undergraduate Test Scores	Test Scores
Academic Summary:	UGSUMMRY 	Undergraduate Academic Summary	Academic Summary
External Courses:	UGCRSES 	Undergraduate External Courses	External Courses
External Subjects:	UGSUBJCT 	Undergraduate Subjects	External Subjects
Transcripts:	UGTSCRIPT 	UG External Transcripts	Transcripts
			General Materials

Application Materials page

An application for this person must already exist.

Test Scores

To link a test score group to this application, enter a material group for the test scores material type. Only groups that include a test scores material type are available. Define material groups on the Material Group Table page.

After you enter a test score material group, click the Test Scores link to view a list of test scores that are associated with this applicant. The Select Test Scores page appears.

Academic Summary

To link an academic summary group to this application, enter a material group for the academic summary material type. Only those groups that include an academic summary material type are available.

After you enter an academic summary material group, click the Academic Summary link to view a list of academic summaries that are associated with this applicant. The Select Academic Summary Data page appears.

External Courses

To link an external course group to this application, enter a material group for the external courses material type. Only those groups that include an external courses material type are available.

After you enter an external course material group, click the External Courses link to view a list of external courses that are associated with this applicant. The Select External Courses page appears.

External Subjects

To link an external subject group to this application, enter a material group for the external subjects material type. Only those groups that include an external subjects material type are available.

After you enter an external subjects material group, click the External Subjects link to view a list of external courses that are associated with this applicant. The Select External Subjects page appears.

Transcripts

To link transcripts to this application, enter a material group for the transcripts material type. Only those groups that include a transcripts material type are available.

After you enter a transcripts material group, click the Transcripts link to view a list of transcripts that are associated with this applicant. The Select Transcripts page appears.

General Materials

Click to link general materials to this application. The Select General Materials page appears, where you can view a list of general materials that are associated with this applicant.

Go

Click this button to go to another component.

See Also

[Chapter 30, "Evaluating Applicants Using Automatic Processing," Assigning Evaluation Codes to Applications in Batch, page 982](#)

Linking General Materials to Applications

Access the Select General Materials page (Click the General Materials link on the Application Materials page).

Recommender Detail

If an interviewer or recommended is linked to a general material entry, click the Recommender Detail link to view information about that person.

Linking Materials to an Application

This section discusses how to link materials to an application.

Pages Used to Link Materials to an Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Materials	ADM_APPL_MATL	Student Admissions, Application Entry, Application Materials, Application Materials	Manually associate application materials to an application. If the information for this person is stored elsewhere in the database, you can link the relevant data to an application on this page.
Select Test Scores	APPL_SCORES_SP	After choosing a test score material group, click the Test Scores link on the Application Materials page.	View test scores that are associated with this applicant. Select the test IDs that you want to link to this application. All tests for this applicant that are not already linked to this application are available on this page. Select only those tests that are relevant to this material group and application. You can enter tests for a applicant on the Test Results page.

Page Name	Definition Name	Navigation	Usage
Select Academic Summary Data	APPL_ACAD_SUMM_SP	After choosing an academic summary material group, click the Academic Summary link on the Application Materials page.	Link an academic summary group to this application. the system stores all academic summaries for this applicant that are not already linked to this application are available on this page. Select only those academic summaries that are relevant to this material group and application. You can enter academic summaries for an applicant on the External Education page.
Select External Courses	APPL_COURSE_SP	After you choose an external course material group, click the External Courses link on the Application Materials page.	Link external courses to this application. Select the external courses that you want to link to this application. All external courses for this applicant that are not already linked to this application are available on this page. Select only those external courses that are relevant to this material group and application. You can enter external courses for an applicant on the Courses and Degrees page .
Select External Subject	APPL_SUBJECTS_SP	After you choose an external subjects material group, click the External Subjects link on the Application Materials page.	Link external subjects to this application. Select the external subjects that you want to link to this application. All external subjects for this applicant that are not already linked to this application are available on this page. Select only those external subjects that are relevant to this material group and application. You can enter external subjects for an applicant on the External Education page.

Page Name	Definition Name	Navigation	Usage
Select Transcripts	APPL_TRANSCRIPT_SP	After you choose a transcripts material group, click the Transcripts link on the Application Materials page.	Link transcripts to this application. Select the transcripts that you want to link to this application. All transcripts for this applicant that are not already linked to this application are available on this page. Select only those transcripts that are relevant to this material group and application. You can enter transcript information for an applicant on the External Education page.
Select General Materials	APPL_MATL_SP	Click the General Materials link on the Application Materials page.	Link general materials to this application. Select only those general materials that you want to link to this application. All general materials for this applicant that are not already linked to this application are available on this page. You can enter general materials for an applicant on the General Materials page.
Recommender Detail	INTERVIEWER_SEC2	Click the Recommender Detail link on the Select General Materials page.	View information about an interviewer or a recommender.

Viewing Summary Application Materials Information

This section discusses how to:

- View materials summary information.
- View academic summary information.
- View academic subjects summary information.
- View course summary information.

See Also

Chapter 13, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 149

Pages Used to View Summary Application Materials Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Materials Summary	APPL_MATL_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Materials Summary	View summary information regarding materials assigned to a person, and associated with a particular application and academic program.
Interviewer Detail	INTERVIEWER_SEC	Click the Interviewer Detail link on the Materials Summary page.	View additional interview information.
Recommender Detail	RECOMMENDER_SEC	Click the Recommender Detail button on the Materials Summary page.	View additional recommender information.
Test Score Summary	APPL_TEST_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Test Score Summary	View summary test scores information that is associated with a particular application and academic program.
Transcripts Summary	APPL_TRNS_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Transcripts Summary	View summary transcript information that is associated with a particular application and academic program.
Academic Summary	APPL_SUMM_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Academic Summary	View academic summary information that is associated with a particular application and academic program. You can view the data in a variety of formats, depending on your selection criteria.
Application Summary Detail	APPL_SUMM_SEC	Click the App Summary Detail link on the Academic Summary page to view the Application Summary Detail page.	View application detail information.
Academic Subjects Summary	APPL_SUBJ_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Academic Subjects Summary	View summary information about academic subjects that are associated with a particular application and academic program.

Page Name	Definition Name	Navigation	Usage
Academic Subject Detail	APPL_SUBJ_SUM_SEC	Click the Acad Subject Detail button on the Academic Subjects Summary page to view the Application Subject Detail page.	View application subject information.
Course Summary	APPL_CRSE_SUMMARY	Student Admissions, Applicant Summaries, Application Materials Summary, Course Summary	View summary course information that is associated with a particular application and academic program.
Transcript Data	APPL_CRSE_TRAN_SEC	Click the Transcript Data link to open the Transcript Data page.	View transcript data.
Application Course Detail	APPL_CRSE_SEC	Click the App Course Detail link to open the Application Course Detail page.	View an applicant's course detail information.

Viewing Materials Summary Information

Access the Materials Summary page (Student Admissions, Applicant Summaries, Application Materials Summary, Materials Summary).

Materials Summary		Test Score Summary		Transcripts Summary		Academic Summary		Academic Subjects Summary		
Dario Miselli				ID		AD6999				
Academic Career:		Undergraduate			Application Nbr:		00024151			
Prog Nbr:		0			Academic Program:		Liberal Arts Undergraduate			
Material Group			Material Type		Material Nbr		Date Recorded		Type	
									Detail	

Materials Summary page

You must first attach materials to the application on the Application Materials page.

Interviewer Detail

Click this link to view about interviewer information about this material type. The Interviewer Detail page appears.

Recommender Detail

Click this link to view recommender information about this material type. The Recommender Detail page appears.

Viewing Academic Summary Information

Access the Academic Summary page (Student Admissions, Applicant Summaries, Application Materials Summary, Academic Summary).

Materials Summary

Test Score Summary

Transcripts Summary

Academic Summary

Academic Subjects Summary

Dario Miselli

ID

AD6999

Academic Career:

Undergraduate

Application Nbr:

00024151

Prog Nbr:

0

Academic Program:

Liberal Arts Undergraduate

Select Academic Summary By

Acad Level:

Data Source:

Sum Type:

Search

Org ID:

Institution:

PSUNV

Term Year:

Data Nbr	Organization	Institution	Sum Type	Data Source	Conv GPA	Percent	Units		
1	Redondo Union High School	PSU	HS Overall	School	3.880	99	20.00	Transcript Data	App Summary Detail

Academic Summary page

- Acad Level(academic level)

Select the academic level for which you want to search for academic summary information.
- Org ID (organization ID)

Enter the organization ID for which you want to search for academic summary information.
- Data Source

Select the data source for which you want to search for academic summary information.
- Institution

Enter the academic institution for which you want to search for academic summary information.
- Sum Type(summary type)

Enter the summary type for which you want to search for academic summary information.
- Term Year

Enter the term year for which you want to search for academic summary information.
- Search

Click this button to view information matching your search criteria.
- App Summary Detail
(application summary detail)

Click this link to view application summary details. The Application Summary Detail page appears.

Viewing Academic Subjects Summary Information

Access the Academic Subjects Summary page (Student Admissions, Applicant Summaries, Application Materials Summary, Academic Subjects Summary).

Materials Summary		Test Score Summary		Transcripts Summary		Academic Summary		Academic Subjects Summary	
Dario Miselli				ID		AD6999			
Academic Career: Undergraduate				Application Nbr:		00024151			
Prog Nbr: 0				Academic Program:		Liberal Arts Undergraduate			
Select Subject By									
Acad Level:		Data Source:		Subject:				Search	
Org ID:		Course Level:		Term Year:					
<u>Organization</u>	<u>Subject</u>	<u>Data Source</u>	<u>Crse Level</u>	<u>Nbr Crses</u>	<u>Units</u>	<u>Conv GPA</u>			
Redondo Union High School	Math	School	Honors				Transcript Data	Acad Subject Detail	
Redondo Union High School	English	School	AP				Transcript Data	Acad Subject Detail	
Redondo Union High School	Economics	School	AP				Transcript Data	Acad Subject Detail	
Redondo Union High School	Biology	School	Regular				Transcript Data	Acad Subject Detail	

Academic Subjects Summary page

Acad Level (academic level)	Select the academic level for which you want to search for academic subjects summary information.
Org ID (organization ID)	Enter the organization ID for which you want to search for academic summary information.
Data Source	Select the data source for which you want to search for academic subjects summary information.
Course Level	Select the course level for which you want to search for academic subjects summary information.
Subject	Enter the subject for which you want to search for academic subjects summary information.
Term Year	Enter the term year for which you want to search for academic subjects summary information.
Search	Click the Search button to view information matching your search criteria.
Acad Subject Detail (academic subject detail)	Click this link to view academic subject details. The Application Subject Detail page appears.

Viewing Course Summary Information

Access the Course Summary page (Student Admissions, Applicant Summaries, Application Materials Summary, Course Summary).

Test Score Summary		Transcripts Summary		Academic Summary		Academic Subjects Summary		Course Summary	
Dario Miselli				ID		AD6999			
Academic Career: Undergraduate				Application Nbr:		00024151			
Prog Nbr: 0				Academic Program:		Liberal Arts Undergraduate			
Select Course By									
Acad Level:				Data Source:				Subject:	
Org ID:				Course Level:				Search	
<u>Organization</u>	<u>Sch Subj</u>	<u>Course</u>	<u>Description</u>	<u>Acad Level</u>	<u>Data Source</u>	<u>Units</u>	<u>Grade</u>		
Redondo Union High School	BUSN	BUSN1	Business 101	12th Grade	School	3.00	A	Transcript Data App Course Detail	

Course Summary page

You must first attach course summaries to the application on the Application Materials page.

Acad Level (academic level)	Select the academic level for which you want to search for course summary information.
Org ID (organization ID)	Enter the organization ID for which you want to search for course summary information.
Data Source	Select the data source for which you want to search for course summary information.
Course Level	Select the course level for which you want to search for course summary information.
Subject	Enter the subject for which you want to search for course summary information.
Search	Click the Search button to view information matching your search criteria.
Transcript Data	Click this link to view transcript data. The Transcript Data page appears.
App Course Detail (application course detail)	Click this link to view application course details. The Application Course Detail page appears.

Chapter 16

Viewing Groups of Prospects or Applicants

This chapter discusses how to:

- View prospects and applicants by organization.
- View prospects and applicants assigned to a specific recruiter.

Viewing Prospects and Applicants by Organization

This section discusses how to:

- View prospects by organization.
- View contact information.
- View applicants by organization.

Pages Used to View Prospects and Applicants by Organization

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospects by Organization	ORG_PRSP_SUMMARY	Student Recruiting, External Org Summaries, Org Admissions Summary, Prospects by Organization	View lists of prospects that are associated with a particular external organization and display the records in the order you choose. You can narrow the scope to view only certain prospects that are associated with an external organization.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Programs link on the Prospects by Organization page.	View a list of programs for a prospect.

Page Name	Definition Name	Navigation	Usage
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the Org Primary Location link on the Prospects by Organization page.	View the primary address of the organization or school.
Organization School Information	SCHOOL_INFO	Click the School Information link on the Organization Primary Location page.	View additional information regarding a school.
Contact Information	EXT_ORG_CNTCT_SEC	Click the Contact Information link on the Prospects By Organization page.	View any contacts that are associated with this school.
Organization Contact Detail	EXT_ORG_CNTCT_PHN	Click the Details link on the Contact Information page.	View a contact's address, email address, and phone numbers.
Applicants by Organization	ORG_APPL_SUMMARY	Student Recruiting, External Org Summaries, Org Admissions Summary, Applicants by Organization	View lists of applicants that are associated with a particular organization or school and display the records in the order you choose. You can narrow the scope to view only certain applicants that are associated with a school.
Applicant Programs	ORG_APPL_P_SEC	Click the Applicant Programs link.	View a listing of academic programs for an applicant.

Viewing Prospects by Organization

Access the Prospects by Organization page (Student Recruiting, External Org Summaries, Org Admissions Summary, Prospects by Organization).

Prospects by Organization		Applicants by Organization	
External Org ID:	000000001	Cottonwood High School	LAUUGRD0505
Organization Type:	School	Proprietorship:	Public
Org Primary Location		Contact Information	
Select Prospects By			
Institution:	PSUNV	Admit Term:	
Career:	UGRD	Recruiting Status:	
Acad Prog:		Applied:	
Search			
Sort Prospects By			
☒ Career ☐ Admit Term ☐ Recruiting Status			
Find View 100 First 1-5 of 131 Last			
Carry ID	ID	Name	Career
	AA0037	Greene,Ronald	Undergrad
Carry ID	AD5022	Smith,Doug	Undergrad
Carry ID	AD5023	Smith,Jane	Undergrad
Carry ID	AD5024	Smith,John	Undergrad
Carry ID	AD5025	Smith,Amy	Undergrad
			Institution
			PSU
			Admit Term
			2001 Fall
			Rcrtg Stat
			Applicant
			Applied
			☒
			Prospect Programs

Prospects by Organization page

Institution	Enter the academic institution for which you want to search for prospect information.
Career	Enter the academic career for which you want to search for prospect information.
Acad Prog (academic program)	Enter the academic program for which you want to search for prospect information.
Admit Term	Enter the admit term for which you want to search for prospect information.
Recruiting Status	Select the recruiting status for which you want to search for prospect information.
Applied	Select to view records for prospects who applied to your institution.
Sort Prospects By	Select whether you want to view prospects by career, admit term, or recruiting status.
Search	Click this button find the prospects that match your search criteria. the system displays matches in the bottom portion of the page.
Carry ID	Click this button to carry forward this person's ID to the next page.
Prospect Programs	Click this link to view a listing of the academic programs for a prospect. The Prospect Programs page appears.
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.

Contact Information

Click this link to view any contacts that are associated with this school. The Contact Information page appears.

Viewing Applicants by Organization

Access the Applicants by Organization page (Student Recruiting, External Org Summaries, Org Admissions Summary, Applicants by Organization).

Prospects by Organization

Applicants by Organization

External Org ID:000000001

Cottonwood High School

[Org Primary Location](#)

Organization Type:School

Proprietorship:Public

[Contact Information](#)

Select Applicants By

Sort Applicants By

Institution:PSUNV

Admit Term:

Search

Career:UGRD

Academic Program:

Admit Type:

Status:

Find | View 100

First1-5 of 417Last

	ID	Name	Appl Nbr	Career	Institution	Admit Type	Complete	
Carry ID	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year	☐	Applicant Programs
Carry ID	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year	☐	Applicant Programs
Carry ID	AA0037	Greene,Ronald	00022830	Undergrad	PSU	First-Year	☐	Applicant Programs
Carry ID	AD5022		00022766	Undergrad	PSU	First-Year	☐	Applicant Programs
Carry ID	AD5022		00022766	Undergrad	PSU	First-Year	☐	Applicant Programs

Applicants by Organization page

- Career and Institution

These values are based on your user defaults. Edit the values if necessary.
- Admit Type

Enter an admit type.
- Admit Term

Enter the admit term of the applicants you want to view.
- Acad Program(academic program)

Enter an academic program.
- Status

Select a status to view applicants with a particular program status. For example, you might want to view only those applicants with a *Cancelled* or *Waitlisted* status.
- Acad Career(academic career), Admit Term, Admit Type, and Status

Select an option to view prospects by academic career, admit term, admit type, or status.
- Search

Click this button to view the applicants that match your search criteria. The system displays matches in the bottom portion of the page.

Carry ID	Click this button to carry forward this person's ID to the next page.
Applicant Programs	Click this link to view the applicant program details. The Applicant Programs page appears.
Org Primary Location (organization primary location)	Click this link to view the primary address of the organization or school. The Organization Primary Location page appears.
Contact Information	Click this link to view contacts that are associated with this school. The Contact Information page appears.

Viewing Prospects and Applicants Assigned to a Specific Recruiter

This section discusses how to:

- View prospects assigned to a specific recruiter by category.
- View applicants assigned to a specific recruiter by category.
- View prospects assigned to a specific recruiter by region.
- View applicants assigned to a specific recruiter by region.

Pages Used to View Prospects Assigned to a Specific Recruiter by Category

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Prospects by Category	RCR_PRSP_CAT_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Prospects By Category	View lists of prospects that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Prospect Program link on the Prospects by Category page.	View a listing of programs for a prospect.
Applicants by Category	RCR_APPL_CAT_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants by Category	View lists of applicants that are associated with a particular recruiter for any category to which the recruiter is assigned and determine the order in which the records appear.

Page Name	Definition Name	Navigation	Usage
Program Summary	ADM_APPL_P_SEC	Click the Program Detail link on the Applicants by Category page.	View a list of programs for an applicant.
Prospects by Region	RCR_PRSP_REG_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Prospects by Region	View lists of prospects that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.
Prospect Programs	ADM_PRSPCT_R_SEC	Click the Prospect Programs link on the Prospects by Region page.	View any program information that exists for a prospect.
Applicants by Region	RCR_APPL_REG_SUMM	Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants By Region	View lists of applicants that are associated with a particular region and assigned to a particular recruiter and determine the order in which the records appear. For example, you can search by the last school attended or by region.

Viewing Prospects Assigned to a Specific Recruiter by Category

Access the Prospects by Category page (Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Prospects By Category).

Prospects By Category

Applicants By Category

Prospects By Region

Applicants By Region

Institution: PeopleSoft University

Career: Undergraduate

Recruiter ID: ADREC1

Name: Chavez,John Joseph

Select Prospects By

Sort Prospects By

Admit Term:

Group: Academic

Category:

Responsible:

Admit Term

Category

Group

Search

Find | View All

First 1-6 of 7 Last

	ID	Name	Admit Term	Applied	Category	Group	Primary	
Carry ID	AD5211	Reiter,Eric	2001 Sprng	☒	Honors Stu	Academic	☐	Prospect Program
Carry ID	AD5213	Rice,Lisa	2001 Sum	☒	Honors Stu	Academic	☒	Prospect Program
Carry ID	AD5201	Berry,Kim	2001 Sum	☐	Honors Stu	Academic	☐	Prospect Program
Carry ID	AD5221	Yost,Linda	2001 Sum	☐	Honors Stu	Academic	☐	Prospect Program
Carry ID	AD5205	Howe,Craig	2001 Fall	☒	Honors Stu	Academic	☐	Prospect Program
Carry ID	AD5207	Hume,Janice	2001 Fall	☒	Honors Stu	Academic	☒	Prospect Program

Prospects by Category page

Select Prospects By Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.

Admit Term Enter an admit term to view prospects for a specific term.

Category Enter a recruiting category to narrow which prospects you want to see. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of category.

Note. You cannot search on *REGN* on this page. To search on region, access the Prospects by Region page.

Group Select a recruitment group to search for a broader recruiting group.

Responsible Select a value to view only prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all prospects, regardless of the recruiter's responsibility role.

Admit Term,Category, and Group Select an option to view prospects by admit term, category or group.

Search Click this button to view prospects that match your search criteria.

Carry ID Click this button to carry forward this person's ID to other pages that you access.

Prospect Program Click this link to access the Prospect Programs page and view a list of programs for a prospect.

Viewing Applicants Assigned to a Specific Recruiter by Category

Access the Applicants by Category page (Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants by Category).

Prospects By Category		Applicants By Category		Prospects By Region		Applicants By Region	
Institution:	PeopleSoft University	Career:	Undergraduate				
Recruiter ID:	ADREC1	Name:	Chavez,John Joseph				
Select Applicants By				Sort Applicants By			
Admit Term:		Group:	Academic	☐ Category		Search	
Acad Prog:		Status:		☐ Group			
Category:		Responsible:					
Find View All First 1-5 of 5 Last							
Carry ID	ID	Name	Appl Nbr	Admit Type	Category	Group	Primary
Carry ID	AD5205	Howe,Craig	00022817	Transfer	Honors Stu	Academic	☒
Carry ID	AD5207	Hume,Janice	00022818	Transfer	Honors Stu	Academic	☒
Carry ID	AD5211	Reiter,Eric	00022821	First-Year	Honors Stu	Academic	☒
Carry ID	AD5213	Rice,Lisa	00022823	First-Year	Honors Stu	Academic	☒
Carry ID	AD5217	Schadt,Randle	00022826	First-Year	Honors Stu	Academic	☐
							Program Detail

Applicants by Category page

Select Applicants By

Enter the appropriate values that designate which applicants you want to see. You must complete at least one field as search criteria.

Admit Term

Enter an admit term to view applicants for a specific term.

Acad Program(academic program)

Enter an academic program to specify a particular program.

Category

Enter a recruiting category to narrow the list of applicants you want to see. Leave this field blank if you want all applicants that are assigned to this recruiter, regardless of category.

Note. You cannot search on *REGN* on this page. To search on region, access the Applicants by Region.

Group

Select a recruitment group to search for a broader recruiting group.

Status

To view only applicants with a certain program status, select a value in the status field.

Responsible

Select a value to view only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all applicants, regardless of the recruiter's responsibility role.

Admit Term,Category, Group, and Status

Select an option to view applicants by admit term, category, group, or status.

Search

Click this button to view the applicants that match your search criteria.

Carry ID

Click this button to carry forward this person's ID to other pages that you access.

Program Detail

Click this link to access the Program Summary page and view a list of programs for an applicant.

Viewing Prospects Assigned to a Specific Recruiter by Region

Access the Prospects by Region page (Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Prospects by Region).

Prospects By Category		Applicants By Category		Prospects By Region		Applicants By Region	
Institution:	PeopleSoft University	Career:	Undergraduate				
Recruiter ID:	ADREC1	Name:	Chavez,John Joseph				
Select Prospects By				Sort Prospects By			
Admit Term:		Region:	AZ	☒ Admit Term ☐ Lst School ☐ Region			
Last School Attended:				Search			
Responsible:							
Find View All First 1-6 of 6 Last							
Carry ID	ID	Name	Admit Term	Applied	Region	Last School Attended	Primary
Carry ID	AD5200	Bish,Jane	2001 Sprng	☒	AZ	Ironwood	☒ Prospect Program
Carry ID	AD5212	Reyes,Tony	2001 Sprng	☒	AZ	Ironwood	☒ Prospect Program
Carry ID	AD5216	Sawyer,Harold	2001 Sum	☒	AZ	Apache	☒ Prospect Program
Carry ID	AD5204	Artz,Larry	2001 Sum	☒	AZ	Apache	☒ Prospect Program
Carry ID	AD5210	Loomis,Doris	2001 Fall	☐	AZ	Apache	☒ Prospect Program
Carry ID	AD5220	Wright,Martha	2001 Fall	☒	AZ	Apache	☒ Prospect Program

Prospects by Region page

Select Prospects By

Enter the appropriate values that designate which prospects you want to see. You must complete at least one field as search criteria.

Admit Term

Enter an admit term to prospects for a specific term.

Region

Enter a region to limit the list of prospects. Leave this field blank to view all prospects that are assigned to this recruiter, regardless of region.

Last School Attended

Enter a value to search for prospects by the last school that they attended.

Responsible	Select a value to view only those prospects for whom this recruiter is the primary recruiter. You can also view only those prospects for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all prospects, regardless of the recruiter's responsibility role.
Admit Term, Lst School (last school attended), and Region	Select an option to view prospects by admit term, last school attended, or region.
Search	Click this button to view the prospects that match your search criteria.
Carry ID	Click this button to carry forward this person's ID to other pages that you access.
Prospect Program	Click this link to access the Prospect Programs page and view details about the program or programs that are related to a prospect's academic career.

Viewing Applicants Assigned to a Specific Recruiter by Region

Access the Applicants by Region page (Student Recruiting, Student Recruiters, Summaries, Recruiter Summary, Applicants By Region).

Prospects By Category		Applicants By Category		Prospects By Region		Applicants By Region	
Institution:	PeopleSoft University	Career:	Undergraduate				
Recruiter ID:	ADREC1	Name:	Chavez,John Joseph				
Select Applicants By				Sort Applicants By			
Admit Term:		Region:	AZ	☐ Last School		Search	
Acad Prog:		Status:		☐ Region			
Responsible:							
Last School Attended:							
Find View All First 1-4 of 4 Last							
Carry ID	ID	Name	Appl Nbr	Admit Type	Region	Last School Attended	Primary
Carry ID	AD5200	Bish,Jane	00022813	First-Year	AZ	Ironwood	☒ Program Detail
Carry ID	AD5204	Artz,Larry	00022816	Transfer	AZ	Apache	☐ Program Detail
Carry ID	AD5212	Reyes,Tony	00022822	Transfer	AZ	Ironwood	☐ Program Detail
Carry ID	AD5220	Wright,Martha	00022828	First-Year	AZ	Apache	☐ Program Detail

Applicants by Region page

Select Applicants By	Enter the appropriate values that designate which applicants you want to view. You must complete at least one field as search criteria.
Admit Term	Enter an admit term to view applicants for a specific term.
Region	Enter a region to limit the list of applicants. Leave this field blank to view all applicants that are assigned to this recruiter, regardless of region.

Acad Prog (academic program)	Enter an academic program to specify a particular academic program.
Status	Status an application status to view applicants with a particular status.
Responsible	Select a value to view only those applicants for whom this recruiter is the primary recruiter. You can also view only those applicants for whom this recruiter is not the primary recruiter. Do not select a value if you want to select all applicants, regardless of the recruiter's responsibility role.
Last School Attended	Enter a value to search for applicants by the last school that they attended.
Admit Term, Lst School (last school attended), and Region	Select an option to view applicants by admit term, last school attended, or region.
Search	Click this button to view the applicants that match your search criteria.
Carry ID	Click this button to carry forward this person's ID to other pages that you access.
Program Detail	Click this link to access the Program Summary page and view a list of the programs for an applicant.

Chapter 17

Adding and Updating Applications

This chapter discusses how to:

- Add new applications manually.
- Add new prospects and applications with quick admit.
- Create applications from external test score data.
- Update applications.
- View application summary information.
- Calculate application fees in batch.
- Record the basis of admission.
- Record comments and conditions for admission.
- Viewing summary checklist, comment, and communication data.

See Also

Chapter 13, "Tracking Supporting Prospect and Applicant Information," Prerequisites, page 149

"Research Tracking Additions to Admissions Functionality" and "Program Enrollment Additions to Admissions Functionality" documents in the Recruiting and Admissions documentation package for Bundle 24 (CS_Bundle_24_Recruiting_and_Admissions_9_0.pdf). This package is available on My Oracle Support (CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 — Doc ID 1400708.1)

Adding New Applications Manually

If the applicants you are entering do not already exist in your database, the system creates them and assigns them identification numbers.

The first two pages in this component store information regarding the applicant as a *person*. This data is shared between all applications for an applicant, as well as with prospect personal data. Updating biographical data here updates it throughout the database. The last three pages in this component, however, are application-specific pages, meaning they store information unique to this *application*. In other words, applications share biographical data but application data is unique to each application.

Avoid entering duplicate applications. Specify on the Installation Defaults - AD page at what level you want the system to warn you that a potential duplicate application exists.

See [Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 25.](#)

The Student Admissions , Add Application component is the second of three very similar components:

- Student Recruiting , Create/Update Prospects component.
- Student Admissions, Add an Application component.
- Student Admissions, Maintain Applications component.

Create/Update Prospect and Add an Application have a Biographical Data page and a Regional page. All three components have other pages with similar names such as Prospect Program Data page and Application Program Data page. Use these components to enter or maintain similar information at different times during your business processes: for entering prospects, for entering application data, and for maintaining application data.

This section lists prerequisites and discusses how to:

- Enter or update applicant biographical data.
- Enter or update applicant regional data.
- Enter application program data.
- Update or add application regional data.
- Use the Calculate Deposit Fees page.
- Enter application data.
- Use the Application Fees page.
- Use the Application Items page.
- Enter recruiting information for an application.
- Add communications, checklists and comments for applicants.

Prerequisites

Before you begin entering application data, determine if the person is already in your Student Administration database. Often an applicant already has a system ID because an administrator already entered the person as a prospective student. For example, if a person sent test scores to your institution, it is likely that he or she is already in the system.

To see if the applicant is already in your system, select Student Admissions, Application Entry, Search Match.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

Pages Used to Add New Applications Manually

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Biographical Details	SCC_BIO_DEMO_PERS	Student Admissions, Application Entry, Add Application, Biographical Details	Enter an applicant's biographical information.
Addresses	SCC_BIO_DEMO_ADDR	Student Admissions, Application Entry, Add Application, Addresses	Enter an applicant's address.
Regional	SCC_BIO_DEMO_REG	Student Admissions, Application Entry, Add Application, Regional	Enter region specific information, if applicable, based on country code.
Application Program Data	ADM_APPL_PROG_ENT	Student Admissions, Application Entry, Add Application, Application Program Data	Enter program data and academic plan data pertaining to this application. You can also create an enrollment deposit and matriculate an applicant from this page. You must track applications at least at the plan level, but any lower level tracking depends on your office policies.
Application Regional	SAD_APPL_REG_DATA	- Student Admissions, Application Maintenance, Maintain Applications - Student Admissions, Application Entry, Add Application	Add or update country-specific data regarding the application.
Evaluation	ADM_APPL_EVAL1_SEC	Click the Evaluation link on the Application Program Data page.	Add an evaluation status for this program.

Page Name	Definition Name	Navigation	Usage
Deposit Fees	ADM_APPL_DEP_FEE	Click the Calculate Deposit Fees link on the Application Program Data page.	Calculate a deposit fee when entering a new application. You can calculate the deposit owed for enrollment and post that charge to the person's account directly from the Application Program Data page as part of adding a new application. If the application has a program status of admitted, the Calculate Deposits Fees link becomes available if a value is defined on the Application Center Table.
Deposit Fees (entry)	ADM_APPL_ENTRY2_S	Click the Calculate Deposit Fees button or the Deposit Fees link on the Deposit Fees page.	Enter deposit fees for the applicant. Note. When this deposit posts in PeopleSoft Student Financials, the system updates the program action to matriculation if you selected the Create Student check box on the Status Update page.
Application Data	ADM_APPL_DATA	Student Admissions, Application Entry, Add Application, Application Data	Enter additional information regarding the application and to calculate an application fee. The system stores data on this page at the <i>application</i> level, as opposed to storing it under a person or academic program. This data is relevant to all academic programs being applied to with this application.
Application Fees	APP_FEE_CALC_MSG	Click the Calculate Application Fees link on the Application Data page.	Calculate the application fee that the person owes. If fees were calculated in the AAWS on line application and a payment was sent to the GL, fees are not recalculated when you click this link.

Page Name	Definition Name	Navigation	Usage
Tender Details	ADM_APPL_TNDRCC_SP	Click the Show Tender Details link on the Application Fees page. The Tender Details page is accessible when you select the Credit Card tender category on the Application Fees page.	Enter credit card information. <i>See PeopleSoft Student Financials 9.0 PeopleBook, "Cashiering," Accepting Student Payments.</i>
Tender Details	ADM_APPL_TENDER_SP	Click the Show Tender Details link on the Application Fees page. The Tender Details page displays when you select the Check or Cash tender category on the Application Fees page.	Enter check or cash information. <i>See PeopleSoft Student Financials 9.0 PeopleBook, "Cashiering," Accepting Student Payments.</i>
Currency Conversion	APPL_FEE_CURR_SP	Click the Currency Detail link on the Application Fees page.	Obtain details on the currency conversion.
Application Items	ADM_APPL_ENTRY3_S	Click the Transaction Summary link on the Application Data page to view information about the application fee for this application.	Review information about the application fee for an applicant.
Tender Details	PAYMENT_TENDER_SP	Click the Show Tender Details link on the Application Items page.	View tender details.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions, Application Entry, Add Application, Application School/Recruiting	Enter recruiting information about an applicant.

Entering or Updating Applicant Biographical Data

Access the Biographical Details page.

Use this page to enter and update the known biographical and demographic data for an applicant.

If, by performing search/match, you find that the person does *not* yet have an ID in your database, the key dialog prompt says *NEW* in the ID field because you are adding a new person as well as a new application. The application number will be all zeros.

Note. Leave the Application Number field as all zeros in order for the auto-numbering feature to work properly.

If you find the person in your search/match and used the Carry ID option, your key dialog prompt lists that person's ID. The application number is still all zeros.

If the person exists in your database, it is a good idea to see if an application has already been entered. You do *not* want to enter a duplicate application. Go to the Maintain Applications component to determine if the person has any current applications.

If you find a matching ID during your search process, the Biographical Data page displays existing data about this person. If you do not find a matching ID during your search process, then you add a new person as well as a new application. The page is blank except for those fields populated according to your user defaults.

After running a search/match, select Student Admissions, Application Entry, Add Application to add a new application.

Entering or Updating Applicant Regional Data

Access the Regional page.

Use this page to enter biographical information specific to your installation country. If this person is already in your database and has existing information, you can view it on this page.

Entering Application Program Data

Access the Application Program Data page.

Biographical Details		Addresses		Regional		Application Program Data		Application Regional		Application Data	
John Roberts						AD1000					
Academic Institution:		PeopleSoft University				Application Number:		00022581			
Academic Career:		Undergraduate				Career Number:		0			
Program Data Find View All First 1 of 1 Last											
Program Number:		0				Effective Date:		02/16/2006			
*Admit Term:		0570 2006 Fall				Effective Sequence:		1			
*Academic Program:		LAU Lib Arts				Expected Graduation Term:					
*Academic Load:		Full-Time				*Campus:		WALCR Walnut			
☐ Joint Program											
Program Status											
Status:		Applicant				Action Date:		08/24/2006			
*Program Action:		APPL Application				Action Reason:					
Evaluation											
Plan Data											
*Academic Plan:		UNDECL-UG Undeclared Undergraduate						Major			
Sub-Plan Data											
*Sub-Plan:											
Transfer To:		Education				Go					

Application Program Data page

Note. The system fills in most of the fields on the Application Program Data page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, the system populates some fields according to those defaults. For example, depending on your default setup, the system might populate academic career, institution, admit term, academic load, and academic program data based on the values in the matching prospect record.

Note. Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Effective Date

Enter an effective date for the application to this academic program if different than the default date. If you are entering the application after the start date of the admit term, you need to back date the effective date to a date prior to the start date of the admit term in order to term activate the student once they are matriculated.

Admit Term

Enter the admit term in which the applicant is expected to enroll, if he or she is admitted for this application. Define admit terms on the Term Table page. This is a user default field.

Expected Graduation Term	Enter the term in which the student expects to graduate.
Academic Program	Enter or update the academic program to which the person is applying. Define academic programs on the Academic Program page. This is a user default field. After you matriculate the applicant, the system copies the application program data to the program/plan tables in PeopleSoft Student Records.
Academic Load	Select the academic load that the applicant will be taking on if admitted for this application. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Full-Time</i> and <i>Part-Time</i> .
Joint Program	Select the Joint Program check box if the applicant is applying to a joint program.
Dual Program	This field becomes available when you select the Joint Program check box. Enter the joint academic program. Define dual programs on the Academic Program page.
Campus	Enter or update the campus to which the person is applying within your academic institution. Define campuses on the Campus Table page. This is a user default field.
Status	Because you are entering a new application, this field automatically displays <i>Applicant</i> .
Program Action	Because you are entering a new application, this field automatically displays <i>Application</i> . This value can be changed. Program actions are predefined on the Admissions Action Table page and should not be modified.
Action Date	The default for the action date is your system date. This is the date that the action was actually entered into the system (contrast this with the effective date).
Action Reason	If there are action reasons associated with the program action that you selected, you can select the appropriate reason value. Action reasons enable you to record a brief explanation of why the program action took place. For example, for the action <i>WADM (Administrative Withdrawal)</i> , you could define a reason of <i>Incomplete Application</i> . Define action reasons on the Program Action Reason Table page.
Career Number	Available if the Program Action field contains the value <i>Readmit Application</i> . If you want to readmit this applicant for this application into an existing career, you can select the proper career number here. You must also have an admit type where the Readmit Processing Required check box has been selected on the Admit Type Table page. The system readmits the person into the career that corresponds to the career number that you select.

Academic Plan	Enter the academic plan within the academic program being applied to with this application. An academic plan can be any area of study, such as English, math minor, physics, or undeclared. Define academic plans on the Academic Plan Table page. This is a user default field.
Sub-Plan	If a subplan exists for the academic plan, enter the subplan here. Define academic subplans on the Academic Sub-Plan Table page. This is a user default field.
Calculate Deposit Fees	Click this link to calculate an enrollment deposit. The Calculate Deposit Fees Page appears. If your application center has designated a deposit fee code that requires a deposit, and you enter a program status of <i>Admit</i>, the Calculate Deposit Fees link appears. You can not exit the component until you calculate the enrollment deposit. Application centers are designated on the Application Data page.
Evaluation	Select this link to enter the status of the application. Values for this field are defined on the Evaluation Status Table.
Create Program	To matriculate the applicant at the same time you are entering the new application, select <i>Matriculation</i> in the Program Action field. The Create Program button becomes available. Click the Create Program button to save the component. Also, note that if you select <i>Matriculation</i> in the Program Action field, you are <i>required</i> to click the Create Program button (which, again, saves the component) before exiting the component. After you matriculate a person, the system creates a record in Student Records. All fields on this page are unavailable because to access the information you need access to pages in Student Records. Therefore, if you must make a change to this person's record after matriculation, you must do so through Student Records. The Recruiting and Admissions application enables you to record multiple academic programs for one application under an academic career. After you have saved the Application Entry component, however, you must use the Program Addition page to add an additional program. Note that the Prog Number field shows the number of the program in the order it was entered. For example, if you only have one program, it displays <i>0</i>. The next program displays <i>1</i>. Before matriculating the applicant, you might want to move to the next page in the Application Entry component first to record additional information about the applicant before you perform the matriculation process.
Go	Click this button to go to another component.

Updating or Adding Application Regional Data

Access the Application Regional page.

Application RegionalApplication DataApplication School/RecruitingApplication Student Response

Damien Crowther

ADAUS005

Academic Institution: PeopleSoft Australia Uni

Academic Career: Undergraduate

Application Number: 00024433

Australia

Program Data

Find | View All

First1 of 1Last

Program Number:0

Effective Date:08/03/2009

Admit Term:06292009 Sem2

Effective Sequence:1

Academic Program:BENGBEng

*Mode of Attendance:Internal Mode of Attendance

Cohort:09002009 Commencing

Funding Source:CSPCommonwealth Supported Place

Application Regional page: Australia

New Zealand

Program Data

Find | View All

First1 of 1Last

Program Number:0

Effective Date:06/27/2006

Admit Term:05052003 Fall

Effective Sequence:1

Academic Program:LAULib Arts

*Funding Source:Full Fee Domestic Student

Application Regional page: New Zealand

 Netherlands

Program Data

Find | View All | First 1 of 1 Last

Program Number:0

Effective Date:06/27/2006

Admit Term:05052003 Fall

Effective Sequence:1

Academic Program:LAULib Arts

Program Information

BRINcode:

Institution City:

Program Code:

Alt Program Code:

Academic Year:

Start Month:

Higher Education Additional Information

Studieliink Status:

Enrollment Requested

Admission Verification

Deficiency Status:

Prof Requirements Status:

Professional Duties Status:

Language Test Status:

First-year Student:

Transmit

Last Transmit Date

[Student Prior Education](#)

[Student Data Higher Education](#)

[Student Messages](#)

Application Regional page: Netherlands (1 of 2)

Payment Information	
Payment Indicator:	
Payment Amount:	
Form of Payment:	
Paid by:	
Payment Method Name:	
Payment Account:	☐ Payment Terms

Lot Drawing	
Lot Drawing Type:	
Study Preference:	
IBG Status:	Lot Drawing Date:
IBG Status Reason:	
Lot Drawing Result:	
Lot Drawing Number:	

Additional Information	
Form of Study:	
Academic Level:	
	☐ Funding Applies

Application Regional page: Netherlands (2 of 2)

You can add or update country-specific application data on this page. The page and the appropriate data appear based on the country options that you select on the following pages:

- (AUS, NLD, NZL) Academic Institution Table, Academic Institution 6 page.
- (NLD) Student Admin Installation, SA Features page.

(AUS) Australia and (NZL) New Zealand Functionality

(AUS) Mode of Attendance The Mode of Attendance field is a required field that is populated on each student's application. This data is required for reporting admissions data to the TACs via the Enrollment Feedback process as well as reporting element 329 Mode of Attendance code in DEEWR Data Collections.

The Mode of Attendance field resides on Application Entry, Application Maintenance, and Program Addition pages. It is a required field when you enter an application. After the student is matriculated, the mode of attendance is carried forward to the student program.

(AUS) Cohort (Optional) Select a cohort for the student that the system will use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected. After the student is matriculated, the cohort is carried forward to the student program.

(AUS) Funding Source (Optional) Select a funding source for the applicant to represent the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DEEWR Applications & Offers Collection.
See *PeopleSoft Student Records 9.0 PeopleBook*, "(AUS) Generating Government Reports," Generating the Applications and Offers Files.

(NZL) Funding Source This field is populated at application data entry time and is used in the Single Data Return process. The system uses the funding source that you enter as a default on the enrollment record for the student.

(NLD) Netherlands Functionality

Form of Study Enter the form of study for which the applicant is registering.

Academic Level The academic level can be registered separately from the academic program record.

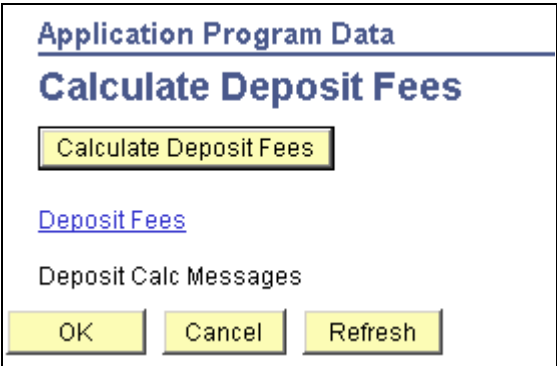
Funding Applies Select this option to indicate whether funding applies.

Prior Education Before a student can enroll in a program, the student has to meet certain requirements concerning his or her curriculum. One of these requirements is the fact that the student has obtained a diploma from their previous school. The diploma received will reflect a specific level of education. Individual exam results are relevant. On a student level all prior education, including information about the school(s), courses taken and subjects passed, have to be registered.

Note. To make changes to this page after it has been saved, you must do so through the Maintain Applications component. If you are only entering one program for the applicant, enter only one program action on the Application Program Data page. You must enter additional program actions through the Maintain Applications component. For example, suppose you enter the application initially with a program action of *APPL* in the Add Application component. When you admit the applicant, you would enter the program action of *Admit* in the Maintain Applications component.

Using the Calculate Deposit Fees Page

Access the Calculate Deposit Fees page.



Calculate Deposit Fees page

Calculate Deposit Fees	Click this button to access the Deposit Fees page where you can calculate an enrollment deposit fee.
Deposit Fees	Click this link to access the Deposit Fees page where you can view details about a person's enrollment deposit.
Deposit Calc Messages (deposit calculation messages)	Click this link to view messages that occur while attempting to calculate deposit fees. This link becomes available when the system generates a message.

Entering Application Data

Access the Application Data page.

Biographical Details	Addresses	Regional	Application Program Data	Application Data	Application School/Recruiting

Gregory Keith ADCRM1000

Academic Institution: PeopleSoft University **Academic Career:** Undergraduate **Application Number:** 00024567

Application Data

*Application Center: UGRD Undergrad *Admit Type: FYR First-Year

*Application Date: 06/13/2008 Academic Level: Freshman

*Created On: 06/13/2008 *Notification Plan: Regular

☐ Prior Application Application Method: Hard Copy

Additional Information

Housing Interest: On Campus ☒ Financial Aid Interest

File Information **Application Fee Information**

Complete: ☐ Date: Status: Need Recalculation [Calculate Application Fees](#)

External Application Nbr: Fee Type: Standard [Transaction Summary](#)

[Display Errors / Warnings](#)

File Attachments Customize | Find | View All | First 1 of 1 Last

Attached File	Description	View
Recommendation_Letter_CZ011.doc	Recommendation Letter for Gregory	View

[Add](#)

Transfer To: Education [Go](#)

Application Data page

Note. The system populates most of the fields on this page according to your user defaults. If the applicant had a prospect record and your setup dictates that data from the prospect record is to be copied to the application, the system populates some fields according to those defaults.

Application Center

Enter the application center that will process this application. This information helps you track which office is managing specific applications. Define application centers on the Application Center Table page. This is a user default field.

Admit Type

Enter the admit type for this application (for example, *First-Year* or *Transfer*). Define admit types on the Admit Type Table page. This is a user default field.

Application Date

The default for the application date is the system date that the application was received. You can override this default.

Academic Level

Select the academic level to which the applicant is applying for admission. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Freshman*, *Graduate*, *Junior*, *Not Set*, and *Post-Baccalaureate*. This is a user default field.

Created On	The default for the created date is the system date on which you create this application record.
Notification Plan	Specify whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Early Admit</i> , <i>Regular</i> , and <i>Rolling</i> .
Prior Application	Select this check box if this applicant previously applied to this career. This selection is useful for informational and reporting purposes.
Application Method	Select a value to indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Application Service</i> , <i>Diskette</i> , <i>Hard Copy</i> , <i>Web Application</i> , <i>EDI</i> , and <i>OUAC</i> . This is a user default field.
Housing Interest	Enter any housing interest indicated by the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Commuter</i> , <i>Off Campus</i> , and <i>On Campus</i> . This is a user default field.
Financial Aid Interest	Select this check box if this applicant is interested in financial aid for the programs to which he or she is applying. This field is useful for informational and reporting purposes. For example, the financial aid office can run reports listing those applicants interested in financial aid. This is a user default field.
Complete	Select this check box if this application is not missing any information and is considered complete by your office.
Date	Enter the date that you marked this application as complete.
External Application Nbr (external application number)	Enter the external application number if you received this application from a service with its own application-numbering scheme.
Fee Type	Select the type of fee assigned to this application. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>International</i> , and <i>Standard</i> . These fee types enable you to charge varying user-defined application fees.

Calculate Application Fees

You can use the Application Fees Calculation process to calculate application fees based on the Application Fee Code structure which is attached to the Application Center. The fee is calculated based on core production data—application program data. Application fees may or may not be posted to the student account. An administrator can waive the fee. The waiver is associated with an item type defined on the Application Fee Code setup. Both the application fee and waiver are posted to the student account.

If you calculate application fees based on core production data, then after selecting the fee type, click the Calculate Application Fees link to calculate the application fee owed. The Application Fees Calculation process runs and the Application Fees page appears. The system displays the calculated fee amount.

When you return to the Application Data page, the Status field in the Application Fee Information group box displays *Calculated*.

If your application fee is set up to post to PeopleSoft Student Financials, the Application Fees calculation process runs when you click the Run button on the Application Fees page. A COBOL posting program runs which creates an account for this person in PeopleSoft Student Financials.

If you use the Admission Applications Web Services (AAWS), fee calculation does not rely on Admissions production data. If a fee is required, *fee calculation occurs during the application submit process via the web service*, using the data stored in the AAWS staging table. With the exception of the maximum amounts on the Minimum/Maximum Fee Code (which rely on the charges posted to the student account), the AAWS fee calculation process produces the same amounts as the production data Application Fee Calculation process.

Note. Application fees and payments are *not* posted to the student account for AAWS. Regardless of any setup in the Application Fees component, all AAWS transactions are posted to the general ledger using the Direct to GL process.

For AAWS application fee processing, if Yes is selected for the Application Fee Required field on the Application Center Table page *and* the Amount Sent to GL value is greater than zero, then when you click the Calculate Application Fees link, the fee is not recalculated. The link takes you to the Application Fees page where you can view the results of AAWS application fee and waiver processing.

See [Chapter 2, "Building Your Recruiting Structure," Setting Up Application Processing Centers, page 14.](#)

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Using Admission Applications Web Services, Payment Integration Web Service Operations

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Setting Up Fees and Tuition Groups," Setting Up Application Fees.

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Using GL Interface Processing," Generating Direct to GL Entries.

Status	For AAWS fee and waiver processing, the value in this field is updated based on staging table data for SAD_APL_DAT_STG.APP_FEE_STATUS.
Transaction Summary	Click this link to view information about the application fee for this application. The Application Items Page appears.
Display Errors/Warnings	If any errors occurred during the calculation, click this link to view error details.
Go	Click this button to go to another component.

Note. After this page has been saved, you make changes to this application in the Application Maintenance component.

File Attachments

Use this group box to add, delete and view attachments for an admissions application.

Add	Click to access standard PeopleTools functionality to browse to a file and upload it

View	Click the link to open the attachment in a new window.

The Audit tab displays all updates to attachments, including user name and date/time.

Using the Application Fees Page

Access the Application Fees page.

Application Data

Application Fees

Fee Amount:

20.00

USD

Fee Paid:

20.00

USD

Date:

11/23/2010

*Fee Status:

Received

Waive Amount:

USD

Waiver Basis Code:

Find | View All

First

1 of 3

Last

*Tender Category	Tender Amount	*Currency		
Credit Card	20.00	USD	Show Tender Details	Currency Detail
Cash		USD	Show Tender Details	Currency Detail
Electronic Check		USD	Show Tender Details	Currency Detail

Application Fees page

Note. You cannot authorize/capture credit card or electronic check payments through Admissions Application Fee Payment.

To adhere to PCI compliance regulations, you should not store credit card numbers in your database.

Date

The default for this date is your system date. Edit this field to reflect the date the application fee was entered or waived.

Fee Status

Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Deferred*, *Pending*, *Received*, *Waived*, and *Waiver*.

If you calculate fees from production data, using the Application Fee Calculation process, select a status for this application fee. If you are receiving the application fee, change the status of the fee to *Received*. After you change the status to *Received*, the fields in the lower section of the page become available.

For information about how to use this page for AAWS application fee and waiver processing:

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

Waive Amount

Enter the amount of the application fee that will be waived, if appropriate.

For AAWS, if manual reconciliation is required, you enter the waive amount in the Application Data staging page and it appears here after the data is posted.

Waiver Basis Code

The field is available for edit only if the value in the Fee Status field is *Waived* or *Waiver*.

For information about how this field is populated by AAWS fee processing:

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

Tender Category

Use this field to designate how the fee payment was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Credit Card*, *Electronic Check*, *Check*, or *Cash*.

You have the flexibility to receive payments in multiple tenders. For example, you can waive a portion of a fee and the student's remaining payment can be split between a credit card and a check.

If you enter *Credit Card*, *Electronic Check*, or *Check*, the Tender Details page appears so you can enter further information.

If you do not use AAWS fee processing, you can enter information about the echeck or credit card, although the authorize/settle must be completed outside of Campus Solutions.

Hosted payment authorize/settle functionality is available only through AAWS fee processing.

For AAWS fee processing, if payment is required at the time of the application, the value that appears here is carried through on posting from the Application Transactions staging component. You enter a value here only if the applicant is allowed to pay later or if the waiver request was denied in the Application Maintenance component and payment was received later.

Note. For AAWS, partial payment is not allowed and applicants cannot split payments between credit card and check.

Tender Amount

After entering a form of payment, enter the amount tendered.

For information about AAWS fee processing, refer to the previous documentation about the Tender Category field.

Currency

Enter the type of currency, such as *USD* (US Dollars).

For information about AAWS fee processing, refer to the previous documentation about the Tender Category field.

Currency Conversion Details

Click this link to obtain details on the currency conversion. The Currency Conversion Page appears.

Show Tender Details

Click this link to view details about the application fee. The Tender Details page appears.

Using the Application Items Page

Access the Application Items page.

Application Data				
Application Items				
ID:	0162	Application Number:	00024824	
Application Fee Date:	11/23/2010	Fee Amount:	20.00 USD	
Status:	Received	Fee Paid:	20.00 USD	
Waiver Basis Code:		Amount Sent to GL:	20.00 USD	
Customize Find View All First 1 of 1 Last				
Item Description	Account Number	Short Description	Amount	
			0.00	

Application Items page

Use the Application Items page to view the results of application fee processing. Application fees are processed using production data or, for AAWS, via the web service, using staging data.

The Amount Sent to GL field applies to AAWS fee processing and is populated based on the value in the related field in the Application Transactions staging component.

Set up waiver basis codes on the Application Fee Waiver Basis page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Fee Waiver Basis).

Note. To view a summary of a person's financial account, access the Customer Accounts page in PeopleSoft Student Financial.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

See [Chapter 2, "Building Your Recruiting Structure," Setting Up Application Processing Centers, page 14.](#)

See *PeopleSoft Student Financials 9.0 PeopleBook*, "Using GL Interface Processing," Generating Direct to GL Entries.

Entering Recruiting Information for an Application

Access the Application School/Recruiting page.

Biographical Details		Regional		Application Program Data		Application Data		Application School/Recruiting	
Al Smith				0021					
Academic Institution		PeopleSoft University							
Academic Career:		Undergraduate		Application Number:		00024144			
Events									
School Information									
Last School Attended:		000010096		Richmond College					
Graduation Date:		06/04/1998							
School Type:		Secondary		Proprietorship:					
City:				State:		Country:			
Recruiting Information									
Region:		CCOAST		CA Central Coast					
From:		Region Tree							
Primary Recruiter ID:		AD1041		Bill Dern		Staff			
Assign Region From Home Postal Code School Postal Code									
Recruiting Categories Find View All First 1 of 1 Last									
*Category:		HGPA		High GPA		Group:		Academic	
Sub-Cat:		High							
Description:									
Recruiters Find View All First 1 of 1 Last									
Recruiters Prompt		*Recruiter ID		Recruiter Type		Primary:			
☒ Recruiters		AD1041		Bill Dern		Staff		☒	
Transfer To:		Education		Go					

Application School/Recruiting page

Note. If the applicant had a prospect record, and you selected the Move to Application option on the Prospect Recruiters page, and your setup dictates that data from the prospect record be copied to the application, the system automatically populates some of the fields on this page. For example, the Last School Attended and Graduation Date fields could be populated by the values in the matching prospect record.

School Information

Last School Attended

Enter the last school attended for this applicant. Because a person might have attended several schools in his or her external academic career, it is helpful to know which school was attended most recently. This is a user default field.

Upon the first save of the application, the value entered in this field is added to the Education component automatically. After you enter a school, you might receive a message informing you that this school will not be added to the Academic History record, depending on how your institution has set this parameter on the Installation - AD page. Schools are stored for academic history in the Education component. The school you store here is for recruiting and informational purposes.

Graduation Date Enter the graduation date. A graduation date can be in the future if the person is still attending this school.

Recruiting Information

Region Enter a region if you want to choose a region from the region tree manually. Only regions from your region tree are available for selection. Define regions on the Region Table page.

Home Postal Code Click this button if you want the system to assign a region based on the postal code in the applicant's home address. The system uses the tree manager to assign a region based on the postal code.

School Postal Code Click this button if you want the system to assign a region based on the applicant's last school attended postal code. The system uses the tree manager to assign a region based on the postal code.

From This display-only field shows you how this region was defined:
Region Tree: If you *manually* assigned a region.
Address: Assigned if you click the Home Postal Code button.
School: Assigned if you click the School Postal Code button.

Recruiting Categories

Use the fields in this group box to target the applicant for special recruiting efforts during the admissions process regarding this application.

Category Enter a recruiting category for the applicant under this career and application. For example, in the previous screen example, this applicant is being recruited according to the geographic region of her school. Define recruiting categories on the Recruiting Category Table page. These same categories are used in both the recruiting and application processes to target and report on students.

If you plan to assign a recruiter to this applicant based on your region tree, you must enter a category of *REGN* (region). Only the recruiters assigned to the region appearing in the Region field will be available.

Group The group under which this category falls automatically displays when you move out of the Category field.

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

Description Enter any descriptive information regarding the recruiting category.

Note. You can enter multiple recruiting categories and supporting information for an application.

Recruiters

This group box becomes available if you have entered a recruiting category. The recruiter assignment is tied to the recruiting categories. Use this section of the page to assign one or more recruiters, relevant to this category, for the applicant.

Recruiters Prompt

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

Clear this check box if you want *only* the recruiters assigned to the current recruiting category to be available when you prompt on the Recruiter ID field. (Note that the *REGN* category works differently).

If you are adding recruiters for the recruiting category *REGN*, you select only from recruiters who were assigned the region that appears in the Region field.

If you entered the region according to the last school attended using the School Postal Code button; the Prompt Table field displays *Recruiters for School's Region*. Select the prompt to bring up any recruiters assigned to that school. If no recruiters are assigned to that school, then your choices are any recruiters assigned to the region.

If you entered the region according to the applicant's home address using the Home Postal Code button, the Prompt Table field displays *Recruiters from Address Region*. Click the prompt to bring up all recruiters assigned to the region.

If you manually chose the region from the region tree, all recruiters assigned a recruiting category of *REGN - Region* are available when you prompt for values on the Recruiter ID field. The Prompt Table display field in this case displays *Recruitment Category*.

Recruiter ID

Enter the ID number of the recruiter that you want to assign to this applicant. The region tree determines which recruiters to make available for selection, based on the region that you assigned to the applicant.

You can override the region tree selection by selecting the Recruiters Prompt check box. If selected, all recruiters for the academic career are available.

You can assign an applicant multiple recruiters for any recruiting category.

Primary

Select this check box if this is the primary recruiter for this category.

The ID of the person who has been marked primary displays in the Prmy Recruiter ID (primary recruiter ID) field. You can use this field to report on primary versus non-primary recruiters.

Events

Click this link to sign an applicant up for attendee events. The Attendee Events page appears.

Go

Click this button to go to another component.

Note. After you save the information on these pages, all modifications must be made on the Application Recruiters page in the Application Maintenance component.

Adding Communications, Checklists and Comments for Applicants

The Communication, Checklist and Comment buttons appear next to the Application Number field on the Application Data, Application School/Recruiting, and Application Recruiters pages, and next to the Expected Graduation Term field on the Application Program Data page.

Use the Communication, Checklist and Comment buttons from this component to open a new window for the entry pages for communication, checklist, and comments and initiate recruiting and admissions related items.

<i>If the Communication, Checklist or Comments Pages are Accessed From the:</i>	<i>The Variable Data for the Following Administrative Function is Supplied:</i>	<i>Data that is Transferred</i>
Application Program Data page	ADMP Admissions Program	ID, academic career, student career number, application number, application program number.
Application Data page	ADMA Admissions Application	ID, academic career, student career number, application center.
Application School/Recruiting page	EVNT Event	ID

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Using the 3C Engine"

Adding New Prospects and Applications with Quick Admit

Recruiting and Admissions can take information concerning people enrolled from the Student Records Quick Admit process and at your discretion, create a prospect record and an application, or an application only for those people.

This section provides an overview of quick enroll and quick admit and discusses how to:

- Enter biographical details.
- Enter regional data.
- Enter or view academic program data.
- Select your criteria for quick admit batch apps.

- Assign criteria for quick admit.

Understanding Quick Enroll and Quick Admit

The Quick Admit a Student component, Quick Enroll and Student component, and Quick Admit Batch Apps component are a variation on the fuller processes of admitting students and enrolling them into classes. Typically, you will use these components in conjunction with each other to accelerate admissions and enrollment procedures where immediate formal processing is not required or is unavailable for students. In addition, collecting admissions information on students who have been quick admitted might be useful for various funnel reports.

The Quick Admit a Student component and Quick Enroll a Student component, when used together, enable you to rapidly add or update a student's personal data in your system; activate the student in an academic career, academic program, or term; and enroll the student in classes.

The Quick Admit a Student component works concurrently with the Quick Admit Batch Apps component. Whenever you admit a student through the Quick Admit a Student component, the system flags the student's record to indicate that the student has been admitted by this method. The system then places these records into a temporary table awaiting your action. Using the Quick Admit Batch Apps component, you can then run the Quick Admit Process (ADQCKADM) to create prospect records and applications for these flagged records in the temporary table. The Quick Admit Batch Apps component and Quick Admit a Student component are not a replacement for the regular Recruiting and Admissions functionality. You must use the Application Data pages for regular admissions.

You can use the Quick Admit a Student component to add a new student's personal data record to your system, to activate a student into an academic career and an academic program within that academic career, and to activate a student into a specific term. By completing and saving the Quick Admit a Student component, a student quickly becomes eligible for class enrollment. You can also use the Quick Admit a Student component to update a new or continuing student's personal data record after the student already has an existing personal data record stored in the system. If you are entering new students into the system through the Quick Admit a Student component and you click the Save button after entering the student's biographical data and program data, the system assigns the student a unique ID that remains associated with the individual in your database until you change or delete it. Remember that each user has access to specific edit modes based on her or his security profile.

Important! To avoid creating duplicate IDs in your system, you should use the search/match function to determine if an individual with the same data already exists in your database before adding the new individual.

For new students, you can use the Quick Admit a Student component to enter the biographic, demographic, address, and program data about the student. When you save the component, the system:

- Assigns the new student an ID and creates a row for the student in the person tables.
- Activates the new student in the academic program that you select within the specific academic institution and academic career that you specify.
- Activates the new student in the term that you select, creating a row in the student term table (STDNT_CAR_TERM) for the student.

For continuing students, you can use the Quick Admit a Student component to activate the student into a subsequent term; or to activate the student into a new academic career. When you save the component, the system:

- Updates the data for the student in the person tables.
- Verifies whether the student has already been activated for the term, and if not, activates the student in the term, creating a new row in the student term table (STDNT_CAR_TERM) for the student.
- Activates the continuing student in the new academic program that you select within the specific academic institution and career that you specify when you are adding the student to a new academic career.

After you have saved the student's biographical data and activated the student into the term, the student is eligible for class enrollment. You can then use the Quick Enroll a Student component to rapidly enroll students into the term. The system carries forward the key information (ID, academic institution, academic career, and term) and automatically opens the Quick Enroll a Student component for the given student.

When you access the Quick Admit a Student component, a dialog box prompts you to enter the key values of the admissions transaction. The key values are:

ID	In add mode, the system defaults the student's ID to <i>New</i>. For a student new to your system, you can use the default value to have the system assign the ID, or you can enter a new ID of your choice provided that it does not belong to another individual already in the system, or you can enter a student's existing ID. In other modes, the system prompts you to search for an existing ID. If you enter a new ID of your choice, you run the risk of disrupting the auto-numbering sequence that is included with the system. If you disrupt the auto-numbering sequence, a system administrator must correct the situation.
Academic Institution	Enter the academic institution to which you want to quickly admit the student.
Academic Career	Enter the academic career to which you want to quickly admit the student. Remember that academic careers are parents of academic programs. Therefore, when you enter an academic program on the Program/Plan page within this component, the system displays academic programs based only on the academic career you enter here.

Term

Enter the term for which you want to activate the student. After you enter the required data for a student into the Quick Admit a Student component and click the Save button, the system activates the student into the term that you specify. This functionality works for both new and continuing students.

To use the Quick Admit feature for a specific term, you must already have defined your academic term calendar for the academic programs within that term.

Note. Quick Admit uses the Max Program Effective Date for Term field from the Term/Session Table when populating the Effective Date on Student Program/Plan. If the current date is less than or equal to the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to current date. If the current date is greater than the Max Program Effective Date for the activation term, the Effective Date field on Student Program/Plan will be set to the Max Program Effective Date defined for activation term.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Establishing Terms and Sessions."

Add

Click to open the component with the specified key values.

The Quick Admit Batch Apps process is a two-step, two-page process. Use the first page in the Quick Admit Batch Apps component, the Selection Criteria page, to select a group of students who have been admitted through the Quick Admit a Student component. Use the second page in the Quick Admit Batch Apps component, the Assignment Criteria page, to specify whether to create historical prospect and application records or new prospect and application records, or both.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "Processing Class Enrollment Transactions"

Pages Used to Add New Prospects/Applications with Quick Admit

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Quick Admit - Biographical Details	SCC_BIO_DEMO_PERS	Records and Enrollment, Enroll Students, Quick Admit a Student	Enter or update a student's biographic and demographic information.
Quick Admit - Regional	SCC_BIO_DEMO_REG	Records and Enrollment, Enroll Students, Quick Admit a Student, Regional	Enter or update a student's information according to regional data requirements.

Page Name	Definition Name	Navigation	Usage
Quick Admit - Program/Plan	PROGRAM_PLAN	Records and Enrollment, Enroll Students, Quick Admit a Student, Program/Plan	For new students, select the primary academic program for which you want to activate the student in a term and enter other program stack information. For continuing students, view the student's career number and primary academic program or add the student to a new academic career. If you want make any changes to a new or continuing student's program stack information after you save the student to your system, you must use the Student Program/Plan component.
Quick Admit - Selection Criteria	QUICK_ADMIT_SELECT	Records and Enrollment, Enroll Students, Quick Admit Batch Apps	Enroll students into classes without going through a formal admissions process.
Quick Admit - Assignment Criteria	QUICK_ADMIT_CREATE	Records and Enrollment, Enroll Students, Quick Admit Batch Apps, Assignment Criteria	Create applications for the group of quick-admitted students that you selected in the first page of this component.

Entering Biographical Details

Access the Quick Admit - Biographical Details page.

This page is part of the Quick Admit a Person feature, which enables you to rapidly admit students into your institution. The system saves any biographic and demographic data that you add or change to the person tables. You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

See [Chapter 17, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 215.](#)

Entering Regional Data

Access the Quick Admit - Regional page.

This page is part of the Quick Admit a Student feature, which enables you to rapidly admit students into your institution. The system saves the regional data that you add or change to the person tables. You can maintain a student's biographical data through either the Quick Admit component or the Add/Update a Person component found in PeopleSoft Campus Community.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information"

Entering or Viewing Academic Program Data

Access the Quick Admit - Program/Plan page.

Biographical DetailsRegionalProgram/Plan

NEW

Career:UGRDUndergradInstitution:PSAUSPSAUSTerm:06212009 Sem1

Program and Plan

Academic Program Primary:

BART

BART

Campus:

MAIN

Main Campus

Academic Plan:

PSYCHOLOGY

Psychology

Admit Term:

0621

2009 Semester 1

Requirement Term:

0621

2009 Semester 1

Expected Graduation Term:

'Mode of Attendance:

Internal Mode of Attendance

Cohort:

0900

2009 Commencing

Funding Source:

CSP

Commonwealth Supported Place

Residency

Quick Admit - Program/Plan page

Note. Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Entering Program Stack Data for New Students

When you add a new student to your system, the following fields appear:

Academic Program Primary (academic program primary)	Enter the primary academic program into which you want to matriculate and activate the student. The system prompts you with academic career values specific to the academic career that you selected as a key upon entering the component.

Campus	Enter the campus where the student is going to take the primary academic program.
Academic Plan	Enter the student's primary academic plan within the primary academic program. If a student requests multiple academic plans within the academic program, you must enter the additional academic plans through the Student Program/Plan component.
Admit Term	The term in which you are matriculating the student into the academic program. The admit term usually defaults from the Recruiting and Admissions matriculation process. However, because you are performing a quick activation and are going to matriculate the student through this Quick Admit a Student component, you must enter the admit term for the primary academic program that you have specified.
Requirement Term	The requirement term indicates to the system which term's degree progress requirements apply to the student for the primary academic program that you have specified. The system, by default, sets this value to the Admit Term value.
Expected Graduation Term	Enter the term in which you expect the student to graduate. Define term values on the Term Table page.
(NZL) Funding Source	This field is used by New Zealand institutions.
(AUS) Mode of Attendance	The Mode of Attendance field is a required field that is populated on each student's application. This data is required for reporting admissions data to the TACs via the Enrollment Feedback process as well as reporting element 329 Mode of Attendance code in DEEWR Data Collections. The Mode of Attendance field resides on Application Entry, Application Maintenance, and Program Addition pages. It is a required field when you enter an application. After the student is matriculated, the mode of attendance is carried forward to the student program.
(AUS) Cohort	(Optional) Select a cohort for the student that the system will use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected. After the student is matriculated, the cohort is carried forward to the student program.
(AUS) Funding Source	(Optional) Select a funding source for the applicant to represent the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DEEWR Applications & Offers Collection. See <i>PeopleSoft Student Records 9.0 PeopleBook</i>, "(AUS) Generating Government Reports," Generating the Applications and Offers Files.
Residency	Click to display the Residency Official page and record residency information that has been verified by your institution.

Quick Enrollment	Click to access the Quick Enroll component, where you can process enrollment transactions for the student.
Enrollment Appointments	Click to access the Appointments component, where you can add and update enrollment appointments for the student.
Student Program Plan	Click to access the Student Program/Plan component and make any changes to a new or continuing student's program stack information after the student data has been saved to your system.

Viewing Program Stack Data After Saving the Component

When you are updating a new or continuing student's records, only the following fields appear:

Student Career Nbr (student career number)	The system uses the student career number to differentiate between academic programs within the same academic career. For students with multiple academic programs within the same academic career, you must enter the student career number for which you want to activate the student into the term you have specified. If the student has only one student career number in a specific academic career, the field is unavailable for edit.
Prim Prog (primary program)	The system displays the primary academic program associated with the student career number. The primary academic program that appears is the academic program into which the system activates the student for the term that you have specified.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information"

Chapter 17, "Adding and Updating Applications," Understanding Quick Enroll and Quick Admit, page 236

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Personal Identification Data," Entering Residency Data

Selecting Your Criteria for Quick Admit Batch Apps

Access the Quick Admit - Selection Criteria page.

Selection Criteria		Assignment Criteria	
Run Control ID: 1		Report Manager Process Monitor Run	
		Find View All First 1 of 1 Last	
*Academic Institution:	PSUNV	PeopleSoft University	+ -
Academic Career:	UGRD	Undergraduate	
Academic Program:	LAU	Liberal Arts Undergraduate	
		Find View All First 1 of 1 Last	
Academic Plan:	ART-MINOR	Art Minor	+ -

Quick Admit - Selection Criteria page

Academic Institution	Enter the academic institution from which you want to select quick-admitted students. You can enter multiple academic institutions. You must enter at least one academic institution.
Academic Career	Enter the academic career from which you want to select quick-admitted students. You can enter multiple academic careers.
Academic Program	Enter the academic program from which you want to select quick-admitted students. You can enter multiple academic programs.
Academic Plan	Enter the academic plan from which you want to select quick-admitted students. You can enter multiple academic plans.

Assigning Criteria for Quick Admit

Access the Quick Admit - Assignment Criteria page.

Selection Criteria		Assignment Criteria	
Run Control ID: PS		Report Manager Process Monitor Run	
Processing Options			
☒ Create Applicant / Prospect ☐ Delete from Holding Table			
Create Records from Quick Enrl			
☒ Create History ☒ Create New ☒ Create Application ☒ Create Prospect			
Create History Values			
'Acad Level:		'Admit Type:	
'Appl Ctr:		'Acad Load:	
'Appl Meth:		'Rcrtg Stat:	Applicant
'Recr Ctr:		'Refrl Srce:	APPL
Copy History Values to New			

Quick Admit - Assignment Criteria page (1 of 2)

Create New Assignment Values					
'Institution:	PSUNV	PSU	'Career:	UGRD	Undergrad
'Admit Term:	0390	2000 Sprng	'Admit Type:	FYR	First-Year
'Acad Prog:	LAU	Lib Arts	'Prog Actn:	ADMT	Admit
'Action Rsn:	AUTO	Auto Assign	'Acad Level:	1st Year	
'Appl Ctr:			'Acad Load:		
'Appl Meth:			'Rcrtg Stat:	Applicant	
'Recr Ctr:			'Refrl Srce:	APPL	Applicatn
Find View All First ◀ 1 of 1 ▶ Last					
'Academic Plan:	SOC	Sociology	+ -		

Quick Admit - Assignment Criteria page (2 of 2)

Create Applicant/Prospect Select this option to create prospect and application records for the selected group of students.

Delete From Holding Table	Select this option to take the selected group of students and delete them from the temporary table. Selecting this option will disable the remaining fields on the page. If this is the desired option, click the Run button to initiate this process. If you use the Quick Admit a Student feature but do not create applications for quick admitted students, you should run this process to clean out the temporary table.
Create History	Select this check box to create history records for the group of students you have selected. The system adds the students to the prospect and applicant tables even though they bypassed the normal admissions process. The data created is based on the data entered on the Quick Admit pages. Selecting this check box ensures that admissions information is available for these people for your admissions reporting purposes.
Create New	Select this check box to create a new set of prospect and application records for the selected group of students. Prospect and application records will be created based on the parameters in the Assignment Values group box.
Create Application	Select this check box to create applications for the selected group of students. This field is available if you select the Create New check box.
Create Prospect	Select this check box to create prospect records for the selected group of students specified on the Selection Criteria page. If the Create Application check box is selected, the availability of this field is determined by the settings on the Installation Defaults - AD page.

The following fields appear, regardless of whether you choose Create History or Create New:

Acad Level (academic level)	Select the academic level that you want to assign to the selected group.
Admit Type	Enter the admit type that you want to assign to selected group.
Appl Ctr (application center)	Enter the application center that is populated for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.
Acad Load (academic load)	Select the academic load that the applicants will carry. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Full-Time</i> and <i>Part-Time</i> .
Appl Meth (application method)	Select a value to indicate how or in what form the application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>(none)</i> , <i>Application Service</i> , <i>Diskette</i> , <i>Hard Copy</i> , <i>Web Application</i> , <i>EDI</i> , and <i>OUAC</i> .

Rcrtg Stat (recruiting status)	Select the recruiting status that will be populated on the prospect record of this applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Applicant,Inactive,Inquiry,Pre-Appl,Prospect,and Suspect</i>. This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i>.
Recr Ctr (recruiting center)	Enter the recruiting center that is responsible for this particular program on the prospect record. Define recruiting centers on the Recruiting Center Table page. This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i>.
Refrl Srce (referral source)	Enter the appropriate referral source that will be populated on the prospect record. A referral source indicates how this person became a prospect. In other words, it is a high-level indicator of how your institution came into contact with the person. For example, a referral source could be <i>Drop-In, Campus Event, or College Fair</i>. Define referral sources on the Referral Source Table page. This field appears only if the Create Prospects field on the Installation – AD page is set to <i>Yes</i>.
Copy History Values to New	Click to transfer values entered for Create History to the corresponding fields in the Create New section. This minimizes data entry.

The following fields are associated solely with the Create New option:

Institution	Enter the academic institution that you want to assign to the selected group.
Career	Enter the academic career that you want to assign to the selected group.
Academic Plan	Enter the academic plan that you want to assign to the selected group of students.
Acad Prog (academic program)	Enter the academic program that you want to assign to the selected group.
Prog Actn (program action)	Enter the program action that you want to assign to the selected group.
Action Rsn (action reason)	Enter the action reason that you want to assign to the selected group.
Admit Term	Enter the admit term that you want to assign to the selected group.
Academic Plan	Enter the academic plan that you want to assign to the selected group of students.

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

Student records that were processed are automatically deleted from the temporary record, so it is not necessary to run the Delete from Holding Table process.

Creating Applications from External Test Score Data

If application data is included in your LAW, AMCAS, or ADA external test score loads, you can load the data as new applications. The data used to create new applications comes from the Additional Candidate Information data posted to the following pages:

Test	Page Where Data Comes From
LAW	Personal Information
AMCAS	Application
ADA	Application

After the external application data is posted to your database, you are ready to run the Create Applicants from Tests process.

Note. Applications are created for all records posted to the Additional Candidate Application Information pages listed in the previous table if the Post option contains the *Select for Application Creation* value. After the Create Applicants from Tests process runs, the process updates the Post option to *Created Application* if the process created an application for the person, or *Duplicate Application* if a potential duplicate was found and the program did not create an application.

You must set up some initial parameters before activating the process.

To run the Create Applicants from Tests process:

1. Select the test score load data.
2. Set up the application program parameters.
3. Set up the application data parameters.
4. Set up the application recruiting data parameters and run the Create Applicants from Tests process.

See Also

[Chapter 20, "Processing External Test Scores," page 347](#)

Pages Used to Create Applications from External Test Score Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Applicants From Tests	ADM_APPL_PROC_PARM	Student Admissions, External Test Score Processing, Create Applicants from Tests	Indicate which type of application you want to load.
Application Program Parms (application program parameters)	ADM_PROG_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Program Parms	Set up default program parameters for the new applications. The values you select for the fields on this page are inserted on the Application Program Data page when the new applications are loaded.
Application Data Parms (application data parameters)	ADM_APPL_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Data Parms	Set up default application data parameters to be filed in on new applications. The values you select for the fields on this page are inserted on the Application Data page when the new applications are loaded.
Application Recruit Parms (application recruit parameters)	ADM_RECRUIT_PARMS	Student Admissions, External Test Score Processing, Create Applicants from Tests, Application Recruit Parms	Set up default application recruiting parameters to be filled in on new applications. The values you select for the fields on this page are inserted on the Application School/Recruiting page when you load the new applications.

Selecting the Test Score Data Load

Access the Create Applicants From Tests page.

Create Applicants From Tests	Application Program Params	Application Data Params	Application Recruit Params
Run Control ID: 1			
Report Manager Process Monitor Run			
Create Applications From			
☒ LAW Test Score Data ☐ MCAT Test Score Data ☐ ADA Test Score Data			

Create Applicants From Tests page

Select the type of external test data from which you want to create applications: *LAW Test Score Data*, *MCAT Test Score Data*, or *ADA Test Score Data*.

Setting Up the Application Program Parameters

Access the Application Program Params (application program parameters) page.

Create Applicants From Tests	Application Program Params	Application Data Params	Application Recruit Params
Run Control ID: 1			
Report Manager Process Monitor Run			
Program Data			
*Institution:	PSUNV	PeopleSoft University	*Career:
			UGRD
			Undergrad
*Admit Term:	0550	2005 Fall	*Acad Load:
			Full-Time
*Acad Prog:	LAU	Lib Arts	*Campus:
			MAIN
			Main
Program Status			
*Status:	Applicant	*Prog Actn:	APPL
			Application
Action Reason:			
Plan Data			
Acad Plan:	ENGL-BA	English (BA)	
Sub-Plan Data			
Sub-Plan:			

Application Program Params page

Note. Some of the fields on this page might populate automatically according to your user defaults. You can edit those fields as needed.

Admit Term

Enter the admit term for these applicants. Define admit terms on the Term Values Table page.

Acad Load (academic load)	Select the academic load for these applicants. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Program (academic program)	Enter the academic program for these applicants. Only the academic programs for the chosen career appear in the prompt list. Define academic programs on the Academic Program Table page.
Campus	Enter the campus being applied to within your institution. Define campuses on the Campus Table page.
Status	Select the person's program status. This value is entered on the application. Values for this field are delivered with your system as translate values. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Prog Actn (program action)	Enter the program action that you want entered regarding the program on these applications. Because the intent of this process is to create applications, not all program actions are available when you prompt on this field. Program actions are stored on the Program Action Table page.
Action Reason	If there are action reasons associated with the program action that you selected, you can enter the appropriate reason value. Define action reasons on the Action Reason Table page.
Acad Plan (academic plan)	Enter an academic plan for these applications. Define academic plans on the Academic Plan Table page.
Sub-Plan	Enter a subplan for these applications. Define academic subplans on the Academic Sub-Plan Table page.

Setting Up the Application Data Parameters

Access the Application Data Parm (application data parameters) page.

Create Applicants From Tests Application Program Params Application Data Params Application Recruit Params
Run Control ID: 1 Report Manager Process Monitor Run Application Data *Application Center: UGR1 Undergrad Additional Information Housing Interest: On Campus ☒ Financial Aid Interest Application Fee Information Fee Type: Standard File Information ☐ Complete Admit Type: FYR First-Year Academic Level: 1st Year *Notification Plan: Regular Application Method: Hard Copy

Application Data Params page

Note. Some of the fields on this page appear automatically according to your user defaults. Edit these fields as needed.

Application Center	Enter the application center for these applications. The only values available are those that fall under the academic career entered on the Application Program Parameters page.
Housing Interest	Select a housing interest, if applicable. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Commuter</i> , <i>Off Campus</i> , and <i>On Campus</i> .
Financial Aid Interest	Select this check box if you want the system to select the corresponding check box on the newly created applications. This field is useful for informational and reporting purposes. For example, your financial aid office can run reports listing those applicants interested in financial aid.
Fee Type	Select the fee type you want entered for these applications. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Internatnl</i> (international) and <i>Standard</i> .
Complete	Select this check box to mark these applications complete.
Admit Type	Enter the admit type that you want entered for these applications. Define admit types on the Admit Type Table page.
Academic Level	Select the academic level you want entered for these applications. Values for this field are delivered with your system as translate values. You can modify these translate values.

Notification Plan

Select the notification plan that you want entered for these applications. A notification plan specifies whether this person should be on a regular or special notification track. This field is useful for informational reporting purposes. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Early Admt* (early admit), *Regular*, and *Rolling*.

Application Method

Select the application method that you want entered for these applications. Application methods indicate how or in what form you received these applications. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are (none), Application Service, Diskette, Hard Copy, Web Application, EDI, and OUAC.

Setting Up the Application Recruiting Parameters

Access the Application Recruit Parms (application recruit parameters) page.

Create Applicants From Tests	Application Program Parms	Application Data Parms	Application Recruit Parms
Run Control ID: 1 Report Manager Process Monitor Run			
Recruiting Information			
Region from: Region Region: CCOAST CA Central Coast			
*Recruiting Center: UGRD Undergrad			
Recruiting Category			
Category: HGPA High GPA			
Sub-Cat: High			
Recruiter ID: AA0012 Sandra Kim ☒ Primary Recruiter			

Application Recruit Parms page

Region from	Select how you would like the region to be assigned to these applications. Values are <i>School</i>, <i>Address</i>, and <i>Region</i>. <i>School</i>: Not a valid choice. You will get an error message if you enter this value. <i>Address</i>: Select this value if you want the system to automatically assign a region to these applications according to the applicant's home address. If you select <i>Address</i>, the Region field is not available because the system will assign the region based on the person's home address or the address of the last school attended. <i>Region</i>: Select this value if you prefer to choose a region here to be entered on all applications. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Region	Enter a region to be entered on these applications. This field is available only when you enter <i>Region</i> in the Region from field. It is automatically assigned when <i>Address</i> is entered. Define regions on the Region Tree page.
Recruiting Center	If you have indicated in your installation setup that you want prospect records to be created for applications that come in without existing matching prospect records, you must enter a recruiting center here to be added to the new prospect record. Define recruiting centers on the Recruiting Center Table page.
Category	Enter a recruiting category If you want a recruiting category entered on these applications. The recruiting categories available are based on the academic career that you selected.
Sub-Category	Select a recruiting subcategory for these applications (optional). Subcategories indicate your level of interest in the applicant. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>High</i>, <i>Low</i>, and <i>Medium</i>.
Recruiter ID	If you have entered a recruiting category and you want a recruiter assigned to these applications under the chosen category, enter the recruiter identification number in this field. Only recruiters assigned to this academic career are available.
Primary Recruiter	Select this check box if you want the recruiter that you selected to be the primary recruiter for these applications.

Click the Run button to run the Create Applicants from Tests process at user-defined intervals.

When this process runs, the system looks to the defaults you have set up on the Installation Defaults - AD page and creates a prospect record based on the Create Prospect setting.

Note. To view the applications posted for a person, use the Maintain Applications component, or for a summary of the applications, see the Application Summary page.

See Also

Chapter 3, "Setting Up Prospects," Setting Up Admission Installation Defaults, page 25

Updating Applications

After you have entered and saved an application, you must use the Application Maintenance component to update the application. Use the Application Maintenance component to program, recruiting data and more. You can also use this component to calculate an application fee, calculate an enrollment deposit, and matriculate an applicant.

Data in this component is stored at the *application* level, as opposed to the applicant or program level. This data is relevant to all academic programs being applied to with this application. You can enter and edit information in this component.

This section lists prerequisites and discusses how to:

- Update or add application program data.
- Capture student response – why the student selected another institution.
- Add a program to an existing application.

Prerequisites

Before you can edit or add any additional information in the Application Maintenance component, an application must first be entered into the system through the Application Entry component.

The Process Applications, Application Maintenance component is the third of three very similar components:

- Student Recruiting, Add/Update a Prospect component.
- Student Admissions, Add Application component.
- Student Admissions, Maintain Applications component.

For example, Add/Update a Prospect and Add Application have a Bio/Demo (biographic/demographic) page and a Regional page. All three components have pages with similar names such as Prospect Academic Program Data page and Application Program Data page. You use these components to enter or maintain similar information at different times in your business process: for prospects, for entering application data, and for maintaining application data (discussed in this chapter).

Pages Used to Update Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Program Data	ADM_APPL_PROG_MNT	Student Admissions, Application Maintenance, Maintain Applications	Edit or update program and plan data for an application. You can also create an enrollment deposit and matriculate an applicant from this page. <i>All</i> applications must be tied to an academic career and program. Any lower level tracking depends on your office's policies.
Application Data	ADM_APPL_DATA	Student Admissions, Application Maintenance, Maintain Applications, Application Data	Update information for an application.
Application School/Recruiting	ADM_APPL_RECRUIT	Student Admissions, Application Maintenance, Maintain Applications, Application School/Recruiting	Update or add recruiting information data. <u>See Chapter 17, "Adding and Updating Applications," Entering Recruiting Information for an Application, page 231.</u>
Application Student Response	ADM_APPL_STDNT_RSP	Student Admissions, Application Maintenance, Maintain Applications, Application Student Response	Capture the reason why a prospect or applicant chose to attend another institution and what institution he or she will be attending.
Program Addition	ADM_APPL_ADD_PROG	Student Admissions, Application Maintenance, Program Addition	Add a program to an existing application if you have already created an application number for that person within the same career. This page is only for <i>adding</i> an academic program and program-related information. You perform all <i>modifications</i> to existing academic programs using the Application Program Data page in the Maintain Applications component.

Updating or Adding Application Program Data

Access the Application Program Data page.

Note. Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Sequence

The default of the sequence is 1. The sequence appears in the field to the right of the Effective Date field.

When you enter more than one row for the same effective date, the system automatically increments the sequence.

Program Action

If you are adding a new row, the Program Action field is blank, because the system is assuming you want to update the status of this application. Edit or add the appropriate program action value. Program actions are stored on the Admissions Action Table page and will display based on your Admissions Action security.

See Also

[Chapter 17, "Adding and Updating Applications," Entering Application Program Data, page 216](#)

Capturing Student Response – Why the Student Selected Another Institution

Access the Application Student Response page.

Application Data Application School/Recruiting **Application Student Response**

Al Smith 0021

Academic Institution: PeopleSoft University

Academic Career: Undergraduate **Application Number:** 00024144

Student Response Find | View All First 1 of 1 Last

*Reason: FAID No Financial Aid *Date: 09/15/2004

External Org ID: 000000001 Description: Cottonwood High School

Transfer To: Education Go

Application Student Response page

Student response information is important information your institution might want to track and report on. You can choose from a series of adapted reason response codes that your institution can set up to capture the exact information you want to track. However, you can use this page however you want to. For example, you can capture why students chose *not* to attend your school and where they are going. Alternatively, you can capture the reason why a student *did* select your school. If a student has multiple applications on file, each application can have its own corresponding student response. You can enter multiple reasons per application.

Reason	Enter a Student Response Reason code, for example <i>FAID</i> (financial aid). Define reason codes on the Response Reason Table page.
External Org ID (external organization ID)	Enter the external organization ID of the institution that the student has decided to attend. The system displays the external organizations for which you selected the Student Response - School Type check box. You can enter a free-form institution name by tabbing out of the External Org ID field without entering a value and entering an institution in the field to the right. This way, the institution does not have to enter in all possible external institution codes. To enter a free form institution, you must select the Free Form Institution check box on the Installation - AD page.
Date	The date the response reason was entered. The default date is your system date.

See [Chapter 10, "Setting Up for Evaluating Applicants," Setting Up Student Response, page 110.](#)

Adding a Program to an Existing Application

Access the Program Addition page.

Program Addition			
Damien Crowther		ADAUS005	
Academic Career: Undergraduate		Application Nbr: 00024433	
Program Data			
Program Number:	1	Effective Date:	08/12/2009
*Academic Institution:	PSAUS	*Admit Term:	0641 2010 Sem1
*Academic Program:	BCOM	Expected Graduation Term:	
*Campus:	MAIN	*Academic Load:	Full-Time
☐ Joint Program			
*Mode of Attendance:	Internal Mode of Attendance		
Cohort:			
Funding Source:	CSP Commonwealth Supported Place		
Program Status			
Status:	Applicant	Action Date:	08/12/2009
*Program Action:	APPL Application	Action Reason:	
Career Number:	0	Evaluation	
Plan Data			
*Academic Plan:	BUSSYSTEMS Business Systems	Major	
Sub-Plan Data			
*Sub-Plan:			

Program Addition page

This component allows you to enter another program for an existing application. You may choose this option instead of creating a whole new application. The Program Number will increment by one based on the previous Program Number used for the application. For example, the student has one application on file with Program Number 0 for Liberal Arts and Program Number 1 for Fine Arts. Upon adding a new program from this component, the Program Number will increment to 2. After you have added the additional program, you maintain it through the Application Program Data page in the Maintain Applications component. You are prompted to choose the appropriate program number on the search page before accessing the Application Program Data page. To edit a different academic program for that application, you would need to click the Return to the Search button and choose the correct program number.

Note. Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

For documentation about the fields on the Program Addition page:

See Also

Chapter 17, "Adding and Updating Applications," Entering Application Program Data, page 216

Viewing Application Summary Information

This section discusses how to view application summary information.

Pages Used to View Application Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Summary	ADM_APPL_SUMM	Student Admissions, Applicant Summaries, Application Summary	View summary information about any application stored for an applicant.
Application Detail	ADM_APPL_SEC	Click the Application Detail link on the Application Summary page.	View application detail information.

Calculating Application Fees in Batch

This section discusses how to calculate application fees in batch.

Pages Used to Calculate Application Fees in Batch

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Application Fees	RUNCTL_SFPBAAPP	Student Admissions, Application Fees and Deposits, Application Fees Process	Calculate application fees for a group of applicants. The Batch Application Fees process updates each applicant's application fee status on the Application Data page to <i>Completed</i> . The process also updates each applicant's customer account in PeopleSoft Student Financials if appropriate.
Application Fees (Batch)	APP_FEE_CALC	Student Admissions, Application Fees and Deposits, Review Batch Application Fees	View application fee information generated by the Batch Application Fees process. You must first run the Batch Application Fees process via the Batch Application Fees page.

Page Name	Definition Name	Navigation	Usage
Application Fee Calc Messages	APP_CALC_MESSAGES	Student Admissions, Application Fees and Deposits, Application Fee Calc Messages	View messages generated by the batch application fees process.

Calculating Application Fees in Batch

Access the Batch Application Fees page.

Batch Application Fees

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Parameters

Batch ID: 999999999999

*Academic Institution: PSUNV PeopleSoft University

Application Center: UGRD Undergraduate

Admit Term: 0670 2011 Fall

[Display Application Fees](#)

Batch Application Fees page

Batch ID	The Batch Application Fees process assigns a batch ID after you initiate the process.
Academic Institution, Application Center, and Admit Term	Enter an academic institution, application center, and admit term. The Batch Application Fees process calculates application fees for the applicants that the process selects using this criteria.
Display Application Fees	Click this link to view the application fees for each applicant after you have run the Batch Application Fees process. The Application Fees (Batch) page appears.

Click the Run button to run the Batch Application Fees process at user-defined intervals.

Note. If you use AAWS and Yes is the option selected for the Application Fee Required field in the AAWS Application Fee and Waiver Processing group box on the Application Center Table page, then when you click Run, an error message appears: *Application fees for this Application Center can be calculated through Admissions Web Services only.*

See [Chapter 2, "Building Your Recruiting Structure," Setting Up Application Processing Centers, page 14.](#)

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, Managing PeopleSoft Admission Transactions, Reviewing and Editing Staged Admission Application Transactions

Recording the Basis of Admission

To set up a basis of admission, use the Basis of Admission component (BASIS_ADMIT_TABLE).

This section discusses how to:

- Define the basis of admission code.
- Assign the basis of admission codes to applicants.

You can set up basis of admission codes that represent general admission criteria—such as ACT test score, grade point average, or interview—then link the code or codes to applicants or students. You can also print the basis of admission on admission offer letters and transcripts.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft RECORD.FIELD
BasisAdmit	ADM_BASIS_ADMIT.BASIS_ADMIT_CODE
BasisAdmitDL	ADM_BASIS_ADMIT.DESCR254
BasisAdmitDE	BASIS_ADMIT_TBL.DESCR
BasisAdmitDS	BASIS_ADMIT_TBL.DESCRSHORT
BasisAdmitAcadProg	ADM_BASIS_ADMIT.ACAD_PROG
BasisAdmitTerm	ADM_BASIS_ADMIT.ADMIT_TERM
BasisAdmitBeginDt	ADM_BASIS_ADMIT.BEGIN_DT
BasisAdmitEndDt	ADM_BASIS_ADMIT.END_DT

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Communications"

Pages Used to Record the Basis of Admission

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Basis of Admission Setup	BASIS_ADMIT_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Basis of Admission Table	Define basis of admission codes. You link these codes to applicants and students on the Basis of Admission page.
Basis of Admission	ADM_APPL_BASIS_ADM	Records and Enrollment, Career and Program Information, Basis of Admission	Assign the basis of admission to an applicant or student.

Defining the Basis of Admission Code

Access the Basis of Admission Setup page.

Include In Offer Select this check box to include the code, description, short description, and long description by default on the admission offer letter for any applicant to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Offer check box on the Basis of Admission page.

Include In Transcript Select this check box to include the code and long description by default on the transcript for any student to whom you assign this basis of admission code. When you select this check box, the system automatically selects the Include in Transcript check box on the Basis of Admission page.

Long Description Enter a default long description for this basis of admission code. The long description appears by default on the Basis of Admission page after you assign this code to the applicant or student.

The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum score required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on their SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.

Assigning a Basis of Admission to Applicants

Access the Basis of Admission page.

Basis of Admission	
John Smith	AD5024
Academic Institution:	PSUNV
Academic Career:	Undergraduate
Student Career Nbr:	0
Find View All First 1 of 1 Last	
*Basis of Admission:	GBAP Grade Point Average Basis
Application Nbr:	00022768
Application Program Nbr:	0
*Admit Term:	
Academic Program:	LAU
Begin Date:	10/25/2004 ☐ Include in Offer
End Date:	☐ Include in Transcript
Long Description:	Applicant's grade point average met minimum requirements for admission.
Transfer To:	Application Maintenance Go

Basis of Admission page

Basis of Admission	Enter a basis of admission code from the list of valid values. Define basis of admission codes on the Basis of Admission page.
Application Nbr (application number)	Enter an application number to assign the basis of admission to a specific application. (optional)
Application Program Nbr (application program number)	Enter an application program number to assign the basis of admission to a specific program. (optional)
Admit Term	Enter the individual's admit term. If an individual was admitted to more than one academic program, he or she could have multiple admit terms.
Academic Program	Enter the individual's academic program to which you want to apply the basis of admission. Individuals can be admitted to multiple academic programs. (optional)
Begin Date	The default for the begin date is your system date.
End Date	Enter the date that you want this basis admission to be no longer valid. If you run the offer letter or transcript after this date it will not appear even if you have selected the Include in Offer check box.

Include in Offer	Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this applicant here.
Include In Transcript	Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Basis of Admission setup page is selected for the given basis of admission. You can change the setting for this person here.
Long Description	The long description appears from the Basis of Admission setup page. You can change the long description for this person here. The long description should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. Thus, if you admitted a person based on his or her SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person.
Go	Click this button to go to another component.

Recording Comments and Conditions for Admission

To set up admission comment codes, use the Admissions Comments component (ADMISSION_COMMENTS).

This section discusses how to:

- Define admissions comment codes.
- Assign admission comment codes to applicants.

Recruiting and Admissions functionality enables you to record generic comments and then link them to an applicant. You can use this functionality however you like. One particular use is to record conditions of admission. For example, you can define a comment such as "You must successfully complete all current coursework." You can set up admission comment codes that represent general admission comments, then link the code or codes to the applicant. You can print the comments on the admission offer letter, and later, after the applicant becomes a student, you can print the comment on his or her transcript.

Available Fields for Letter Generation

The following fields are attached to the ADMA and ADMP administrative functions and are available as merge fields for all letters. The system extracts and attaches up to three bases of admissions.

Winword Merge Field	PeopleSoft <i>RECORD.FIELD</i>
AdmCommentCd	ADM_COMMENTS.ADM_COMMENT_CD
AdmCommentDL	ADM_COMMENTS.DESCRLONG
AdmCommentDE	COMMENT_CDE_TBL.DESCR
AdmCommentDS	COMMENT_CDE_TBL.DESCRSHORT
AdmCommentTerm	ADM_COMMENTS.ADMIT_TERM
AdmCommentProg	ADM_COMMENTS.ACAD_PROG
AdmCommentBegin	ADM_COMMENTS.BEGIN_DT
AdmCommentEnd	ADM_COMMENTS.END_DT
AdmCommentType	ADM_COMMENTS.COMMENT_TYPE

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Communications"

Pages Used to Record Comments and Conditions for Admission

Page Name	Definition Name	Navigation	Usage
Admissions Comments Table	ADM_COMMENTS_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Application Evaluation, Admissions Comments Table	Define admission comment codes.
Admissions Comments	STDNT_ADM_COMMENTS	Student Admissions, Application Evaluations, Application Decisions, Admission Comments	Assign admission comments to applicants.

Defining Admission Comment Codes

Access the Admissions Comments Table page.

Admissions Comments Table

Academic Institution: PSUNV PeopleSoft University

Admission Comment Code: S122

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

Comment Type: ☒ Conditional ☐ Procedural

*Description: Scholarship-Trustees

Short Description: Scholarshi ☒ Include in Offer ☐ Include In Transcript

Long Description: Because of your outstanding high school record and achievements, you have been awarded an annual \$15,000.00 Trustees Honors Scholarship.

Admissions Comments Table page

Comment Type

Indicates the type of comment that you are entering. Select *Conditional* if the comment is a condition for admission, and *Procedural* if the comment is for procedure only. (informational only)

Include In Offer

Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. When you select this check box, the system automatically selects the Include in Offer check box on the Admission Comments page.

Include In Transcript

Select this check box to include the code and long description on the student's transcript. When you select this check box, the system automatically selects the Include in Transcript check box on the Admission Comments page.

Long Description

Enter the full text of the comment for this admission comment code. The long description appears by default on the Admission Comment page after you assign this code to the applicant.

Assigning Admission Comments to Applicants

Access the Admission Comments page.

Admission Comments			
Al Smith		0021	
Academic Career: Undergraduate		Student Career Nbr: 0	Institution: PSUNV
Find View All First 1 of 1 Last			
*Admission Comment Code:	S122	Scholarship-Trustees	Comment Type ☒ Conditional ☐ Procedural
*Admit Term:		Academic Program:	
Begin Date:	09/15/2004	☒ Include in Offer	
End Date:		☐ Include in Transcript	
Description:	Because of your outstanding high school record and achievements, you have been awarded an annual \$15,000.00 Trustees Honors Scholarship.		
Transfer To:	Application Maintenance	Go	

Admission Comments page

Admission Comment Code	Enter a code. Define comment codes on the Admission Comment Table page.
Admit Term	Enter an admit term. If an applicant was admitted to more than one academic program, he or she can have multiple admit terms.
Academic Program	Enter an academic program. Applicants can be admitted to multiple academic programs. (optional)
Comment Type	Indicates the type of comment that you are entering. Select <i>Conditional</i> if the comment is a condition for admission, and <i>Procedural</i> if the comment is for procedure only. (informational only)
Begin Date	The default for the begin date is your system date.
End Date	Enter the date from which you want this comment to be no longer valid. If you run the offer letter after this date it will not appear even if you have selected the Include in Offer check box.
Include in Offer	Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. The system automatically selects this check box if the Include in Offer field on the Admission Comment Table page is selected. You can change the setting for this applicant here.

Include In Transcript	Select this check box to include the code and long description on the student's transcript. The system automatically selects this check box if the Include in Transcript field on the Admission Comment Table page is selected. You can change the setting for this applicant here.
Long Description	The long description appears from the Admission Comment Table page. You can change the long description for this applicant here.
Go	Click this button to go to another component.

Viewing Summary Checklist, Comment, and Communication Data

You can use summary pages for a quick view of checklists, comments and communications stored for prospects, applicants and recruiters. You can also view Operator 3C Groups pages for checklists, comments and communications.

- Use the Checklist Summary page (PERS_CHKLIST_SUMM) to access a summary of checklists associated with a recruiter, a prospect, or an applicant.

The Checklist Summary page enables you to designate which checklist information you want to see for a person.

- Use the Comment Summary page (CMNT_SUMMARY) to access a summary of comments associated with a recruiter, a prospect or an applicant.

The Comment Summary page enables you to designate which checklist information you want to see for a person.

- Use the Communication Summary page (COMM_SUMMARY) to view a summary of communications associated with a recruiter, a prospect, or an applicant.

This page enables you to designate which communication information you want to see for a person.

- Use the Operator 3C Groups Summary (Checklist) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Comment) (OPR_GRP_3C_SUM) page to view the user 3C groups to which you are assigned.
- Use the Operator 3C Groups Summary (Communication) page (OPR_GRP_3C_SUM) to view the user 3C groups to which you are assigned.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Using the 3C Engine"

Chapter 18

Performing EDI TS130 Transcript Transactions

This chapter provides overviews, lists prerequisites, and discusses how to:

- Set up ethnicity in the system.
- Process the schedule inbound EC agent.
- Load EDI data for transcript transactions.
- Review and edit the EDI TS130 staging pages.
- Use the Organization Search process.
- Set up TS130 search/match/post parameters, and process and post the EDI staging files.
- Purge the EDI TS130 staging table and messages.
- Purge all EDI messages.

Prerequisites

The EDI Manager provides the tools you need to manage electronic commerce transactions with your trading partners. To assist you in setting up the EDI Manager for recruiting and admissions application and transcript transactions, we have created some sample definitions in the EDI Manager. However, before processing EDI transactions, you might need to modify the setup to fit your particular needs. Therefore, it is important that you become familiar with PeopleSoft EDI architecture and recruiting and admissions processes to understand the implications of your EDI implementation decisions. The following paragraphs explain how this information *can* be set up.

When a trading partner submits an EDI transaction, it needs to address it to a specific business unit. In other words, the EDI agent needs to know in some way to which business unit to forward the transaction. Therefore, you must define entity codes that tell the EDI Manager where to forward the transaction. This PeopleSoft system includes sample entity codes for admissions transcript and application transactions, as well as sample internal and external partner definitions.

- The sample entity code provided for the Admissions Transcript Transaction (TS130) is ADTR - Admission Transcript Process.
- Two sample entity codes are provided for the Application for Admissions Transaction (TS189): ADAP - Admissions Applicant Processing and ADST - Admissions Applicant Student.

- The sample internal partner definition provided (for both the EDI TS130 and TS189 transactions) is Admissions - Admissions Office.
- The sample external partner definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_STX - Admissions EDI Supply Tech. As mentioned earlier, you might use another external partner as your EDI translator.

When you receive an EDI transaction from a trading partner, the first record of the transaction includes a *Transaction ID* that identifies the transaction type. The EDI agent uses the transaction ID, in conjunction with the trading partner ID, to determine which inbound map to use to process the transaction data. Similarly, when you initiate an outbound transaction, the EDI agent puts the appropriate transaction ID in the first transaction record so that the recipient knows what kind of transaction you have sent. The PeopleSoft system includes sample transaction definitions, partner profile definitions and conversion data profiles.

- The sample transaction definition provided for your ADM_TRNS_130 Admissions Transcript Transaction is ADM_TRNS_TS130 Inbound - Admissions Transcript Transaction.
- The sample transaction definition provided for your ADM_TRNS_189 Admissions Applicant Transaction is ADM_TRNS_TS189 Inbound - Admissions Applicant Transaction.
- The sample partner profile definition provided (for both the EDI TS130 and TS189 transactions) is ADM_EDI_P - Admissions EDI Transaction Profile.
- The sample conversion data profile provided is EDI_CONV - EDI TS130/TS189. Conversion Profile lists the conversion values used in your EDI load processing (for both the EDI TS130 and TS189 transactions).

Electronic commerce maps specify how the EDI Agent transfers data between PeopleSoft business documents and the staging tables in the PeopleSoft database. The EDI agent uses inbound maps to transfer data from PeopleSoft business documents to the staging tables, in preparation for processing by your Recruiting and Admissions application. PeopleSoft has created sample inbound map definitions.

- The sample inbound map definition provided for the Admissions Transcript Transaction (ADM_TRNS_TS130) is EC Map ID TS130_MAP.
- The sample inbound map definition provided for the Admissions Applicant Transaction (ADM_TRNS_TS189) is EC Map ID TS189_MAP.

When you add a trading partner, you assign to it a *map profile*, which lists the electronic commerce maps that the EDI agent can use to process transactions from the partner. The PeopleSoft system includes sample data mapping profile definitions.

The example data mapping profile definition provided is ADM_EDIMP - Admissions EDI Map Profiles. This definition lists the map assignments for the Admissions Transcript Transaction (ADM_TRNS_TS130) and the Admissions Applicant Transaction (ADM_TRANS_TS189).

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager," Setting Up Trading Partners

PeopleSoft Supported Integration Technologies: "EDI Manager," Defining EDI Transactions

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Electronic Commerce Maps

PeopleSoft Supported Integration Technologies: "Mapping EDI Transactions," Creating Map Profiles

Understanding EDI TS130 Transcript Transactions

Recruiting and Admissions enables you to load external academic transcripts through EDI (Electronic Data Interchange).

To perform EDI TS130 transcript transactions:

1. Process the inbound EC agent.

Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

2. Load the EDI data for transcript transactions.

Run the TS130 Load process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field of the Process Options page.

4. After you have corrected all of the load errors in the suspense files, run the organization search process.

This process looks for a match of the organization based on the ATP, ACT, FICE, or IPEDS code loaded against the same codes stored on the Organization Table, School Data page. The system compares the EDI School Subject and EDI Course Number on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page.

5. Resolve and edit any course errors resulting from the organization search process.

In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the course or organization errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field of the Process Options page. If more than one match is found for an organization, the EDI Org Process Options Search field will be set to *Error* and the Search/Match results will show the number of schools that matched on the code used as shown. You will need to resolve that error and run the Organization Search process again for the courses to be populated.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

6. After you have corrected all of the organization and course errors in the suspense files, run the search/match/post process.

This process looks for data in your database (based on search parameters that you defined on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

7. Check each suspense record that did not get posted to see if it is actually a duplicate.

In the search dialog page of the TS130 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field, and then click the Search button. The search process finds only those suspense records that went through the search/match/post process but were not posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, and then use search/match to look up the bio/demo information that matches the suspense record and decide whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record.

8. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Develop Enrollment, Process External Data, Use, Bio/Demo Data. To view a test score record that the search/match/post process created or updated, select Develop Enrollment, Process External Data, Use, Test Scores.

Purge TS130 staging table records on the TS130 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your TS130 processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer need to view them.

See Also

[Chapter 18, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 312](#)

[Chapter 13, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 155](#)

[Chapter 17, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 215](#)

Understanding the EDI Applications and Transcripts Business Process

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

Recruiting and Admissions supports EDI transactions for transcripts and applications. For example, an applicant can fill out an application online using a third-party vendor, which then sends the application electronically to your institution. Additionally, an external institution can electronically send you an applicant's transcripts. In either case, you can load the data from a file into staging tables, review the data, and post it to your database.

The EDI transaction supported for the *transcript* load is the Admissions Transcript Transaction (ADM_TRNS_TS130). The data transmitted through the EDI data load includes personal information, academic status, dates of attendance, session and course information, grades earned, degrees awarded, testing information, and more.

The inbound transaction supported for the *application* load is the Admissions Applicant Transaction (ADM_TRNS_TS189). The data transmitted through the EDI data load includes personal information, names, addresses, residence data, application entry and questions, session and course information, degrees awarded, testing information, and more.

If you receive a transcript or application for a person who does not exist in your database, the system can add the person to your system (depending on the parameters you set up). If the person already exists in your database, the system can update the person's records (depending on the parameters you set up).

The file that you load into EDI Manager is a business document that you receive from an EDI translator. The example setup provided with your system was developed using a Supply Tech business document. Your institution, however, might receive your business document from another EDI translator.

See Also

PeopleSoft Supported Integration Technologies: "EDI Manager"

Setting Up Ethnicity in the System

You must ensure that your system is set up to correctly populate ethnicity information during the TS130 and TS189 posting processes. To do so:

- Change your internal mapping values for ETHNIC_GRP on the Conversion Data Profile page (PeopleTools, EDI Manager, Convert EDI/PeopleSoft Code, Conversion Data Profile) for the EDI Convert Profile ID of EDI_CONV.
- Verify that the new values reflect those you defined for ethnic groups on the Ethnic Groups page (Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups).

This is an example of ethnic groups defined on the Conversion Data Profile page:

Conversion Data Profile

Cvt Pro ID: EDI_CONV
Description: EDI TS130/TS189 Conversn Prof
Source Profile:

Conversion Find | View All First 10 of 29 Last

***Cvt TypeID:** ETHNIC_GRP EDI TS130/TS189 Ethnic Group ☐ Setid Based
☐ No-Value Pass Thru **Default Value:**

Conversion Values Find | View 3 First 1-8 of 8 Last

Internal Value	Int Deflt	External Value:	Ext Deflt
WHITE	☐	C	☒
WHITE	☒	O	☒
AFRAM	☒	B	☒
AFRAM	☐	N	☒
HISPA	☒	H	☒
ASIAN	☒	A	☒
AMIND	☒	I	☒
NSPEC	☒		☒

Example of ethnic groups defined on the Conversion Data Profile page

Processing the Schedule Inbound EC Agent

Use the Schedule Inbound EC Agent (inbound electronic commerce agent) page to specify the location of the file that you want to load into the suspense file. The Schedule Inbound EC Agent (ECIN0001.sqr) process converts the data in the file according to your setup in the EDI Manager. After the process converts the data, it loads it into temporary files until you run the load process.

To process the inbound EC agent for recruiting and admissions transactions:

1. Select PeopleTools, EDI Manager, Monitor EDI Processing, Schedule Inbound EC Agent.
2. Select the Single File run option.

3. In the Single File Path field, enter the directory path of the file that you want to load.
4. In the Single File Name field, enter the name of the file that you want to load.
5. Select *Do Not Force* in the Force Profile group box.
6. Clear the check boxes in the File Options group box.

See Also

PeopleSoft Supported Integration Technologies, "EDI Manager"

Loading EDI Data for Transcript Transactions

This section discusses how to use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables. You can also elect to create a TS131 acknowledgement file with this process. You send acknowledgement files to the institution that sent you the transcript. It acknowledges the receipt of the transcript and confirms that the institution the transcript was sent to was the institution that received it, and that the information sent is correct. Since you send the acknowledgement file to the institution that sent the transcript, it also confirms for you that the transcript came from the proper office at the institution indicated as the sender and that certain key elements of the transcript were received as they were sent. Before you can create EDI TS131 acknowledgement files, you must define defaults for the acknowledgement files on the TS130/TS131 Setup page.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "Setting Up Transcripts," Defining TS130 and TS131 Controls

PeopleSoft Student Records 9.0 PeopleBook, "Producing Transcripts," Reviewing TS130 Outbound Transactions

Page Used to Load EDI Data for Transcript Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Load Parameters	ADM_TS130_LOD_PARM	Student Admissions, Application/Transcript Loads, TS130, Load Process	Use the EDI TS130 Load Parameters page to load EDI TS130 transcripts into staging tables.

Loading TS130 Transcripts into Staging Tables

Access the EDI TS130 Load Parameters page (Student Admissions, Application/Transcript Loads, TS130, Load Process).

TS130 Load Parameters

Run Control ID: TS130

[Report Manager](#) [Process Monitor](#) Run

Regulatory Region:

USA

United States

☐ Create Acknowledgement (TS131)

Institution:

PSUNV

PeopleSoft University

File Name:

Name Prefix Parms

Male:

Female:

Unknown:

Name Usage

Find | View All

First

1 of 1

Last

Usage Order

EDI Name Type

1

+

-

TS130 Load Parameters page

Warning! You should complete the full loading, search/match, and posting processes before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data in your staging files.

Regulatory Region	The system uses the value entered here to populate ethnic group fields during TS130 staging. Important! Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.
Create Acknowledgement (TS131)	Select to create a TS131 acknowledgement file. The system creates the file according to the standards defined on the TS130/131 Setup page. After the system creates the file, you can send it to the original sending institution to acknowledge receipt of the transcripts.
Institution	Enter your institution code. The system uses the institution code to determine which setup values to use from the TS130/131 Setup page when creating the file.
File Name	Enter the path to where you want the system to write the file, and enter the name of the created file.

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Male, Female, and Unknown An EDI load does not include a person's prefix. It does, however, include gender. In these fields, select the prefix that you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

After you load the data into staging files, you can view the data in the EDI TS130 Staging pages.

EDI Name Type

Select the path to where you want the system to write the file, and enter the name of the created file. Since a transaction can have multiple names for a student, you must indicate which name type to use for the Primary PeopleSoft name. This is the name posted to the NAMES table. Indicate, in hierarchical order, the EDI name types you want to use for this purpose. These are delivered translate values, based on the name types defined in the TS130 Standards documentation. It is important that you enter all EDI name types that you may receive. If a name type is not entered and the student only has that name type, then the student will be loaded with a blank name and the record will display an error.

Click the Run button to run the EDI TS130 Transcript Load/Edit process at user-defined intervals.

Reviewing and Editing the EDI TS130 Staging Pages

You can use the EDI TS130 Staging component to review or edit the transcript data that you loaded through the EDI transaction. If you have not run the posting process, any changes you make post to your database when you run the posting process, which means the data posts to the person's record (unless otherwise noted).

The EDI TS130 transcript staging pages are holding tables and are not linked to your database. Personal, organization, and transcript data from these tables post to your database during the posting process, but the data is not shared. In other words, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data, to the Education component, and to the Test Results page. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

You can access the EDI TS130 Staging pages to review the information stored here at any time during the Processing TS130 transcript business process. For example, you might prefer to look at the data immediately after loading it, after running the organization search process, after posting it, or after each of those steps, depending on your procedures.

Note. Be cautious when editing the data in your staging files prior to posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the applicable page in your application to make any changes.

This section discusses how to review EDI TS130:

- Staging process options.
- Organization staging process options.
- Name data.

- Address data.
- Staging bio/demo data.
- Staging bio/demo (2) data.
- Requirements, attributes, and proficiencies.
- Previous college data.
- Staging organization demographic data.
- Staging academic status data.
- Staging activity data.
- Staging test score data.
- Staging session data.
- Staging academic summary data.
- Staging course data.
- Staging degree data.
- Staging additional information.
- Messages in the staging table.

See Also

The Postsecondary Electronic Standards Council Website

Pages Used to Review and Edit the EDI TS130 Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI TS130 Process Options	ADM_TS130_PROC_OPT	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Process Options	Review or edit the process options in your EDI TS130 staging table. This page provides the status of an EDI TS130 transcript record regarding the loading, search/match and posting processes. You can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.

Page Name	Definition Name	Navigation	Usage
EDI TS130 Org Process Options (organization process options)	ADM_TS130_ORG_OPT	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Process Options	Review or edit the process options for external organization records in your EDI TS130 staging table.
EDI TS130 Names	ADM_TS130_NAMES	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Names	Review or edit the names of applicants loaded through the EDI TS130 data load.
EDI TS130 Addresses	ADM_TS130_ADDR	Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Addresses	Review or edit the addresses of applicants loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo (biographical/demographic)	ADM_TS130_BIODEMO1	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
EDI TS130 Bio/Demo 2 (biographical/demographic 2)	ADM_TS130_BIODEMO2	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo (2)	Review and edit the biographical and demographic data loaded through the EDI TS130 data load.
EDI TS130 RAP (requirements, attributes, and proficiencies)	ADM_TS130_RAP	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 RAP	Review or edit transcript degree data loaded through the EDI TS130 data load. Requirement, Attribute, and Proficiency information fall under a session.
EDI TS130 Previous Colleges	ADM_TS130_PCL	Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Previous Colleges	Review or edit previous college data loaded through the EDI TS130 data load.
EDI TS130 Org Data (organization data)	ADM_TS130_ORG_DEMO	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Data	Review and edit the organization demographic data loaded through the EDI TS130 data load. This page contains data about the external organization that this transcript data is regarding. Organization data does <i>not</i> post to your database.

Page Name	Definition Name	Navigation	Usage
EDI TS130 Acad Status (academic status)	ADM_TS130_SST	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Acad Status	Review or edit high school academic status data loaded through the EDI TS130 data load. If the organization you are viewing is a high school, this page contains high school academic information about the person in regard to this organization.
EDI TS130 Activities	ADM_TS130_ACTIVITY	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Activities	Review or edit transcript degree data loaded through the EDI TS130 data load. Activity information falls under a session.
EDI TS130 Test Scores	ADM_TS130_TESTS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Test Scores	Review or edit test score data loaded through the EDI TS130 data load.
EDI TS130 Sessions	ADM_TS130_SES	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Sessions	Review or edit transcript session data loaded through the EDI TS130 data load. Multiple sessions can come from one organization. For example, one session could make up the Fall of 9th grade, whereas another session could make up the Spring of 9th grade.
EDI TS130 Academic Summary	ADM_TS130_ACAD_SUM	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Academic Summary	Review or edit academic summary data loaded through the EDI TS130 data load.
EDI TS130 Courses	ADM_TS130_CRS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Courses	Review or edit transcript course data loaded through the EDI TS130 data load.
TS130 Course Detail	ADM_TS130_CRS_SEC	Click the Course Detail link on the EDI TS130 Courses page.	View additional course information.

Page Name	Definition Name	Navigation	Usage
EDI TS130 Degrees	ADM_TS130_DEG	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Degrees	Review or edit transcript degree data loaded through the EDI TS130 data load. Degree information falls under a session.
EDI TS130 Additional Info	ADM_TS130_ADDL	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Additional Info	Review or edit additional information loaded through the EDI TS130 data load.
EDI TS130 Messages	ADM_TS130_MSGS	Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Messages	View EDI TS130 processing messages.

Reviewing EDI TS130 Staging Process Options

Access the EDI TS130 Process Options page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Process Options).

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	6	In/Out:	Inbound
Cntrl Num:	0965	Dt Loaded:	06/06/2008	Posted Dt.:	06/06/2008
Last Name:	Bumble	First Name:	Aaron	Middle Initial:	A
Processing Options					
*Edit:	Complete	*Search:	Complete	*Post:	Purge
Error Indicators					
☐ Last Name	☐ First Name	☐ Test Component	☐ Course Error		
Search / Match Results					
Order Nbr:	0	Matches:	0		

EDI TS130 Process Options page

Processing Options

Edit

The system displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the transcript data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the transcript data. The system indicates the values that you need to correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete*.

Perform: You set this value manually. It is for informational purposes only.

Search

The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the transcript data without a problem. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the Bio/Demo page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Error: The search/match process encountered problems when posting the transcript data.

Perform: The search/match process processes this record the next time you run the process.

Post

The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the following table.

<i>Post Value</i>	<i>Meaning</i>	<i>How Set</i>
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.

Post Value	Meaning	How Set
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process. When set manually it means that the process identified a match and you determined manually that no duplication exists. When you run the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually it means that the process identified a match and you determined manually that a duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Error Indicators

Last Name, First Name, Test Component, and Course Error

When a load error occurs, the load external data process selects the required values that were missing or incorrect in the load. Go to the Bio/Demo page, the Tests page, or another page is the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box. After you clear all of the check boxes and save the component, the system enters *Complete* in the Edit field.

Search/Match Results

Order Nbr

You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide whether or not a possible duplication exists.

Matches

The system displays the number of matches the process found at the given order number.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Organization Staging Process Options

Access the EDI TS130 Org Process Options page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Process Options).

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound		
Cntrl Num:	0901	Dt Loaded:	10/08/2004				
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N		
External Organizations				Find View All First 1 of 1 Last			
Organization							
Description: Landmark College							
Processing Options							
*Edit:	Complete	*Search:	Complete	*Post:	Update ID		
Search / Match Results							
Matches: 1							

EDI TS130 Org Process Options page

This page provides the status of EDI TS130 transcript organization data regarding the loading, search/match and posting processes. You can determine if an external organization record is waiting to be processed, if the person linked to this organization record instigated a new ID to be added to your database, or if any errors were encountered during the search/match or loading processes.

When organization data comes in with an EDI load, the system does not create new organizations in your database. During the Organization Search process, the system searches through your database to find a *matching* external organization for the organization data that comes in. Therefore, the organization must already exist in your database for this transcript data to process. An error occurs if the process does not find a matching organization.

Organization data is linked to a personal EDI TS130 record. The organization controls the transcript information related to the person linked to this record. The system does not process the organization data until you process the matching personal record.

Processing Options

Edit

The system displays the status of the load process for this organization suspense record. The load process populates this value.

Complete: The load process loaded the organization data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the organization data. View details about the error on the EDI TS130 Messages page. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete*.

Perform: You set this value manually. This is for informational purposes only.

Search

The system displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process posted the organization data without a problem.

Error: The search/match process encountered problems when posting the organization data.

Perform: The search/match process processes this record the next time you run the process.

Post

The system displays the status of the record regarding the search/match/post process. These values can be entered manually, however, some are entered by the system after you run the processes as described in the following table.

<i>Post Value</i>	<i>Meaning</i>	<i>How Set</i>
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.

Post Value	Meaning	How Set
New ID Add	The system was unable to find a match for this organization in your database. To post data for this person regarding this organization, you must manually enter a valid organization ID on the EDI TS130 Org Data page.	Set by the system during the search/match process if no matching organization was found in your database.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.
Update ID	The system found a matching organization ID in the database. Consequently, data from this organization for this person can be updated.	Set by the system during the search/match process if a matching organization was found in the database.
Wait Search	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the *Edit*, *Search* and *Post* fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you might experience problems when posting the data.

Search/Match Results

Matches The system displays number of external organization matches found in your database for this record.

Note. Additional status information can be viewed on the EDI TS130 Messages page.

Reviewing EDI TS130 Name Data

Access the EDI TS130 Names page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Names).

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound		
Cntrl Num:	0901	Dt Loaded:	10/08/2004				
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N		
Name Type Find View All First 1 of 1 Last							
Given Name (Name at Birth)							
Name Components Find View All First 1-3 of 3 Last							
First	MELISSA						
Last	HARRIS						
Middle	N						

EDI TS130 Names page

View all the names parts loaded for the student by name type. The name appearing at the top of the page is the name that will be posted to the NAMES record. This name was determined by the Name types you entered on the TS130 Load Parameters page.

Reviewing EDI TS130 Address Data

Access the EDI TS130 Addresses page (Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Addresses).

EDI TS130 Process Options		EDI TS130 Org Process Options		EDI TS130 Names		EDI TS130 Addresses	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound		
Cntrl Num:	0901	Dt Loaded:	10/08/2004				
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N		
Addresses Find View All First 1 of 1 Last							
Name Type: Given Name (Name at Birth)							
Address Type: Home Address							
Address Type: Mailing Address							
Address Type: Permanent Address							

EDI TS130 Addresses page

View the address types loaded for the student. Click the Address button to access the TS130 Address, where you can view the address loaded through the TS130 Load process. You can also click the Edit Address link on the TS130 Address page to edit address data. If a new record is created when you post EDI TS130 data, address information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record.

Reviewing EDI TS130 Staging Bio/Demo Data

Access the EDI TS130 Bio/Demo page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo).

EDI TS130 Names

EDI TS130 Addresses

EDI TS130 Bio/Demo

EDI TS130 Bio/Demo (2)

EDI TS130 RAP

Trans ID:

ADM_TRNS_TS130

Queue Inst:

1

In/Out:

Inbound

Cntrl Num:

0901

Dt Loaded:

10/08/2004

Last Name:

Harris

First Name:

Melissa

Middle Initial:

N

Bio/Demo Data

ID:

SSN:

559-78-1210

Date of Birth:

07/04/1983

Birth Location:

CHICAGO

Birth Country:

USA

United States

Birth State:

IL

Illinois

Reference Numbers

Find | View All

First

1 of 1

Last

Ref Nbr

PIN

Number:

0543

Qualifier:

EDI TS130 Bio/Demo page

The EDI TS130 Bio/Demo page contains biographical and demographic data for the person from the EDI TS130 transcript load.

If the system creates a new record when you post EDI TS130 data, the system uses personal information from this page to populate the new record. If the system finds a matching record in your database this EDI TS130 personal data does *not* overwrite any bio/demo data in the existing record, even if you have specified that matching records should be updated with EDI TS130 data. To protect verified information, the system never updates bio/demo data through external data loads.

If you have not run the posting process and you edit the data on this page, then the edited data posts to the person's record when you post the data.

ID

After the load process runs, this field is display-only and is empty. After the search/match process runs this field is accessible and contains the ID of the person in your database if a match was found, or *NEW* if a new record will be added during the posting process. After the posting process runs, this field is display-only and displays the ID of the person in your database to whom this EDI data posted.

This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here if the process created a new record.

If the process finds a match and updates an existing record, the process enters the ID of the record that it updated.

If the process finds a match and dumps the record into the suspense table, and you decide to update an existing ID (by selecting *Update ID* in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.

Ref Nbr Qualifier (reference number qualifier)

The type of reference number indicated in the EDI TS130 load for this person.

Number (reference number)

The actual reference number from the EDI TS130 load.

Reviewing EDI TS130 Staging Bio/Demo (2) Data

Access the EDI TS130 Bio/Demo (2) page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Bio/Demo (2)).

EDI TS130 Names				EDI TS130 Addresses		EDI TS130 Bio/Demo		EDI TS130 Bio/Demo (2)		EDI TS130 RAP	
Trans ID:	ADM_TRNS_TS130		Queue Inst:	1		In/Out:	Inbound				
Cntrl Num:	0901		Dt Loaded:	10/08/2004							
Last Name:	Harris		First Name:	Melissa		Middle Initial:	N				
Bio/Demo Data											
Citizen Country:	USA		United States								
Citizenship Status:	1		Native								
Gender:	Female										
Name Prefix:	Ms										
Marital Status:	Unknown										
Ethnic Group:	Black										
Highest Education Level:	Not Indic										
☐ Disabled ☐ Full-Time Student											

EDI TS130 Bio/Demo (2) page

If a new record is created when you post EDI TS130 data, personal information from this page is used to populate the new record. If a matching record is found in your database and you have defined that matching records should be updated with EDI TS130 data, this EDI TS130 personal data does *not* overwrite any data in the existing record. If you have not run the posting process and you edit the data on this page, the edited data posts to the person's record when you post the data.

- Disabled

The system selects this check box if the record indicates that the person is disabled.
- Full-Time Student

The system selects this check box if the record indicates that the person is a full-time student.

Reviewing EDI TS130 Requirements, Attributes, and Proficiencies

Access the EDI TS130 RAP page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 RAP).

EDI TS130 Names

EDI TS130 Addresses

EDI TS130 Bio/Demo

EDI TS130 Bio/Demo (2)

EDI TS130 RAP

Trans ID:ADM_TRNS_TS130

Queue Inst:1

In/Out:Inbound

Cntrl Num:0901

Dt Loaded:10/08/2004

Last Name:Harris

First Name:Melissa

Middle Initial:N

Requirements, Attributes and Proficiencies

Find | View All | First 1 of 1 Last

Test/Requirement Code:MAT

Description 1:Miller Analogies Test

Description 2:

Usage Indicator:Reqmnt

Status Date:10/10/2004

☐ Condition or Response Code

EDI TS130 RAP page

- Test/Requirement Code

Indicates a particular national, regional, state, or local requirement for a course.
- Description 1

Specifies the *main* category of the requirement, attribute, or proficiency.
- Description 2

Specifies the *lesser* category of the requirement, attribute, or proficiency.
- Usage Indicator

Designates the achievement or characteristic being described as a requirement, an attribute, or a proficiency. Possible values are *Attribute*, *Prfncy* (proficiency), and *Reqmnt* (requirement).
- Condition or Response Code

If selected, indicates that the student or course meets the requirement, attribute, or proficiency.

Reviewing EDI TS130 Previous College Data

Access the EDI TS130 Previous College(s) page (Student Admissions, Application Transcript Loads, TS130, TS130 Staging, EDI TS130 Previous College(s)).

EDI TS130 RAP

EDI TS130 Previous College(s)

EDI TS130 Org Data

EDI TS130 Acad Status

Trans ID:

ADM_TRNS_TS130

Queue Inst:

1

In/Out:

Inbound

Cntrl Num:

0901

Dt Loaded:

10/08/2004

Last Name:

Harris

First Name:

Melissa

Middle Initial:

N

Previous College

Find | View All

First

1 of 1

Last

Institution Code Qualifier:

98

Institution Code:

456389475-B

Begin Date:

09/10/2001

31

End Date:

06/06/2002

31

Degree:

CERT

Certificate

Degree Date:

6/6/2002

Previous Institution Name:

Carlson Community College

EDI TS130 Previous College(s) page

View previous colleges supplied by the sending institution on this page. Information includes the institution name, the begin and end dates, as well as degree data. This data is informational only and not posted to the Education component.

Reviewing EDI TS130 Staging Organization Demographic Data

Access the EDI TS130 Org Data page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Org Data).

EDI TS130 RAP

EDI TS130 Previous College(s)

EDI TS130 Org Data

EDI TS130 Acad Status

Trans ID:ADM_TRNS_TS130

Queue Inst:1

In/Out:Inbound

Cntrl Num:0901

Dt Loaded:10/08/2004

Last Name:Harris

First Name:Melissa

Middle Initial:N

External Organization

Find | View All

First1 of 1Last

Description:Carlson College

*Organization Type:School

External Org ID:000010092Landmark College

Term Type:Quarter

External Career:Undergrad

*Inbound School Type:ASPost-Secondary Record Sender

ACT Code:

ATP Code:ATP

FICE Code:

IPEDS Code:

Save

Return to Search

Next in List

Previous in List

Notify

EDI TS130 Org Data page

Note. An organization must exist in your database for transcript data from that organization to post to your database. If the organization search process resulted in multiple or no matches, you need to manually choose an organization ID on this page. If the organization does not exist in your database, you need to add a new organization to your database and then return to this page and insert the new ID. The organization search process must be run again to process the courses for the new external organization once it is entered on this page.

Description	The descriptive name of this external organization as provided in the EDI load.
Organization Type	The type of external organization (such as <i>School</i>). Values for this field are delivered with your system as translate values. You can modify these translate values.
External Org ID (external organization ID)	If the organization search process found a match for this organization in your database, its ID appears. If more than one or no potential match is found during the organization search process, <i>Error</i> appears in the Search field of the Org Process Options page. In such a case, an organization does not appear in this page. To investigate the reason for the error, go to the EDI TS130 Staging - Messages page. If no match is found, you must manually choose the appropriate organization ID. If the organization does not exist, you need to add it to your database and then return to this page to select the new ID. See <i>PeopleSoft Campus Community 9.0 Fundamentals PeopleBook</i>, "Adding Organizations to Your Database."

Term Type	The type of term used by this external organization.
External Career	The external career for this organization. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Graduate, High School, Law, Medical</i> , and <i>Undergraduate</i> .
Inbound School Type	The EDI school type for this external organization comes from the EDI record. Its description appears next to the field.
ACT Code, ATP Code, FICE Code, and IPEDS Code	The ACT code, ATP code, FICE code, and IPEDS code appear. The organization search process uses these codes to search for a matching external organization in the database.
Organization Address	Click this button to access address information for this external organization.

Reviewing EDI TS130 Staging Academic Status Data

Access the EDI TS130 Acad Status page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Acad Status).

The screenshot displays the 'EDI TS130 Acad Status' page within a web application. The top navigation bar includes tabs for 'EDIT TS130 RAP', 'EDI TS130 Previous College(s)', 'EDI TS130 Org Data', and the active 'EDI TS130 Acad Status' tab. Below the navigation bar, a form displays student information: Trans ID: ADM_TRNS_TS130, Queue Inst: 1, In/Out: Inbound, Cntrl Num: 0901, Dt Loaded: 10/08/2004, Last Name: Harris, First Name: Melissa, and Middle Initial: N. The 'Academic Status' section features a table with columns for HS Grad Type (HS Diploma), Eligibl to Rtrn (Expelled), Enroll Status (B31, Currently Enrolled), and Residency (Yes). The 'Entry and Exit Information' section includes fields for SSE Nbr, Entry Date, and Exit Date, each with a calendar icon.

EDI TS130 Acad Status page

View additional information about the student's attendance at the organization listed on the EDI TS130 Org Data page. After you post the EDI TS130 data, you can view transcript data for this person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Activity Data

Access the EDI TS130 Activities page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Activities).

EDI TS130 Activities page

Qualifier Code Identifies a specific industry code list, such as *Activ Cd* (activity code) or *Award Cd* (award code).

Note. You can view activity code information on the Extracurricular Activities page and award code information on the Honors/Awards page after the person becomes a prospect or applicant and the data is posted to the database.

Reviewing EDI TS130 Staging Test Score Data

Access the EDI TS130 Test Scores page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Test Scores).

EDI TS130 Test Scores page

Test ID	The ID of the test taken by this person. Define test IDs on the Test Tables page.
Test Date	The PeopleSoft standard date format as translated from the EDI test date.
Test Date Error	The system selects this check box if it detected an error on the test date.
Test Level	A free-form text description of the level of the test for cases in which there are multiple levels to a test. For example, for the International Baccalaureate Test, "H" represents the higher level and "S" represents the subsidiary level.
Component	The system translates the test component to your institution component code by matching the subtest code delivered with the EDI load and the subtest code on the Test Tables page.
Subtest (subtest code)	The test component code from the EDI record. A corresponding subtest code must be defined for the test component on the Test Table for the test component to be populated during the TS130 load process.
Score	The reported score from the EDI load.
Post	The system selects this check box if the component will be posted to your database.
Error	The system selects this check box if it detected an error on the test component.

Note. You can view the test results posted for a person through the Academic Test Summary page or the Test Results page.

Reviewing EDI TS130 Staging Session Data

Access the EDI TS130 Sessions page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Sessions).

EDI TS130 Org Data		EDI TS130 Acad Status		EDI TS130 Activities		EDI TS130 Test Scores		EDI TS130 Sessions	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound				
Cntrl Num:	0901	Dt Loaded:	10/08/2004						
Last Name:	Harris	First Name:	Melissa		Middle Initial:	N			
Session Data Find View All First 1 of 1 Last									
Session Number:	1	Term Type:	Quarter						
Career:	High Schl	Ext Term:	SPR	Spring					
Acad Level:	10th Grade	Term Year:	2001						
Dates of Attendance									
From Date:	07/02/2001	To Date:	09/19/2001						
Transcript									
Certificate Received Date:	10/08/2004	Data Medium:	EDI						

EDI TS130 Sessions page

Term Type

The term type used by this external organization. Values for this field are delivered with your system as translate values. You can modify these translate values.

Career

The external career to which this transcript session pertains. Values for this field are delivered with your system as translate values. You can modify these translate values.

Ext Term(external term)

The actual external term that this data applies to (such as *FALL* or *SPRING*). The values available to you in this field depend on what you entered in the Term Type field. Define external terms on the External Term Table page.

Acad Level(academic level)

The academic level of the person at the time this data was collected or issued. Values for this field are delivered with your system as translate values. You can modify these translate values. Examples of the values are *10th Grade*, *11th Grade*, *Freshman*, and *Postdoctoral*.

Term Year

The term year relevant to this session.

From Date and To Date

The first and last date that the applicant attended this school for this session.

Certificate Received Date

The date that you ran the EC Inbound Agent process.

Data Medium

The data medium default for this session is *EDI*. Values for this field are delivered with your system as translate values. You can modify these translate values.

Reviewing EDI TS130 Staging Academic Summary Data

Access the EDI TS130 Academic Summary page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Academic Summary).

EDI TS130 Test Scores EDI TS130 Sessions EDI TS130 Academic Summary EDI TS130 Courses EDI TS130 Degrees					
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound
Cntrl Num:	0901	Dt Loaded:	10/08/2004		
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N
Academic Summary Find View All First 1 of 1 Last					
Session Number:	1	From Date:	07/02/2001	To Date:	09/19/2001
Find View All First 1 of 2 Last					
Unit Type:	Quarter	Course Level:	Regular		
External GPA:	3.000	Cumulative:	N		
Completed:	5.00	Attempted:	5.00		
Class Size:		Class Rank:			
Hours Earned:					

EDI TS130 Academic Summary page

View academic data specific to the session listed for the student. This data will include grade point average (GPA), units attempted and completed, as well as class rank information. If an *N* appears in the Cumulative field, the data shown is specific to the session listed. If a *Y* appears in the Cumulative field, the data is cumulative to show overall academic statistics as of the end of the session listed. The latest cumulative information is posted to the academic summary section of the Education component during the search/match/post process.

Reviewing EDI TS130 Staging Course Data

Access the EDI TS130 Courses page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Courses).

The screenshot displays the 'EDI TS130 Courses' page within a web application. At the top, there are navigation tabs: 'EDI TS130 Test Scores', 'EDI TS130 Sessions', 'EDI TS130 Academic Summary', 'EDI TS130 Courses' (selected), and 'EDI TS130 Degrees'. Below the tabs, a header section contains the following information:

- Trans ID:** ADM_TRNS_TS130
- Queue Inst:** 1
- In/Out:** Inbound
- Cntrl Num:** 0901
- Dt Loaded:** 10/08/2004
- Last Name:** Harris
- First Name:** Melissa
- Middle Initial:** N

The main section is titled 'Course Data' and includes a 'Find | View All' link and pagination 'First 1 of 1 Last'. Below this, a sub-section shows 'Session Number: 1', 'From Date: 07/02/2001', and 'To Date: 09/19/2001'. The course details are as follows:

- External Course Number:** 1
- School Subject:** MATH (with a search icon)
- Course Nbr:** 105 (with a search icon)
- EDi School Subject:** MATH Math
- Inbound Course Number:** 105 INTERMEDIATE ALGEBRA
- EDi External Course Type:** Regular Enrollment (dropdown menu)
- Course Level:** Regular (dropdown menu)
- Units Taken:** 5.00
- Grd In/Official:** (checkbox)

There are two checkboxes: 'Crse Error' (unchecked) and 'Course Post' (checked). A 'Course Detail' button is also visible.

EDI TS130 Courses page

The Org Search Process finds course matches based on the EDI School Subject and EDI Course Number. The EDI fields are compared against the School Subject and School Course Number defined for the Organization on the School Course Classification page. If a match is found, the School Subject, Course Number and Description from the School Course Classification Table are populated on EDI TS130 Courses and the Course Post flag is set to Y. If a match is not found based on the Subject and Number during the Org Search Process, the Edit Process Option will be set to Error and the Course Error flag will be set to Yes on the EDI TS130 Process Options page.

You can choose to post the course without having a match. The error flag will not be set on the course and you are able to select Course Post which allows the course to be posted to External Course instead of having to manually data enter the course. You can select the School Subject and Course Nbr prompts to search for an appropriate course or leave the fields populated as they are. If you determine you want this course to be posted even though a match was not found, select Course Post and Save. If you select Course Post for all the courses that did not find a match and save, the Edit Process Option on EDI TS130 Process Options will automatically change from Error to Complete. If you decide not to post one or more courses, you will need to manually go change the Edit Process Option to Complete in order for the transcript to be posted.

External Course Number	The sequential number of this row of course data. The first data item (or row) loaded is 1. The next row is 2. Courses fall under a session.
Crse Error (course error)	The system selects the course error display-only check box if there was an error during the posting process. For example, the system selects this check box if it fails to find a matching course for the course loaded through the EDI load. See the Messages page for more information on this error.
Course Post	The system selects this check box if this course will be posted to your database.

School Subject	If the system finds an external subject area on the School Course Classification page for this school that matches the external subject area loaded through the EDI load, it populates the subject area from the School Course Classification page here. If it does not find a match, it populates the value from the External Subject Area field here, and selects the Crse Error check box. The system compares the subject areas when you post the record.
Course Nbr (course number)	If the system finds a course description and external subject area on the School Course Classification page that matches the description of the EDI course number and the external subject area from the load, it populates the course number here, and the description in the field to the right. If it does not find a match, the system leaves this field blank and selects the Crse Error check box. The system compares the course descriptions when you post the record.
Career	The external career comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.
EDI School Subject	The external subject area loaded from the EDI load. When you post this record the system compares this value to the external subject areas and course descriptions set up for this external organization on the School Course Classification page. If it finds a match it populates the School Subject field with the corresponding subject area from the School Course Classification page. If it does not find a match the system populates the School Subject field with the value in this field. The description appears next to the field.
EDI Course Number	The course number loaded from the EDI load. The description from the EDI load appears next to this course field. When you post this record the system compares the description of the EDI course number and the external subject area to the course descriptions and external subject areas set up for this external organization on the School Course Classification page. If it finds a match it populates the Course Nbr field with the corresponding course number from the School Course Classification page. If it does not find a match the system leaves the Course Nbr field blank and selects the Crse Error check box. The Description field is display-only if a match is found from your School Course Classification setup. If a match is not found, you can edit the Description field.
EDI External Course Type	The external course type defining this course, such as <i>Course</i> and <i>Event</i> . External Course Type comes from the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.
Course Level	The course level comes from the EDI load. This course could be described, for example, as an <i>Honors</i> , <i>AP</i> , or <i>Regular</i> course. Values for this field are delivered with your system as translate values. You can modify these translate values.

Units Taken	The number of units taken for this course.
Grd In/Official (grade in/official)	The grade information for this course.
Course Detail	Click this button to view additional data regarding this course.

Note. View transcript data posted through the EDI load for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Degree Data

Access the EDI TS130 Degrees page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Degrees).

EDI TS130 Test Scores

EDI TS130 Sessions

EDI TS130 Academic Summary

EDI TS130 Courses

EDI TS130 Degrees

Trans ID:ADM_TRNS_TS130

Queue Inst:1

In/Out:Inbound

Cntrl Num:0901

Dt Loaded:10/08/2004

Last Name:Harris

First Name:Melissa

Middle Initial:N

Find | View All

First1 of 1Last

Session Number:From Date:To Date:

Find | View All

First1 of 1Last

Degree Nbr:

Degree Date:

31

Degree:

Description:

Honors Category:

Degree Status:Complete

Field of Study 1:

Field of Study 2:

EDI TS130 Degrees page

Degree Nbr (degree number)	Displays the sequential number of this row of degree data. The first data item (or row) loaded is 1 and the next row is 2.
Degree Date	The date the student received or will receive this degree.
Honors Category	Honors the person received for this degree (if applicable). Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are <i>Cum Laude</i> , <i>Magna Cum Laude</i> , <i>None</i> , and <i>Summa Cum Laude</i> .
Field of Study 1 and Field of Study 2	The particular subject areas or concentrations for this degree (if applicable).

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Note. You can view the degree data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing EDI TS130 Staging Additional Information

Access the EDI TS130 Additional Info page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Additional Info).

EDI TS130 Academic Summary

EDI TS130 Courses

EDI TS130 Degrees

EDI TS130 Additional Info

EDI TS130 Messages

Trans ID:ADM_TRNS_TS130

Queue Inst:1

In/Out:Inbound

Cntrl Num:0901

Dt Loaded:10/08/2004

Last Name:Harris

First Name:Melissa

Middle Initial:N

Additional Information

EDI Trans Type:Original

Transaction Type:Postsec

Ref Nbr Qual:SY

Status Reason:B48

Unit Type:Q

Reference Number:900836286

Cumulative:Y

Course Level:U

Attempted:5.00

External GPA:3.000

Class Rank:

Completed:5.00

Hours Earned:5.000000

Class Size:

Name Component:05

Date Time Period:

Name:HARRIS

EDI TS130 Additional Info page

EDI Trans Type	The purpose of the transaction. Values are <i>Original,Replace,Duplicate, Response,Re-Submission,Confirmation, and Mutually Defined.</i>
Transaction Type	The type or transcript or student record being sent. Values are <i>District or Postsecondary.</i>
Ref Nbr Qual (reference number qualifier)	A code identifying the type of student identification being sent in the Reference Number field. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Status Reason	The reason the transcript or student record is being sent. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Unit Type	The external unit type from the last SUM loop transmitted for the student indicating the type of credit used by the sending institution. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Reference Number	The reference information as defined by the reference identification qualifier field.

Cumulative	An indicator of whether or not the data on this page is a summary or all work included in the record. A <i>Y</i> in the field indicates the data is cumulative.
Course Level	The level of work that is reflected in the GPA and hours on this page. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Attempted	The total number of units the student attempted on this record as transmitted in the last SUM loop of the record.
External GPA (external grade point average)	The GPA for the student as transmitted in the last SUM loop of the record.
Class Rank	The class rank of the student as transmitted in the last SUM loop of the record.
Completed	The total number of units the student attempted and earned on this record as transmitted in the last SUM loop of the record
Hours Earned	The total number of hours included in the GPA for this summary as transmitted in the last SUM loop of the record.
Class Size	The total number of student in the class to help position the student's rank as transmitted in the last SUM loop of the record.
Name Component	The code identifying the type of name component. Refer to the Student Educational Record Transaction Set 130 (TS130) for a definition of the values.
Date Time Period	The date the class rank was determined.
Name	The free-form text of the name component or the full name as indicated in the name component field.

Reviewing EDI TS130 Messages in the Staging Table

Access the EDI TS130 Messages page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Messages).

EDI TS130 Academic Summary		EDI TS130 Courses		EDI TS130 Degrees		EDI TS130 Additional Info		EDI TS130 Messages	
Trans ID:	ADM_TRNS_TS130	Queue Inst:	1	In/Out:	Inbound				
Cntrl Num:	0901	Dt Loaded:	10/08/2004						
Last Name:	Harris	First Name:	Melissa	Middle Initial:	N				
Find View All First 1 of 2 Last									
Run Date/Time:	10/08/2004 2:26:18PM	Process Instance:	195						
User ID:	PS	Process Name:	ADTRNSRC						
Message Set Number:	14200	Message Number:	143						
Message Severity:	Message								
Message Text:	External Organization is new or an update or is a delete.								
Description:	See the comments below to verify.								
Comments:	The record has been determined to be a(n) UPDATE and the number of matches is 1.								

EDI TS130 Messages page

Any informational and error messages that the EDI TS130 load, organization search, search/match, or posting processes generates appear on this page. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your EDI processing. To do such an analysis, you would need to wait to purge your EDI messages until you have completed your analysis.

You can also look to these messages to ascertain any changes you want to make to your staging data before posting it to your database.

Run Date/Time	The day and time the last process ran for this record.
Process Instance	The process number of the last process run for this record.
User ID	The user ID of the person who ran the last process for this person.
Process Name	The name of the last SQR run for this record. For example, in the previous page example, the last SQR run was ADTRNPST.SQR (the load process).
Message Set Number and Message Number	The message set number and message number, which come from the message catalog.
Message Severity	The message severity (such as <i>Message</i> or <i>Error</i>).
Message Text	The actual message on this row of data.
Description	Details about the message in the Message Text area.
Comments	Results or other additional information about the message.

Using the Organization Search Process

This section provides an overview of the organization search process and lists the page used to run the Organization Search process.

After you have loaded the TS130 data and corrected any error resulting from the load process, run the organization search process to match the organization and course data.

When you click the Run button, the Organization Search process does the following: Uses the FICE, ATP, ACT, or IPEDS code found on the EDI TS130 Staging, EDI TS130 Org Data page to find a match to the same codes stored on the Organization Table, School Data page. If a match is found, the system populates the Ext Org ID, Term Type, and External Career fields on the EDI TS130 Org Data page.

The Term Type and External Career fields will only be populated if the system defaults for those fields are populated on the Organization Table, School Data page.

The system updates the EDI TS130 Courses page (Student Admissions, Application/Transcript Loads, TS130, TS130 Staging, EDI TS130 Courses) based on the search process. The system compares the EDI School Subject and EDI Course Number fields on the EDI TS130 Courses page with the school subject and school course number on the School Course Classification page (Campus Community, Organization, Create/Maintain Organizations, School Course Classification).

If the system finds a match, it sets the course to Course Post. If the system does not find a match, it sets the Crse Error (course error) flag for the course and also sets it on the EDI TS130 Staging, EDI TS130 Process Options page.

To post the course as it is, select the Course Post check box and save the page. If you post all of the courses for which no match was found, the Edit Process Option field on the EDI TS130 Process Options page automatically changes from *Error* to *Complete*. If you decide not to post one or more courses, you must manually change the Edit Process Option field to *Complete* in order for the transcript to be posted.

To rectify a course error:

1. Clear the Course Nbr (course number) field
2. Press TAB.
3. Click the prompt to select the appropriate course.

The system clears the Crse Error check box, but you must select Course Post to post the course. The appropriate courses do not appear if you do not press TAB before selecting the course number prompt. You must return to TS130 staging and correct the errors before posting the data.

Page Used to Run the Organization Search Process

Page Name	Definition Name	Navigation	Usage
EDI TS130 Org Search (organization search)	ADM_TS130_ORG_PARM	Student Admissions, Application/Transcript Loads, TS130, Organization Search Process	Run the process to match organization and course data from the transmitted student record.

Setting Up TS130 Search/Match/Post Parameters, and Processing and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the EDI TS130 data, and then you can run both processes at once: to search for matching people in your database and to post the external EDI TS130 data according to the parameters you set up. The EDI TS130 Post process contains logic to prevent the posting of duplicate data in the following areas: External data and external academic summary. The following fields are used to determine if a new row should be added to external data and external academic summary during the process: EmplID, External Organization ID, Career, Data Source, Transcript Type, Transcript Status, Academic Level, From Date, and To Date. If the session data on the EDI TS130 staging matches the data on the External Education page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). In this case, the existing data is updated with the new data. If the data does not match, a new row is added.

External degree: The following fields are used to determine if an external degree should be added during the process: EmplID, External Org ID, External Career, Data Source, Degree Status, Degree Date, and Degree. If the degree data on EDI TS130 staging matches the data on the Courses and Degrees page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. If the data does not match, a new row is added.

External courses. The following fields are used to determine if an external course should be added during the process: EmplID, External Org ID, Data Source, School Subject, Course Number, Begin Date and End Date, and Grade In. If the course data on EDI TS130 Staging matches the data on the Courses and Degrees page, a new row is not added. The exception to this logic is if the EDI Transaction Type (BGN01) equals Replace (05), Re-Submission (15), or Reissue (18). If the data matches and the transaction type is one of these values, the existing data is updated with the new data. Additionally, if the Grade In field on the Courses and Degrees page is blank and the remaining data matches, the Grade In field will be updated with the grade from EDI TS130 Staging. If the data does not match, a new row is added.

This section discusses how to:

- Set up search/match parameters.
- Post the EDI TS130 external data.
- Establish address types.

Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the EDI TS130 data to the database in one step.

Pages Used to Set Up TS130 Search/Match/Post Parameters, Process, and Post the EDI Staging Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Params	SEARCH_PARMS	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Search Params	Set up your search/match parameters for processing the EDI TS130 transcript staging table.
Post Parameters	ADM_TS130_PST_PARM	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm	Set up post parameters and to post EDI TS130 transcript data. You can post a single record or all records in the staging table.
Post Parameters	ADM_TS130_PST_PRM2	Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm 2	Set up your address type for the search/match process.

Setting Up Search/Match Parameters

Access the Search Params page (Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Search Params).

ADM TS130 Post Parm		ADM TS130 Post Parm 2		Search Parms	
Run Control ID: ED		Report Manager		Process Monitor Run	
*Search Parameter:		PSCS_TRADITIONAL		CS_Person_Traditional	
No Match Found					
	Add	Update	Suspend	Ignore	
New:	☒	☐	☐	☐	
Match(es) Found Find View All 1-2 of 5					
Order Nbr:	10	Name,Addr,City,Bday,Gender,SSN		*****Parameters Refreshed*****	
One Match:	☐	☒	☐	☐	
Multiple Matches:	☐	☐	☒	☐	
Order Nbr:	20	SSN Only			
One Match:	☐	☒	☐	☐	
Multiple Matches:	☐	☐	☒	☐	

Search Parms page

Note. The words *Parameters Refreshed* appear if this is the first time you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Matches Found

New

Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database.

Add: Add the unmatched record to your database, including personal data.

Suspend: Keep the unmatched record in the suspense file to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Order Nbr(order number)

For each order number, select what you want to do with the EDI record if the search/match/post process discovers one or more matching records.

- One Match and Multiple Matches**

Select whether you want to add, update, suspend, or ignore matching records.

Add: Add a new record to your database using the suspense record.

Update: Update the existing record with the data in the suspense record. Remember, the process does not update bio/demo data.

Suspend: Keep the suspense record back in the suspense table. You need to determine manually whether or not this record matches a record in your database.

Ignore: Ignore the suspense record that matched a record in your database. The process marks the record to be purged.

Posting the EDI TS130 External Data

Access the ADM TS130 Post Parm page (Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm).

ADM TS130 Post ParmADM TS130 Post Parm 2Search Parms

Run Control ID: EDReport ManagerProcess MonitorRun

Execution Option

☒ Search, Match and Post☐ Post Only☐ Search and Match Only

Post Processing Parameters

☐ Process Single Record

Data Source:School

Academic Institution:PSUNVPeopleSoft University

Grading Scheme:

Summary Type from External Career

Find | View AllFirst1 of 1Last

*External Career:

*Summary Type:

ADM TS130 Post Parm page

Execution Option

- Search, Match and Post**

Select this option if you want to perform the search/match and the post process at the same time. This option is recommended. The EDI TS130 Search/Match/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. After the process has performed the match, it posts the EDI TS130 external data to your database.

Post Only	Select this option if you only want to post the external data to your database.
Search and Match Only	Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update an existing person until you post the data.

Post Processing Parameters

Process Single Record	Select this option to process and post a single record. After you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.
Data Source	Select the data source that you want the process to assign to any transcript information that posts to your database. The default is <i>School</i> , but you can select a different value. Values for this field are delivered with your system as translate values. You can modify these translate values.
Academic Institution	Enter the academic institution to post with the academic summary and course data.
Grading Scheme	Enter the grading scheme to populate for each course on the Courses and Degrees page.

Summary Type from External Career

External Career and Summary Type	Cross-reference fields that work in conjunction with external academic summary data from incoming transcripts. These two fields enable the posting of External GPAs to students' external education records—external GPA is tied to summary type, which is a child of external career. External career data is loaded with the TS130 table. By defining desired summary types for each external career that has been loaded, the EDI TS130 Transcript Srch/Post process writes external career, summary type, and external GPA data to the external education record.

Click the Run button to run the EDI TS130 Transcript Srch/Post process at user-defined intervals.

Note. You can view the data in the EDI TS130 Staging pages at this time. To view the transcript data posted for a person, use the Education component.

Establishing Address Types

Access the EDI TS130 Post Parm 2 page (Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Post Parameters, ADM TS130 Post Parm 2).

ADM TS130 Post Parm

ADM TS130 Post Parm 2

Search Parms

Run Control ID: ED

[Report Manager](#) [Process Monitor](#)

Run

Address Search Usage

Find | View All First 1 of 1 Last

Address Usage Order

Address Type:

1

Home

+

-

ADM TS130 Post Parm 2 page

All of the addresses in EDI TS130 Staging post to the PeopleSoft tables. The Address Type chosen in the Address Search Usage hierarchy is used solely for search/match purposes.

Address Usage Order Indicates the usage order for the address type in the search process.

Address Type Select the address type to be used in the search process.

Purging the EDI TS130 Staging Table and Messages

This section discusses how to purge the EDI TS130 staging table and messages.

Page Used to Purge the EDI TS130 Staging Table and Messages

Page Name	Definition Name	Navigation	Usage
EDI TS130 Purge Parms (EDI TS130 purge parameters)	ADM_TS130_PUR_PARM	Student Admissions, Application/Transcript Loads, TS130, Purge Process	Purge records and messages, if applicable, from the EDI TS130 staging table.

Purging Staging Tables

Access the EDI TS130 Purge Parms page (Student Admissions, Application/Transcript Loads, TS130, Purge Process).

EDI TS130 Purge Parms

Run Control ID: TS130

[Report Manager](#)[Process Monitor](#)

Run

Purge Processing Parameter

☐ All Suspense Rows

☒ Marked Suspense Rows

Purge Option for Marked Rows

☐ All Marked Suspense Rows

☐ Rows Loaded before or on

☒ Rows Posted before or on

05/15/2008

Message Purge Parameter

☒ Retain Associated Messages

☐ Remove Associated Messages

EDI TS130 Purge Parms page

Purge Processing Parameter

- All Suspense Rows

Select this option to purge all records in your staging table, regardless of the posting status shown in the Post field of the Process Options and Org Process Options pages.
- Marked Suspense Rows

Select this option to purge only those records in your staging table marked *Purge* in the Post field of the Process Options and Org Process Options pages.

Purge Option for Marked Rows

This group box appears when you select the Marked Suspense Rows option.

- All Marked Suspense Rows

Select this option to purge all the records in your staging table that are marked *Purge* in the Post field of the Process Options and Org Process Options pages.

- Rows Loaded before or on** Select this option and enter a date to purge only those staging records that were loaded on or before the specified date and that are marked *Purge* in the Post field of the Process Options and Org Process Options pages.
- Use the Dt Loaded (date loaded) field on the EDI TS130 Process Options page to see when you loaded a record.
- Suppose you loaded transcripts on May 10, 2008. Subsequently, you loaded another set of transcripts on May 15, 2008. If you select the Rows Loaded before or on option and specify the date as May 15, 2008, the purge process deletes the transcript records marked *Purge* that were loaded on May 15, 2008, and May 10, 2008.
- Rows Posted before or on** Select this option and enter a date to indicate that you want to purge only those staging records that are marked *Purge* in the Post field of the Process Options and Org Process Options pages and that were posted on or before the specified date.
- Use the Dt Posted (date posted) field on the EDI TS130 Process Options page to see when you posted a record.
- Suppose you posted transcripts on May 10, 2008. Subsequently, you posted another set of transcripts on May 15, 2008. If you select the Rows Posted before or on option and specify the date as May 15, 2008, the purge process deletes the transcript records marked *Purge* that were posted on May 15, 2008, and May 10, 2008.

Message Purge Parameters

- Retain Associated Messages** Select this option if you do *not* want to purge messages associated with the files that you are purging.
- Remove Associated Messages** Select this option if you do want to purge messages associated with the files that you are purging.

Click the Run button to run the EDI TS130 Transcript Purge process at user-defined intervals.

Purging All EDI Messages

This section lists the page used to purge all EDI messages.

Page Used to Purge All EDI Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EDI Message Purge	EDI_TS_MSG_PURGE	Student Admissions, Application/Transcript Loads, EDI All Message Purge	Purge all EDI messages. You can run a process to purge all EDI messages in your staging files.

Chapter 19

Performing EDI TS189 Application Transactions

This chapter provides an overview of EDI TS189 application transactions and discusses how to:

- Set up ethnicity for EDI TS189 application transactions.
- Load the Electronic Data Interchange (EDI) data for application transactions.
- Review and edit the EDI TS189 staging pages.
- Search for matching organization data.
- Set up TS189 search/match/post parameters, and process and post the EDI staging files.
- Purge the EDI TS189 staging table and messages.

Understanding EDI TS189 Application Transactions

Recruiting and Admissions enables you to load applications through EDI (Electronic Data Interchange). This section discusses the steps involved in performing EDI TS189 application transactions.

To perform EDI TS189 application transactions:

1. Process the inbound EC agent.

Specify the location of the file that you want to load into the suspense file on the Schedule Inbound EC Agent page.

See [Chapter 18, "Performing EDI TS130 Transcript Transactions," Processing the Schedule Inbound EC Agent, page 274.](#)

2. Load the EDI data for application transactions.

Run the TS189 Load Application Process to load the data into staging files.

3. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field on the Process Options page.

4. Search for matching organization data.

After you have loaded the application (TS189) data into the staging files, run the Organization Search process. You must do the organization search as the TS189 load contains some organization data—course information associated with a particular organization—that must be identified to some record in the system.

5. After you have corrected all of the load errors in the suspense files, run the Search/Match/Post process.

This process looks for data in your database (based on search parameters that you define on the Search/match Parameters page, to include, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process does not post the record until you can manually determine which records are actually duplicates.

6. Access each suspense record that was not posted and check to see if it is actually a duplicate.

In the search dialog page of the TS189 Staging component, enter *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then, click the Search button. The search process finds only those suspense records that went through the search/match/post process but were not posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, and then use the search/match process to look up the biographic/demographic information that matches the suspense record and decide on your own whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the biographic/demographic information and test record to your database, update an existing record, or ignore the suspense record altogether.

7. Run the Search/Match/Post Process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a biographic/demographic record that the search/match/post process created, select Student Admissions, Application Maintenance, Add/Update a Person. To view a test score record that the search/match/post process created or updated, select Student Admissions, Application Entry, Academic Information, Test Results. To view the application created, select Student Admissions, Application Maintenance, Maintain Application.

8. Purge files.

Purge TS189 staging table records on the EDI TS189 Purge Parameters page. You can also purge messages in this process. If you want to perform an analysis on your EDI processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them at a later date when you know you no longer have a need to view them.

Note. Ensure that your system is set up to correctly populate ethnicity information during the TS189 posting process.

See [Chapter 19, "Performing EDI TS189 Application Transactions," Setting Up Ethnicity for EDI TS189 Application Transactions, page 317.](#)

See Also

[Chapter 18, "Performing EDI TS130 Transcript Transactions," Purging All EDI Messages, page 312](#)

[Chapter 13, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 155](#)

[Chapter 17, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 215](#)

Setting Up Ethnicity for EDI TS189 Application Transactions

This section provides an overview of ethnicity setup for EDI TS189 transactions and discusses how to set up ethnicity mapping.

Understanding Ethnicity Setup for EDI TS189 Transactions

You need to make sure that your system is set up to correctly populate ethnicity information during the TS189 posting processes.

In order to populate ethnicity and race information in the system to meet IPEDS requirements, you should complete ethnicity mapping on the IPEDS Ethnicity Mapping table rather than on the Conversion Data Profile. If collecting this data according to the IPEDS requirements is not necessary, then you may use the Conversion Data Profile.

Note. When IPEDS data is available, the system ignores any Ethnic Group field on the Bio/Demo page.

See Also

[Chapter 18, "Performing EDI TS130 Transcript Transactions," Setting Up Ethnicity in the System, page 273](#)

Page Used to Set Up Ethnicity for EDI TS189 Application Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TS189 IPEDS Ethnicity Mapping	SAD_T189_ETHNICITY	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, TS189 IPEDS Ethnicity Mapping	Define and track ethnicity codes to comply with U.S. Federal Integrated Postsecondary Education Data System (IPEDS) requirements.

Setting Up Ethnicity Mapping

Access the TS189 IPEDS Ethnicity Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, TS189 IPEDS Ethnicity Mapping).

TS189 IPEDS Ethnicity Mapping

Regulatory Region: USA

			Customize	Find		First	1-5 of 5	Last
	IPEDS Race/Ethnicity	Ethnic Group	Description					
1	T	AMIND	American Indian/Alaska Native	+	-			
2	U	ASIAN	Asian	+	-			
3	Q	BLACK	Black/African American	+	-			
4	R	HISPA	Hispanic/Latino	+	-			
5	V	PACIF	Native Hawaiian/Other Pacific Islander	+	-			

TS189 IPEDS Ethnicity Mapping page

The fields on this page map inbound data to the Ethnicity page in PeopleSoft Campus Community.

- Regulatory Region**

The IPEDS standards apply only to the U.S. region.
- IPEDS Race/Ethnicity**

Enter an ethnicity code. These codes are mandated by the AACRAO SPEEDE committee's recommendation for handling IPEDS requirements.
- Ethnic Group**

Select an ethnic group. These codes are set up on the Ethnic Groups page in PeopleSoft HRMS.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information," Entering Ethnicity Information

Loading the EDI Data for Application Transactions

This section discusses how to use the EDI TS189 Load Parm's (EDI TS189 load parameters) page to set up application load parameters and to load application data into staging tables.

Page Used to Load the EDI Data for Application Transactions

Page Name	Definition Name	Navigation	Usage
EDI TS189 Load Parm	ADM_TS189_LOD_PARM	Student Admissions, Application/Transcript Loads, TS189, Load Application Process, EDI TS189 Load Parm	Set up application load parameters and load application data into staging tables. After you process your Inbound EC Agent, define parameters on the EDI TS189 Load Parm page for the data you are loading. Then, run the process to load the data into the staging tables.

Loading Applications

Access the EDI TS189 Load Parm page (Student Admissions, Application/Transcript Loads, TS189, Load Application Process, EDI TS189 Load Parm).

Warning! You should complete the full loading, search/match and posting process before loading a new set of data. If you have data waiting to be processed, do not load a new file until you have processed any data already in your staging files.

EDI TS189 Load Parm

Run Control ID: TS189 [Report Manager](#) [Process Monitor](#) Run

'Regulatory Region:  United States

Name Prefix Parm

Male: 

Female: 

Unknown: 

EDI TS189 Load Parm page

Regulatory Region

The system uses the value entered here to populate ethnic group fields during TS189 staging.

Important! Ensure that the ethnic groups defined on the Conversion Data Profile page match those defined for the regulatory region entered here.

Male,Female, and Unknown An EDI load does not include a person's title. It does, however, include gender. In these fields, enter the title you want entered according to the gender provided in the EDI load. Values for this field are delivered with your system as translate values. You can modify these translate values.

Click the Run button to run the EDI TS189 Application Load/EDI process at user-defined intervals. The process uses the Last Admit Term field on the Academic Program Table and Academic Plan Table pages to validate academic programs and plans.

Note. You can view the data in the TS189 Staging pages at this time.

Reviewing and Editing the TS189 Staging Pages

You can use the TS189 Staging component to review or edit the application data loaded through the EDI transaction. If you have not run the posting process, any changes you make posts to your database when you run the posting process, which means that the data posts to the person's record (unless otherwise noted).

The TS189 application staging pages are holding tables and are not linked to your database. Personal, organization, and application data from these tables post to your database during the posting process, but the data is not shared. Therefore, if you change a value in one of these pages, your database is not affected until you run the posting process. Data from these records can post to personal data and to the Application Maintenance, Extracurricular Activities, Honors and Awards, Education, Work Experience, and Test Results components. If, during the posting process, the data causes a new record to be added, the person is added to your demographic data.

At any time during the TS189 application load process, you can access the TS189 Staging pages to review the information stored here. For example, you might want to look at the data immediately after loading it, after processing it, after posting it, or after each of those steps, depending on your procedures.

If you have not run the posting process, then you can edit the data in these pages before it posts to your database. That way the edited data posts to the person's record.

Note. Be careful when editing the data in your staging files before posting so that you do not inadvertently create duplicate records.

If you find an error in these pages *after* the posting process, you need to go to the proper page in your database to make any changes.

Note. Many of the TS189 Staging pages are similar to those with the same name in the TS130 Staging component. For these common pages, we provide an example of the TS189 page here, but refer you to the corresponding TS130 page section for a description of the fields since they are the same.

This section discusses how to review TS189:

- Staging bio/demo data.
- Staging address data.
- Staging communication data.
- Staging languages.

- Staging recommender data.
- Staging residence data.
- Staging reference numbers data.
- Staging application degree data.
- TS189 staging application entry/questions.
- Staging cumulative GPA data.
- Staging employment data.
- Staging immunizations data.
- Staging religion data.
- Staging activities data.

Pages Used to Review and Edit TS189 Staging Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Options	ADM_TS189_PROC_OPT	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Process Options	Review or edit the process options in your TS189 staging table. This page provides the status of an TS189 application record regarding the loading, search/match and posting processes. For example, you can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.
Org Process Options (organization process options)	ADM_TS189_ORG_OPT	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Org Process Options	Review or edit the process options for external organization records in your TS189 staging table.
Bio/Demo (biographic/demographic)	ADM_TS189_BIODEMO1	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Bio/Demo	Review and edit the biographical and demographic data loaded through the TS189 load application process.

Page Name	Definition Name	Navigation	Usage
Bio/Demo 2 (biographic/demographic 2)	ADM_TS189_BIODEMO2	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Bio/Demo 2	Review and edit the biographical and demographic data loaded through the TS189 load application process.
Names	ADM_TS189_NAM	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Names	View name component information for the application loaded through the TS189 load application process.
Address	ADM_TS189_ADR	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Address	View additional address information loaded through the TS189 load application process.
Organization Detail	ADM_TS189_ADR_SEC	Click the Organization Detail link on the Address page.	View actual address information.
Communications	ADM_TS189_COM	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Communications	View details about TS189 communication data loaded through the TS189 load application process.
Languages	ADM_TS189_LANG	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Languages	View information about an applicant's language use and proficiency loaded through the TS189 load application process.
Recommenders	ADM_TS189_REC	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Recommenders	View information about individuals who recommended the applicant.
Address	ADM_TS189_REC_SEC	Click the Address link on the Recommenders page.	View address information for a recommender.
Residences	ADM_TS189_RES	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Residences	View residence data for the applicant and other related people.
Test Scores	ADM_TS189_TESTS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Test Scores	Review or edit test score data loaded through the TS189 load application process.

Page Name	Definition Name	Navigation	Usage
Ref Nmbrs (reference numbers)	ADM_TS189_REF	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Ref Nmbrs	View reference number information loaded through the TS189 load application process.
App Degree (application degree)	ADM_TS189_DEG	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Degree	Review or edit applicant degree data loaded through the TS189 load application process. Degree information falls under a session.
Application Data	ADM_T189_DEG_EC	Click the Application Data link on the Application Degree page.	View details about an applicant's academic background.
App Entry/Qstns (application entry/questions)	ADM_TS189_SSE	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Entry/Qstns	View information about additional application questions and answers, if provided.
Org Data (organization data)	ADM_TS189_ORG_DEMO	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Org Data	Review and edit the organization demographic data loaded through the TS189 load application process. Organization data does <i>not</i> post to your database. The organization data from the TS189 application load is matched with an organization in your database. Then, the matching ID is inserted on this page and carried over to the subsequent pages in this component, which contain application data about this organization. The system also uses the matching organization to populate organization information in the Education component.
Sessions	ADM_TS189_SES	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Sessions	Review or edit transcript session data loaded through the TS189 load application process.
Acad Status (academic status)	ACAD_TS189_SST	Student Admissions, Application/Transcript Loads, TS189, TS189 Acad Status	Review or edit high school academic status data loaded through the TS189 load application process.

Page Name	Definition Name	Navigation	Usage
Cum GPA (cumulative grade point average)	ADM_TS189_SST2	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Cum GPA	Review or edit applicant cumulative GPA data loaded through the TS189 load application process. GPA information is under a session.
Courses	ADM_TS189_CRS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Courses	Review or edit applicant course data loaded through the TS189 load application process. Course information is under a session.
Employment	ADM_TS189_EMPLOY	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Employment	Review or edit applicant employment data loaded through the TS189 load application process. Employment information is under a session
Immunizations	ADM_TS189_IMMUNIZ	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Immunizations	Review or edit applicant immunizations data loaded through the TS189 load application process.
Religion	ADM_TS189_RELIGION	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Religion	Review or edit applicant religion data loaded through the TS189 load application process.
Activities	ADM_TS189_ACTIVITY	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Activities	Review or edit applicant activities data loaded through the TS189 load application process.
Messages	ADM_TS189_MSGS	Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Messages	View EDI TS189 processing messages.

Reviewing EDI TS189 Staging Bio/Demo Data

Access the Bio/Demo page (Student Admissions, Application/ Transcript Loads, TS189, TS189 Staging, Bio/Demo).

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound
Cntrl Num:	992040991	Dt Loaded:	09/18/2009		
Last Name:	Shoeman	First Name:	Paulie	Middle Name:	ALBERT
Bio/Demo Data Find View All First 1 of 3 Last					
Relationship Nbr:	1	*Relation:	Self		
Last Name:	Shoeman				
First Name:	Paulie		Middle Name:	ALBERT	
ID:					
Ref Nbr Qual:	SSN	Ref Nbr:	111111111		
SSN:	455-34-5612		Date of Birth:	02/02/1959	
Name Prefix:	Mr	☒ Age 18 or Older	Age:		
*Gender:	Male	*Marital Status:	Single		
*Regulatory Region:	United States	Hi Educ Lv:	Not Indic		
Ethnic Group:	Afr Amer				
IPEDS Ethnicity and Race Data					
IPEDS Ethnicity Response:	R	Ethnic Group:	HISPA	Hispanic/Latino	
IPEDS Race Response 1:	Q	Ethnic Group:	BLACK	Black/African American	
IPEDS Race Response 2:	S	Ethnic Group:	WHITE	White	
IPEDS Race Response 3:	T	Ethnic Group:	AMIND	American Indian/Alaska Native	
IPEDS Race Response 4:	U	Ethnic Group:	ASIAN	Asian	
IPEDS Race Response 5:	V	Ethnic Group:	PACIF	Native Hawaiian/Other Pacific Islander	

Bio/Demo page

This page contains biographical and demographic data for the person from the EDI TS189 application load.

IPEDS Ethnicity and Race Data

The data that appears in this group box is populated by the system from the IPEDS Ethnicity Mapping table. The display-only values of R, Q, S, etc. represent the inbound data values; select the Campus Solutions equivalent values in the Ethnic Group field.

The TS189 post process uses these CS-mapped values to populate the ethnicity pages and records on various Campus Solutions transaction components

Reviewing TS189 Staging Address Data

Access the Address page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Address).

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address	Communications
Trans ID: ADM_TRNS_TS189 Queue Inst: 1 In/Out: Inbound Cntrl Num: 992040991 Dt Loaded: 10/01/2004 Last Name: Shoeman First Name: Paulie Middle Initial: A						
Bio/Demo Data Find View All First 1 of 3 Last						
Relationship Nbr: 1 Relation: Self Last Name: Shoeman First Name: Paulie MI: A						
Address Components Find View All First 1 of 2 Last						
*Address Type: Home Location ID:						
Dt 1 Qual: Date 1:						
Dt 2 Qual: Date 2: Organization Detail						

TS189 Staging - Address page

Dt 1 Qual (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier) Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.

Organization Detail Click this link to view or edit address information. The Address Detail page appears.

Reviewing TS189 Staging Communication Data

Access the Communications page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Communications).

Process Options	Org Process Options	Bio/Demo	Bio/Demo 2	Names	Address	Communications
Trans ID: ADM_TRNS_TS189 Queue Inst: 1 In/Out: Inbound Cntrl Num: 992040991 Dt Loaded: 10/01/2004 Last Name: Shoeman First Name: Paulie Middle Initial: A						
Bio/Demo Data Find View All First 1 of 3 Last						
Relationship Nbr: 1 Relation: Self Last Name: Shoeman First Name: Paulie MI: A						
Communications Components Find View All First 1-3 of 3 Last						
Comm Type	Comm Nbr	Dt 1 Qual	Date 1	Dt 2 Qual	Date 2	
E-Mail Work	PSHOEMAN@HOTMA					
Home	2818935050	Start Dt	01/01/1999	Expir Dt	02/15/2000	
Other	2812511341					

TS189 Staging - Communications page

DT 1 Qual (date 1 qualifier)	Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
Dt 2 Qual (date 2 qualifier)	

Reviewing TS189 Staging Languages

Access the Languages page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Languages).

Communications Languages Recommenders Residences Test Scores Ref Nmbrs App Degree			
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1
Cntrl Num:	992040991	Dt Loaded:	10/01/2004
Last Name:	Shoeman	First Name:	Paulie
		Middle Initial:	A
Bio/Demo Data Find View All First 1 of 3 Last			
Relationship Nbr:	1	Relation:	Self
Last Name:	Shoeman	First Name:	Paulie
		MI:	A
Language Use Find View All First 1 of 1 Last			
SeqNum:	1		
ID Code Qual:	Lang Cd	ID Code:	EN
Description:	English In The Home		
Lang Use:	Home		
Lang Proficny:	Englsh Prof		

TS189 Staging - Languages page

ID Code Qual (ID code qualifier)	Indicates which set of language codes is being sent. Values are <i>Lang Cd</i> (language code) and <i>Mutually</i> .

ID Code A code that identifies the language (such as *KO* for Korean).

Reviewing TS189 Staging Recommender Data

Access the Recommenders page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Recommenders).

Communications Languages Recommenders Residences Test Scores Ref Nmbrs App Degree					
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound
Cntrl Num:	992040991	Dt Loaded:	10/01/2004		
Last Name:	Shoeman	First Name:	Paulie	Middle Initial:	A

Recommender Information		Find View All	First 1 of 3 Last
*SeqNum:	1	Rcmd Type:	Employer
Name:	Joseph Stoudamire	Dt Record:	06/15/1999 Address
Title:	Manager		
Recommendation Type:	Manager		
Length Known Quant Qualifier:	DY	Length Known:	
Comm Qual 1:	AP	Communication Number 1:	
Comm Qual 2:		Communication Number 2:	
Business Name:		ID Code:	

TS189 Staging - Recommenders page

SeqNum (sequence number)	The sequential number of this row of data. The first data item (or row) loaded is 1. The next row is 2, and so on.
Rcmd Type (recommendation type)	The recommendation type that the system posts to the General Materials component.
Dt Record (date record)	The date of the recommendation.
Recommendation Type	The free-form name or mutually defined indicator for the type of recommendation being supplied when there is a need to distinguish types of recommendations. Types might include counselor evaluation, faculty evaluation, and supervisor recommendation.
Length Known Quant Qualifier (length known quantity qualifier)	Codes that identify the format of the Length Known field. Values are <i>DY</i> (days), <i>MN</i> (months), and <i>YY</i> (years).
Length Known	The amount of time the recommender has known the applicant. The code in the Length Known Quant Qual field defines the format of the number in this field. For example, if Length Known contains the value 78 and the Length Known Quant Qual field contains <i>DY</i> , then the recommender has known the applicant for 78 days.
Comm Qual 1 and Comm Qual 2 (communication qualifier 1 and communication qualifier 2)	Codes identifying the type of communication number that appears in the Communication Number 1 and Communication Number 2 fields. Values are:

Code	Name
AP	Alternate Telephone
AS	Answering Service
BN	Beeper Number
CP	Cellular Phone
EM	Electronic Mail
FX	Facsimile
HP	Home Phone Number
NP	Night Telephone
PC	Personal Cellular
TE	Telephone
WC	Work Cellular
WF	Work Facsimile Number
WP	Work Phone Number

Communication Number 1 The complete communication number, including country or area code
and Communication Number (when applicable).
2

ID Code Identification of an organizational entity.

Address Click to access the Address Detail page and view address information for this recommender.

Reviewing TS189 Staging Residence Data

Access the Residences page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Residences).

CommunicationsLanguagesRecommendersResidencesTest ScoresRef NmbrsApp Degree

Trans ID:ADM_TRNS_TS189Queue Inst:1In/Out:Inbound

Cntrl Num:992040991Dt Loaded:10/01/2004

Last Name:ShoemanFirst Name:PaulieMiddle Initial:A

FindView AllFirst1 of 1Last

*Industry Code:Pur Prpty

Relation Code:Father

Location Qual:

Location ID:

Dt 1 Qual:Start DtDate 1:06/01/1997

Quantity Qual:MonthsQuantity:24

Country:USAUnited States

State:TXTexas

Postal Code:

TS189 Staging - Residences page

Industry Code	Indicates a particular criteria or test for determining residency.
Relation Code	Indicates the relationship to the student of the individual to which this residency test or criteria applies. Examples include but are not limited to: 01 (spouse), 03 (parent), 26 (guardian), 32 (mother), and 33 (father).
Location Qual (location qualifier)	Code identifying the type of location.
Location ID	Code identifying a specific location.
Dt 1 Qual (date 1 qualifier)	Identifies what the date in the Date 1 field represents. For example, the date could represent the start date, the end date, or the expiration date.
Date 1	The date that the Dt 1 Qual field identifies.
Quantity Qual (quantity qualifier)	Identifies what the value in the Quantity field represents. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are: Days, Weeks, Months, and Years.
Quantity	The days, weeks, months, or years—as specified in the Quantity Qual field—that this person lived with this relation.

Reviewing TS189 Staging Reference Numbers Data

Access the Ref Nmbrs (reference numbers) page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Ref Nmbrs).

CommunicationsLanguagesRecommendersResidencesTest ScoresRef NmbrsApp Degree

Trans ID:ADM_TRNS_TS189Queue Inst:1In/Out:Inbound

Cntrl Num:992040991Dt Loaded:10/01/2004

Last Name:ShoemanFirst Name:PaulieMiddle Initial:A

Find | View AllFirst1 of 1Last

Ref ID Qual:SSN*Ref ID:111111111

Description:STUDENT REPORTED SSN

Location Qual:(Invalid ValueLocation ID:Regis

Dt 1 Qual:Date 1:

Dt 2 Qual:Date 2:

City:HollywoodState:CA

Postal Code:Country:USA

Entity ID:PostsecdName:Charles Tupper

TS189 Staging - Ref Nmbrs page

- Ref ID Qual** (reference ID qualifier)

A code identifying what the reference ID represents. Examples of reference ID qualifiers include but are not limited to: SSN (Social Security number), state ID, PIN (personal identification number), and visa number.
- Ref ID** (reference ID)

The Ref ID Qual field defines this number. For example, if the reference ID qualifier is SSN, then the reference ID number is the person's Social Security number.
- Location Qualifier**

A code identifying the type of location.
- Location ID**

A code identifying a specific location.
- Dt 1 Qual** (date 1 qualifier) and **Dt 2 Qual** (date 2 qualifier)

Identifies what the dates in the Date 1 and Date 2 fields represent. For example, the dates could represent the start date, the end date, or the expiration date.
- Entity ID**

The type of entity to which this name and location applies (for example, school, city, or county).

Reviewing TS189 Staging Application Degree Data

Access the App Degree (application degree) page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Degree).

Communications Languages Recommenders Residences Test Scores Ref Nmbrs App Degree			
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1
Cntrl Num:	992040991	Dt Loaded:	10/01/2004
Last Name:	Shoeman	First Name:	Paulie
		Middle Initial:	A
Find View All First 1 of 1 Last			
SSE Nbr:	1	Entry Date:	01/01/2000
☐ Application Error			
Find View All First 1 of 2 Last			
Degree Nbr:	1	Degree Date:	31
Degree:	BA	Description:	Bachelor of Business Administr
Honors Category:	None	Degree Status:	
External Career:	Undergrad		
Field of Study			
Find View All First 1 of 2 Last			
SeqNum:	1	FOS Level:	Major
Field of Study 1:	50.07.01	ID Code Qual:	CIP
Descr 1:	Marketing - Pre Bus	☐ Application Error Application Data	

TS189 Staging - App Degree page

ID Code Qual (ID code qualifier)

Identifies what the field of study represents. *Mutually* means that the value in the Field of Study 1 field is mutually defined.

Application Data

Click this link to view additional application data. The Application Data page appears.

Note. Admissions application records use the value of the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Note. You can view the transcript data posted for a person through the Education component or through the Education Summary inquiry component.

Reviewing TS189 Staging Application Entry/Questions

Access the App Entry/Qstns (application entry/questions) page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, App Entry/Qstns).

Ref Nmbrs		App Degree		App Entry/Qstns		Org Data		Sessions		Acad Status		Cum GPA		Courses	
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound										
Cntrl Num:	992040991	Dt Loaded:	10/01/2004												
Last Name:	Shoeman	First Name:	Paulie	Middle Initial:	A										
Application Entry															
Find View All First 1 of 1 Last															
SSE Nbr:	1	Priority:		☐ Application Error											
Entry Date:	01/01/2000	Exit Date:													
Status Reasn Cd:															
Application Questions															
Find View All First 1 of 7 Last															
SeqNum:	1														
Code Lst Qual:	App Q Qual														
Appl Q ID Code:	Free form question	Yes/No:	No												
Descr1:	MINI OR SHORT TERM														
Descr2:															

TS189 Staging - App Entry/Qstns page

Priority	A number that indicates the priority of choice for an intended entry into a school, school program, or postsecondary institution.
Application Error	Indicates whether or not there was an error when loading this application data. (display-only)
Entered Date	The applicant's desired entry date.
Exit Date	The applicant's desired exit date.
Status Reasn Cd (status reason code)	A code identifying a reason for the applicant's status, such as dropout or graduated.
Code Lst Qual (code list qualifier)	A code identifying a specific industry code list. For example, <i>App Q Qual</i> (application question identifier) and <i>Mutually Defined</i> .
Appl Q ID Code (application question identifier code)	A code identifying the type of question that was asked.
Yes/No	Indicates whether the applicant answered the question yes or no. The possible values are <i>N</i> (no), <i>U</i> (unknown), <i>W</i> (not applicable), and <i>Y</i> (yes).
Descr 1 (description 1)	A free-form question or indicator for a mutually defined question when the codified questions are not adequate.
Descr 2 (description 2)	The free-form or fill-in-the-blank response to a question when a response is needed. Some questions require that an explanatory note accompany an answer; for example, the question "Have you ever been convicted of a crime?" may require further explanation.

Reviewing TS189 Staging Cumulative GPA Data

Access the Cum GPA (cumulative grade point average) page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Cum GPA).

Ref NmbrsApp DegreeApp Entry/QstnsOrg DataSessionsAcad StatusCum GPACourses

Trans ID:ADM_TRNS_TS189Queue Inst:1In/Out:Inbound

Cntrl Num:992040991Dt Loaded:10/01/2004

Last Name:ShoemanFirst Name:PaulieMiddle Initial:A

FindView AllFirst1 of 4Last

SeqNum:1Descr:Cottonwood High School

FindView AllFirst1 of 1Last

Unit Type:SemesterCourse Level:Senior

Total Units Attempted:30Total Completed Units:30

Acad Hrs Attmptd:30Quality Points:

Excessive GPA Flag:External GPA:3.5

Sum Data Source:Cumulative

TS189 Staging - Cum GPA page

Acad Hrs Attmptd (academic hours attempted)	The number of academic hours the person attempted.
Quality Points	The quality points used to compute the person's GPA.
Excessive GPA Flag	Indicates that an A+ grade has a value higher than the highest possible GPA.
Sum Data Source (summary data source)	A code used to indicate the source of the summary data. Values are A (self-reported) and D (college transcript).
Cum Summary (cumulative summary)	Indicates whether the summary is cumulative.

Reviewing TS189 Staging Employment Data

Access the Employment page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Employment).

Acad Status Cum GPA Courses Employment Immunizations Religion Activities Messages			
Trans ID:	ADM_TRNS_TS189	Queue Inst:	1
Cntrl Num:	992040991	Dt Loaded:	10/01/2004
Last Name:	Shoeman	First Name:	Paulie
		Middle Initial:	A
Employer Find View All First 1 of 1 Last			
SeqNum:			
Employer Name:	Steveston Fishing Co. Address		
Description:	Seafood Importers		
Emp Code:	Employer	Emp Loc Qual:	Curr Addr
Position Find View All First 1 of 1 Last			
Description:	Dock Worker		
Date 1:	01/01/1994	Format:	CM
		Type:	Start Dt
Date 2:	12/31/1999	Format:	CM
		Type:	(Invalid Val

TS189 Staging - Employment page

The Employer

Emp Code (employer code)

The employer code. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Employer* and *Mutually*.

Emp Loc Qual (employer location qualifier)

Defines the address type: for example, home address, current address, local address.

Position

Date 1 and Date 2

The dates that the action in the Type field occurred. In the example in the preceding page shot, the start date of the position was January 1, 2000.

Format

Defines the units in which the date is defined. For example, if the date is set at *CCYYMM*, then data represented as 01/01/2000 would be transmitted as 000101: century, year, month.

Type

Specifies whether the date represents the starting date or the ending date.

Address

Click to access the Address Detail page and view address information for this employer.

Reviewing TS189 Staging Immunizations Data

Access the Immunizations page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Immunizations).

Acad Status	Cum GPA	Courses	Employment	Immunizations	Religion	Activities	Messages

Trans ID:	ADM_TRNS_TS189	Queue Inst:	1	In/Out:	Inbound
Cntrl Num:	992040991	Dt Loaded:	10/01/2004		
Last Name:	Shoeman	First Name:	Paulie	Middle Initial:	A

Immunizations		Find View All	First 1 of 1 Last
SeqNum:	1		
Immunization Date(s):			
Immunization Code:	EbolaCC04/06/2000		
Immunization Status Code:	9th Innocu		
Immunization Type Code:	Cntry Rec		
Identification Code Qual:	Imm Inj Cd		
Date/Time Period Qualifier:			

TS189 Staging - Immunizations page

Note. Immunization data does not post to the PeopleSoft Immunization table.

Immunization Date(s) The date or dates that the immunization occurred.

Immunization Code The type of immunization a person received. The following table contains possible codes defined by the Postsecondary Electronic Standards Council. Some possible codes are:

<i>Immunization Code</i>	<i>Description</i>
V03.2	Vaccine for Tuberculosis
V03.6	Vaccine for Pertussis
V03.7	Tetanus Toxoid Inoculation
V04.01	Polio Oral
V04.02	Polio Immunization
V04.1	Vaccine for Smallpox
V04.2	Vaccine for Measles

<i>Immunization Code</i>	<i>Description</i>
V04.3	Vaccine for Rubella
V04.6	Vaccine for Mumps
V04.8	Vaccine for Influenza
V06.1	Vaccine for DTP
V06.12	TD

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Immunization Status Code Indicates the status of an immunization conducted on a person. Possible codes are:

<i>Code</i>	<i>Name</i>
1	First Inoculation
2	Second Inoculation
3	Third Inoculation
4	Fourth Inoculation
5	Fifth Inoculation
6	Sixth Inoculation
7	Seventh Inoculation
8	Eighth Inoculation
9	Ninth Inoculation
10	Medical Exemption

Code	Name
11	Personal Exemption
12	Religious Exemption
13	Had the Disease
14	Has Not Had the Disease

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Immunization Type Code Indicates the title or contents of a document, report, or supporting item. Some possible codes are:

Code	Description
CQ	County Record
HR	Health Clinic Records
IR	State School Immunization Records
MG	Migrant Student Records Transfer System (MSRTS) Record
PY	Physician's Report
ZZ	Mutually Defined

This list is not comprehensive. For a comprehensive list, see the Postsecondary Electronic Standards Council website.

Identification Code Qual (identification code qualifier) Identifies a specific industry code list, such as AAW (Immunization Injection Code).

Date/Time Period Qualifier Defines the units in which the Immunization Date(s) field is defined. For example, if the Date/Time Period Qualifier field is set at MMDDCCYY, then data represented as 04/06/2000 would be transmitted as 04062000.

Reviewing TS189 Staging Religion Data

Access the Religion page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Religion).

Acad Status

Cum GPA

Courses

Employment

Immunizations

Religion

Activities

Messages

Trans ID:ADM_TRNS_TS189

Queue Inst:1

In/Out:Inbound

Cntrl Num:992040991

Dt Loaded:10/01/2004

Last Name:Shoeman

First Name:Paulie

Middle Initial:A

Religious Affiliation

Find | View All

First1 of 1Last

SeqNum:1

Religious Code:Catholic

Description:Christian

Identification Code Qual:Rel Cd

TS189 Staging - Religion page

Identification Code Qual Identifies a specific industry code list, such as *REL Cd* (religion code).

Note. Religion data does not post to the PeopleSoft Religious Preferences table.

Reviewing TS189 Staging Activities Data

Access the Activities page (Student Admissions, Application/Transcript Loads, TS189, TS189 Staging, Activities).

Acad Status

Cum GPA

Courses

Employment

Immunizations

Religion

Activities

Messages

Trans ID:ADM_TRNS_TS189

Queue Inst:1

In/Out:Inbound

Cntrl Num:992040991

Dt Loaded:10/01/2004

Last Name:Shoeman

First Name:Paulie

Middle Initial:A

Activities

Find | View All

First1 of 2Last

Qualifier Code:

Award Cd

Activity/Award Code:

AWARD

Description 1:

Hobie Meyer Athletic Award

Description 2:

Athletic Award

Time In Activity:

5

Activity Unit:

Years

TS189 Staging - Activities page

Qualifier Code Identifies a specific industry code list, such as *Award Cd* (award code).

Searching for Matching Organization Data

After you have loaded the application data into the staging files, you perform an organization search step. You must do the organization search because the TS189 load contains organization data—course information associated with a particular organization—that must be related to some record in your database.

This section discusses how to use the EDI TS189 Organization Search page.

Page Used to Search for Matching Organization Data

Page Name	Definition Name	Navigation	Usage
EDI TS189 Org Search (EDI TS189 organization search)	ADM_TS189_ORG_PARM	Student Admissions, Application/Transcript Loads, TS189, Organization Search Process	Perform the organization search.

Using the EDI TS189 Organization Search Page

Access the EDI TS189 Org Search page (Student Admissions, Application/Transcript Loads, TS189, Organization Search Process).

Click the Run button to run the EDI TS189 App Org Search process at user-defined intervals.

Setting Up TS189 Search/Match/Post Parameters, and Processing and Posting the EDI Staging Files

After you have reviewed the staging tables, specify on the Search/Match Parameters page which EDI data to load into your database as new records, which data to append to existing records in your database, and which data to ignore. After choosing your search/match parameters, you can also set up the parameters for posting the TS189 data and then you can run both processes at once: to search for matching people in your database and to post the external TS189 data according to the parameters you set up.

Note. The recommended option is to select the Search, Match, and Post option to search for matching people in your database and post the TS189 data to the database in one step.

To set up TS189 search/match/post parameters, and to process and post the staging files:

- Set up the EDI TS189 search/match parameters.
- Set up post parameters for EDI TS189 external data.
- Set up additional post parameters for TS189 external data.

Pages Used to Set Up TS189 Search/Match/Post Parameters, and to Process and Post EDI Staging Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Post Parameters	ADM_TS189_PST_PARM	Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Post Parameters	Post TS189 application data. You can post a single record or all records in the staging table.
Post Parameters 2	ADM_TS189_PST_PRM2	Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Post Parameters 2	Enter additional run control defaults, such as contact type, external career, summary type, and material group information.

Setting Up the EDI TS189 Search/Match Parameters

Access the Search/Match Parameters page (Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Search/Match Parameters).

Set up your search/match parameters for processing the EDI TS189 application staging table.

See Also

Chapter 18, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 306

Setting Up Post Parameters for EDI TS189 External Data

Access the Post Parameters page (Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process).

Post Parameters

Post Parameters 2

Search/Match Parameters

Run Control ID: 11Sept2009run

[Report Manager](#)

[Process Monitor](#)

Run

Search/Match/Post Exec Options

☒ Search, Match and Post

☐ Post Only

☐ Search and Match Only

TS189 Post Processing Parms

☐ Process Single Record

Data Source: School

Update IPEDS Ethnicity Flag

☐ For All Person Records Posted

☒ For New Person Records Added

Post Parameters page

Search/Match/Post Exec Options

- Search, Match, and Post

Select this option if you want to perform the search/match and the post process at the same time. This is the recommended option. The EDI TS189 Search/Match/Post process looks for matching data in your database. You can define search/match parameters that tell the process what to do in the case that it finds a match. After the process has performed the match, it posts the EDI TS189 external data to your database.
- Post Only

Select this option if you only want to post the external data to your database.
- Search and Match Only

Select this option to only run the search and match process on the suspense table. Note that the process only flags the data, according to the parameters you set up, which tells the posting process to create a new person, update an existing person, or ignore the incoming data. However, the process does not create a new person or update an existing person until you post the data.

TS189 Post Processing Params

Process Single Record	Select this option to process and post a single record. After you select this, select the appropriate record you want to post. If you prefer to process the entire staging table, do not select this option.
Data Source	Select the data source that you want the process to assign to any transcript information that posts to your database. The default is <i>School</i> . You can select a different value. Values for this field are delivered with your system as translate values. You can modify these translate values.

Update IPEDS Ethnicity Flag

For New Person Records Added	Select this option to instruct the TS189 Post program to check the IPEDS flag for each row on the Ethnicity page in Campus Community only for new person records added to the system.
For All Person Records Posted	Select this option to instruct the TS189 Post program to check the IPEDS flag for each row on the Ethnicity page in Campus Community for both new and updated EMPLIDs.

See Also

Chapter 18, "Performing EDI TS130 Transcript Transactions," Posting the EDI TS130 External Data, page 308

Setting Up Additional Post Parameters for EDI TS189 External Data

Access the Post Parameters 2 page (Student Admissions, Application/Transcript Loads, TS189, Search/Match/Post Process, Post Parameters 2).

Post Parameters

Post Parameters 2

Search/Match Parameters

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

Org Contact Type

Contact Type:

GCS

Summary Type from External Career

Find | View All

First 1 of 1 Last

*External Career:

*Summary Type:

High Schl

HSOV

High School Overall

Recommendation Material Group and Type from Academic Career

Find | View All

First 1 of 1 Last

*Institution:

*Academic Career:

*Material Group:

*Matl Type:

PSUNV

Undergrad

UGPORTFL

POR

UG Prtfls

Portfolio

Post Parameters 2 page

- Contact Type

Select the contact type to enable the posting of new organization and organization contact information that is loaded with the TS189 file.
- External Career and Summary Type

These are cross reference fields that work in conjunction with external academic summary data from incoming applications. The two fields enable the posting of external GPAs to students' external education records (external GPA is tied to summary type, which is a child of external career). External career data is loaded with the TS189 file. By defining desired summary types for each external career that has been loaded, the TS189 PeopleSearch/Post process writes external career, summary type, and external GPA data to the external education record.
- Institution, Academic Career, Material Group, and Matl Type (material type)

These fields enable the posting of recommendation material group information. Select material groups that represent recommendations and the recommendation material type. Recommendation material group information gets posted to the general materials page. Define material groups on the Material Group Table page.

Purging the TS189 Staging Table and Messages

This section discusses how to use the EDI TS189 Purge Parm (EDI TS189 purge parameters) page to purge records and messages, if applicable, from the EDI TS189 staging table.

Page Used to Purge the EDI TS189 Staging Table and Messages

Page Name	Definition Name	Navigation	Usage
EDI TS189 Purge Parm (EDI TS189 purge parameters)	ADM_TS189_PUR_PARM	Student Admissions, Application/Transcript Loads, TS189, Purge Process	Purge records and messages, if applicable, from the TS189 staging table.

Purging the EDI TS189 Staging Table and Messages

Access the EDI TS189 Purge Parm page (Student Admissions, Application/Transcript Loads, TS189, Purge Process).

EDI TS189 Purge Parm

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

TS189 Purge Processing Parm

☐ All Suspense Rows
☒ Marked Suspense Rows

TS189 Msg Purge Process Parm

☒ Retain Associated Messages
☐ Remove Associated Messages

EDI TS189 Purge Parm page

TS189 Purge Processing Parm

All Suspense Rows Select this option if you want to purge all records in your staging table, regardless of what is in the Post field on the Process Options and Org Process Options pages.

Marked Test Suspense Rows Select this option if you want to purge only those records in your staging table marked *Purge* in the Post field on the Process Options and Org Process Options pages.

TS189 Msg Purge Process Parm

Retain Associated Messages Select this option if you do not want to purge messages associated with the files that you are purging.

Remove Associated Messages Select this option if you want to purge messages associated with the files that you are purging.

Click the Run button to run the EDI TS189 Application Purge process at user-defined intervals.

Chapter 20

Processing External Test Scores

This chapter provides an overview of external test score data processing and discusses how to:

- Load external test score files.
- Correct and edit data in the suspense record.
- Perform search/match and post external data.
- Enter optional criteria for creating prospects.
- Research duplicate records.
- Rerun the search/match/post process.
- Purge suspense files and test score messages.
- Review test score candidate data.
- View test score messages summary information.

Understanding External Test Score Data Processing

The ability to receive external test score data and post it to your database is integral to recruiting and evaluating applicants. Academic institutions receive hundreds, if not thousands, of test scores each year. Using your Recruiting and Admissions application, you can receive external test score data, review the data for errors, and post the data, confident that you are not creating duplicate IDs. You can also post test score data to PeopleSoft CRM and have the post process create prospect records directly in CRM.

Recruiting and Admissions supports loading many test scores, such as the ACT, ADA, AMCAS, AP, CRS, DAT, EOS, GMAT, GRE, LSAT/LSDAS, SAT, SSS and TOEFL. The ultimate goal in processing external test score data is to update test score data for individuals through electronic data loads. Your institution receives tapes that contain scores, bio/demo, and sometimes transcript data for individuals. For each test, you first load the data into suspense tables. Then, you ensure that you are not going to create any duplicate bio/demo or test records. (It's very hard to identify and correct duplicate records after they've been created.) Finally, you post the bio/demo and test score data to your database. (The search/match/post process posts self-reported academic information to test score candidate data tables.) You follow this process for each test.

Regardless of the test, the same components are used to load, view, and post test score data. The ID of the test that you are processing must be entered on each component. The entry of the test ID determines which fields appear on each page. The test IDs shown in the prompt are based on your test ID security. You must have test ID security defined in order to process external test scores.

To process external test score data:

1. Load the test score data from a file in your directory into a suspense table using the External Test Score Load Application Engine (SAD_TST_LOAD) process.
2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter the test ID, *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field on the Test Score Suspense Data page.

3. After you have corrected all of the load errors, run the Search/Match/Post Test Scores Application Engine (SAD_TEST_PST) process.

This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, for example, name, social security number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a *possible* match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates. You can also choose to create prospect records and assign 3Cs during the post process.

You can post the test scores to either Campus Solutions or PeopleSoft CRM (if you have installed PeopleSoft CRM) . The External Test Score Mapping page indicates which test scores can be posted to CRM. You can post the following the test scores to CRM: ACT, AP, CRS, DAT, EOS, GMAT, GMASS, GRE, LSAT, SAT, SSS and TOEFL. The following the test scores cannot be posted to CRM: ADA, AMCAS, LSDAS, NCEA, OUAC, QTAC, SATAC, Studielink, UAC, and VTAC. If you post the test scores to CRM, the Search/Match/Post Test Scores process automatically creates prospect records in CRM.

4. View each suspense record that did not get posted and confirm that it is actually a duplicate.

In the search dialog page of the suspense component, enter the test ID, *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match, then use Search Match to look up the bio/demo information that matches the suspense record and decide on your own whether a person who matches the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the Search/Match/Post Test Scores process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the person. To view a bio/demo record that the search/match/post process created, select Student Recruiting, External Test Score Processing, Add/Update a Person or Student Admissions, External Test Score Processing , Add/Update a Person. To view a test score record that the search/match/post process created or updated, select Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps to avoid confusion the next time that you load data into the suspense tables.

7. (Optional) Review test score candidate data.

When external test score loads contain additional information about the student, such as academic interests, extracurricular activities, and prior schools attended, the search/match/post process stores the data in the Test Score Candidate Data component.

The process does not store candidate data if you post the test scores to PeopleSoft CRM.

8. (Optional) Create prospects from tests.

Create prospects from posted test scores using query manager to define a specific population.

See [Chapter 12, "Recruiting Prospective Students," Understanding Creating Prospects from Test Scores with Query, page 127.](#)

9. (Optional) Create applicants from tests. Create applications for posted ADA, AMCAS, or LSAT/LSDAS tests.

See [Chapter 17, "Adding and Updating Applications," Pages Used to Create Applications from External Test Score Data, page 248.](#)

See Also

[Chapter 20, "Processing External Test Scores," Reviewing Test Score Candidate Data, page 384](#)

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Introducing Customer Relationship Management for Higher Education"

Loading External Test Score Files

To run an external test score load process, you must enter the directory path where the test data file is located (such as \\network\test files\ACT_1.dat). The process loads the data from the file into suspense tables.

This section lists prerequisites and discusses how to set up load parameters and load the file.

Prerequisites

Before you load external test scores, you must:

1. Set up tests and test components.
2. Set up test ID security for all appropriate users.
3. Configure the External Test Load Mapping page.
4. Configure the Ethnic Group Mapping page.
5. Configure Country Mapping if applicable to the test score being loaded.

See [Chapter 17, "Adding and Updating Applications," Pages Used to Create Applications from External Test Score Data, page 248.](#)

Page Used to Load External Test Score Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Load	SAD_TEST_LOAD	- Student Recruiting, External Test Score Processing, External Test Score Load - or Student Admissions, External Test Score Processing, External Test Score Load	Designate the directory location of the test scores that you are loading and enter the load parameters for that test. Note. You should complete the full loading, search/match and posting process before loading a new set of data. If you have test scores waiting to be processed, such as ACT test scores, do not load a new ACT test score file until you have processed the data in your ACT suspense files.

Setting Up Load Parameters and Loading the File

Access the External Test Score Load page (Student Recruiting, External Test Score Processing, External Test Score Load or Student Admissions, External Test Score Processing, External Test Score Load).

External Test Score Load

Run Control ID: GRE

[Report Manager](#) [Process Monitor](#)

Run

*Test ID

GRE

Graduate Record Exam

Test Score File Name and Path

\psb\dfs\dfs\hcm\CS_DEV\testfiles\EXT TEST LOAD\gre_2011.dat

Name Prefix

Male:

Mr

Female:

Ms

Unknown:

General Test Parameters

General Test Prior to August 1, 2011

Verbal Reasoning:

VERB

Verbal Reasoning

Quantitative Reasoning:

QUAN

Quantitative Reasoning

Revised General Test Beginning August 1, 2011

Verbal Reasoning:

NVR

New Verbal Reasoning

Quantitative Reasoning:

NQR

New Quantitative Reasoning

Analytical Writing:

ANLY

Analytical

External Test Score Load page (1 of 2)

Subject Test Parameters

Biochem, Cell & Molecular:	BC		Biochem, Cell, Molec Biology
Biochemistry Subscore:	BCS		Biochemistry Subscore
Cell Biology Subscore:	CBS		Cell Biology Subscore
Molecular Bio & Genetics Sub:	MBGS		Molecular Bio & Genetics Subsc
Biology:	BY		Biology
Cellular & Molecular Bio Sub:	CMBS		Cellular & Molecular Bio Subsc
Organismal Biology Subscore:	OBS		Organismal Biology Subscore
Ecology & Evolution Subscore:	EES		Ecology & Evolution Subscore
Chemistry:	CH		Chemistry
Computer Science:	CS		Computer Science
Literature in English:	EL		Literature in English
Mathematics:	MA		Mathematics (Subject)
Physics:	PH		Physics
Psychology:	PY		Psychology
Experimental Psychology Sub:	EPS		Experimental Psych Subscore
Social Psychology Subscore:	SPS		Social Psych Subscore

External Test Score Load page (2 of 2)

Test ID

Test ID

Select the test that you want to load. Define test ID values on the Test Tables page. Once the Test ID is entered, the additional fields specific to the test will appear. You must have Test ID Security established in order to select a value. This field is required.

Test Score Input File Name

Test Score Input File Name Enter the path of the directory and file where the test data resides. This field is required.

For the ADA test only:

In the AADSAS field, enter the name of the directory and file where the AADSAS data resides. This file contains the biographical, parent and family, secondary school, personal statement, release statement, and test score information.

In the AADSAS (Courses Completed) field, enter the name of the directory and file where the list of completed courses resides.

In the AADSAS (Courses Planned) field, enter the name of the directory and file where the planned or in-progress list of courses resides.

In the AADSAS (College) field, enter the name of the directory and file where the list of attended colleges resides.

In the AADSAS (GPA) field, enter the name of the directory and file where the GPA data resides.

In the AADSAS (GPA per College) field, enter the name of the directory and file where the GPA summary for each college resides.

In the AADSAS (GPA per Session) field, enter the name of the directory and file where the GPA summary for each session resides.

Name Prefix

Male, Female, and Unknown Test score loads do not include name prefixes. They do, however, include gender. Select the prefix according to the gender provided in the test data load. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are *Dr*, *Miss*, *Mr*, *Mrs*, and *Ms*.

Test Parameters

The test components appear based on the test ID that you entered. For example, ACT has seven components as part of its test, but LSAT reports only one component. After the Test ID field is populated, enter the test component corresponding to each test parameter listed. The prompt in test parameters displays only the test components for the test ID. Test components are mapped to the test ID on the Test Table page. You may leave these fields blank for EOS, GMASS, and SSS. The Test components must be entered for all other tests.

See [Chapter 8, "Setting Up External Test Score Loads," page 63](#).

Score and Percentile

For EOS, GMASS, and SSS only: For each test component, enter the score and percentile that you want to appear for all of the EOS, GMASS, and SSS records that you load. EOS, GMASS, and SSS are search tapes and do not deliver test scores. If you used test scores or percentiles as part of your criteria when purchasing the search tape, you have the option of entering that information on the page. The scores and percentiles will be posted for each person on the search tape. You may leave these fields blank.

Mapping Additional Test Codes

For AP, SAT, and SSS only: These tests require that you map additional test codes for the test. To begin, click the button to retrieve the test codes for the test ID. The left column is the delivered test code. This is the code that the testing organization defines. (To view the delivered codes, select Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, and then choose the component that you want to review.) The right column is the corresponding component that you defined on the Test Component page and mapped to the test ID on Test Table page. Select the test component that corresponds to the delivered test code.

Other Parameters**Test Date, Test Day, Test Month, Degree Day, Graduation Day, and Graduation Month**

The PeopleSoft date format requires a day, month, and year. If the date format for a test omits one of these numbers, the system asks you to enter the numeric value for the missing number (such as day, month, or graduation day) that you want the load process to use when it converts the date to the PeopleSoft date format. This also allows the program to populate the Degree Date and Graduation Date information to the prospect record if you select the Create Prospect field on the Search/Match/Post Test Scores page. Values for Test Day, Degree Day, and Graduation Day are 1 through 28. Values for Test Month and Graduation Month are 1 through 12.

LSAT/LSDAS Test Score

For LSAT/LSDAS only: Select *LSAT* or *LSDAS* to indicate the type of file that you are loading.

Score/Test Type

For ADA only: Select *USA* or *CAN* to indicate if the test is administered for the United States or Canada. The test components on the page change based on the option that you select.

SAT I Search, PSAT/NMSQT Search, or AP Search

For SSS only: Your institution can buy the names of students who have either taken the SAT I, PSAT/NMSQT, or AP exams. Select the search tape that you are loading. The format of the file varies according to the test that you are loading.

School Tape Type

For SAT only: Select the type of file that you're loading: *College* or *Secondary*. The default is *College*. The format of the file varies between the two school tape types.

Initial or Full

For DAT only: Select one of these options to determine whether to have the system load the student's middle name initial or the full middle name. The default setting is to load the middle initial.

Correcting and Editing Data in the Suspense Record

This section provides an overview of the correcting and editing of suspense data and discusses how to review:

- Test score suspense data.
- Personal information.
- Test score data.

Understanding the Correcting and Editing of Suspense Data

You edit information in the suspense record. However, remember that the search/match/post process only posts bio/demo data and test score data to your database. The system stores additional data that the test loads contain in the Test Score Candidate Data component. This data does not affect other tables in your database.

Before entering the External Test Score Suspense component, you must enter the test ID and at least one other search criteria. The pages in the component dynamically appear based on the test ID that you enter. The pages in the component are similar in the way that they look and work. For example, every suspense component has a Personal Information page and a Tests page. In addition, they all share the first page: the Test Score Suspense Data page. Some testing agencies ask questions about college preferences, high school activities, and transcript information. Independent of the testing agency, core, and supplemental data are handled similarly within the system.

Much of the data that is loaded into the suspense record is data that the person entered when completing the student profile section of the test. If the person left out information or did not complete the entire section, there will be empty fields in the suspense component.

Many of the values and codes that appear in the suspense component are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer to the test score layouts that you receive from the testing agency.

Correcting Load Errors

An error is indicated on the External Test Score Suspense component when certain values are missing or invalid. You will see an error flag for First Name or Last Name if the value is not populated. In addition an error flag will appear for the following data if it is invalid for the test ID entered: Birthdate, Graduation Date, Test Date, Test Component, Country, Subject Test Code, and Degree Date. An invalid test score is a score that is outside the valid test score range according to the ranges that you defined on the Test Table page. The program validates the country for every test where a country code is received. The country code is validated against the PS Country table, with the exception of GMAT and ADA, which have their own country mapping tables. Find the field that contains the missing value and enter a valid value. You can find the First Name, Last Name, and Birthdate fields on the Personal Information page, and the Test Date and Test Component fields on the Tests page. For other error indicators, look through the suspense component to find the corresponding field and enter a valid value.

After you enter a valid value for the fields that were missing or incorrect, save the component. The Edit field on the Process Options page should now display *Complete*. Be sure to correct all errors before posting the data.

Note. Data in suspense tables does not affect tables in your database until you post the data by running the search/match/post process. In addition, if you find an error in the suspense component after you run the search/match/post process, you must go to the proper page in your database to make any changes. For example, if you found an error on the Personal Information page in the suspense component, you must go to the Add/Update a Person component in the External Test Score Processing menu to correct the error.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Searching for Records and Using Search/Match," Using Search/Match

Pages Used to Correct and Edit Data in the Suspense Record

Page Name	Definition Name	Navigation	Usage
Test Score Suspense Data	SAD_SUSP_PROC_OPTN	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Test Score Suspense Data - Student Admissions, External Test Score Processing, External Test Score Suspense, Test Score Suspense Data	View and correct load process results and test score messages. This page appears for every test ID.
Personal Information	SAD_ACT_SUS_BIO SAD_ADA_SUS_BIO SAD_AMC_SUS_BIO SAD_AP_SUS_BIO SAD_CRS_SUS_BIO SAD_DAT_SUS_BIO SAD_EOS_SUS_BIO SAD_GMS_SUS_BIO SAD_GMT_SUS_BIO SAD_GRE_SUS_BIO SAD_LAW_SUS_BIO SAD_SAT_SUS_BIO SAD_SSS_SUS_BIO SAD_TFL_SUS_BIO	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Personal Information - Student Admissions, External Test Score Processing, External Test Score Suspense, Personal Information	Review and edit the student's personal information in the suspense record. Refer to the data layouts from the testing agency to determine the fields that will appear. Each test has a Personal Information page. The data varies depending on the test ID.

Page Name	Definition Name	Navigation	Usage
Tests	SAD_ACT_SUS_TST SAD_ADA_SUS_TST SAD_AMC_SUS_TST SAD_AP_SUS_TST SAD_CRS_SUS_TST SAD_DAT_SUS_TST SAD_EOS_SUS_TST SAD_GMS_SUS_TST SAD_GMT_SUS_TST SAD_GRE_SUS_TST SAD_LAW_SUS_TST SAD_SSS_SUS_TST SAD_TFL_SUS_TST	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Tests - Student Admissions, External Test Score Processing, External Test Score Suspense, Tests	Review or edit test data in the suspense record. Some of the information on this page is required (such as test date and test components). If this information is missing in the external test data load, you must enter valid values here before posting the record. Refer to the data layouts from the testing agency to determine the fields that will appear. Each test has a Tests page, with the exception of SAT. The data varies depending on the test ID.
Academics	SAD_ACT_SUS_SPS	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Academics - Student Admissions, External Test Score Processing, External Test Score Suspense, Academics	For ACT only: Review or edit academic data in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear. Note that the same changes have been made to the corresponding candidate data page (SAD_ACT_CD_ACAD).]
Activities	SAD_ACT_SUS_COL	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Activities - Student Admissions, External Test Score Processing, External Test Score Suspense, Activities	For ACT only: Review and edit activity information in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.
Interests	SAD_ACT_SUS_INT	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Interests - Student Admissions, External Test Score Processing, External Test Score Suspense, Interests	For ACT only: Review and edit interest data in the suspense record. Refer to the data layouts from ACT to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Education	SAD_ADA_SUS_OTH	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Education - Student Admissions, External Test Score Processing, External Test Score Suspense, Education	For ADA only: Review and edit education data in the suspense record. Refer to the data layouts from Associated American Dental Schools Application Service (AADSAS) to determine the fields that will appear.
Courses	SAD_ADA_SUS_CRD	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Courses - Student Admissions, External Test Score Processing, External Test Score Suspense, Courses	For ADA only: Review and edit course detail information in the suspense file. Refer to the data layouts from AADSAS to determine the fields that will appear.
Applicant Data	SAD_ADA_SUS_ADDL SAD_AMC_SUS_OTH	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Applicant Data - Student Admissions, External Test Score Processing, External Test Score Suspense, Applicant Data	For ADA only: Review and edit applicant data in the suspense record. Refer to the data layouts from AADSAS to determine the fields that will appear.
Family Information	SAD_ADA_SUS_FAMILY	Student Recruiting, External Test Score Processing, External Test Score Suspense, Family Information Student Admissions, External Test Score Processing, External Test Score Suspense, Family Information	For ADA only. Review and edit the family information data in the suspense record. Refer to the data layouts from AADSAS (Associated American Dental Schools Application Service) to determine the fields that will display.

Page Name	Definition Name	Navigation	Usage
Essays	SAD_ADA_SUS_ESSAY	Student Recruiting, External Test Score Processing, External Test Score Suspense, Essays Student Admissions, External Test Score Processing, External Test Score Suspense, Essays	For ADA only: Review and edit the personal statement data in the suspense record. Refer to the data layouts from AADSAS to determine the fields that will display.
Colleges	SAD_AMC_SUS_COL	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Colleges • Student Admissions, External Test Score Processing, External Test Score Suspense, Colleges	For AMCAS only: Review and edit college data in the suspense record. Refer to the data layouts from American Association of Medical Colleges (AAMC) to determine the fields that will appear.
GPA/Hours	SAD_AMC_SUS_GPA	• Student Recruiting, External Test Score Processing, External Test Score Suspense, GPA/Hours • Student Admissions, External Test Score Processing, External Test Score Suspense, GPA/Hours	For AMCAS only: Review and edit undergraduate education data in the suspense record. Refer to the data layouts from AAMC to determine the fields that will appear.
Schools	SAD_AP_SUS_SCH	• Student Recruiting, External Test Score Processing, External Test Score Suspense, Schools • Student Admissions, External Test Score Processing, External Test Score Suspense, Schools	For AP only: Use the Schools page to review and edit school data in the suspense record. Refer to the data layouts from Educational Testing Service (ETS) to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Awards	SAD_AP_SUS_PREV SAD_SSS_SUSP_SDQ	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Awards - Student Admissions, External Test Score Processing, External Test Score Suspense, Awards	For AP and SSS only: Review and edit additional question information in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
Additional Information	SAD_CRS_SUS_ACI	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Additional Information - Student Admissions, External Test Score Processing, External Test Score Suspense, Additional Information	For CRS only: Review and edit additional information in the suspense record. Refer to the data layouts from Law School Admission Council (LSAC) to determine the fields that will appear.
Profile Data	SAD_GRE_SUS_PRFL	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Profile Data - Student Admissions, External Test Score Processing, External Test Score Suspense, Profile Data	For GRE only: Review and edit profile data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
Prior Schools	SAD_LAW_SUS_MTR	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Prior Schools - Student Admissions, External Test Score Processing, External Test Score Suspense, Prior Schools	For LSAT/LSDAS only: Review and edit prior schools attended in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
Candidate Data	SAD_LAW_SUS_ACI	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Candidate Data - Student Admissions, External Test Score Processing, External Test Score Suspense, Candidate Data	For LSAT/LSDAS only: Review and edit candidate data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
Recommendations	SAD_LAW_SUS_REC	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Recommendations - Student Admissions, External Test Score Processing, External Test Score Suspense, Recommendations	For LSAT/LSDAS only: Review and edit recommendation data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
Academics	SAD_LAW_SUS_SCH	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Academics - Student Admissions, External Test Score Processing, External Test Score Suspense, Academics	For LSAT/LSDAS only: Review and edit academic data in the suspense record. Refer to the data layouts from LSAC to determine the fields that will appear.
SAT I	SAD_SAT_SUS_SATI	- Student Recruiting, External Test Score Processing, External Test Score Suspense, SAT I - Student Admissions, External Test Score Processing, External Test Score Suspense, SAT I	For SAT only: Review and edit SAT I data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.

Page Name	Definition Name	Navigation	Usage
SAT II	SAD_SAT_SUS_SATII	- Student Recruiting, External Test Score Processing, External Test Score Suspense, SAT II - Student Admissions, External Test Score Processing, External Test Score Suspense, SAT II	For SAT only: Review and edit SAT II data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
Student Data	SAD_SAT_SUS_SDQ SAD_SSS_SUS_SDQ	- Student Recruiting, External Test Score Processing, External Test Score Suspense, Student Data - Student Admissions, External Test Score Processing, External Test Score Suspense, Student Data	For SAT and SSS only: Review and edit student data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.
School Data	SAD_SAT_SUS_SDQ2	- Student Recruiting, External Test Score Processing, External Test Score Suspense, School Data - Student Admissions, External Test Score Processing, External Test Score Suspense, School Data	For SAT only: Review and edit school data in the suspense record. Refer to the data layouts from ETS to determine the fields that will appear.

Reviewing Test Score Suspense Data

Access the Test Score Suspense Data page (Student Recruiting, External Test Score Processing, External Test Score Suspense, Test Score Suspense Data or Student Admissions, External Test Score Processing, External Test Score Suspense, Test Score Suspense Data).

Test Score Suspense Data		Personal Information	Tests	Academics	Activities	Interests	
Last Name:		Record Number:	100327				
First Name:	Pavel	Date Loaded:	08/13/2004				
Middle Initial:	A						
Test ID:	ACT	ACTAssessment					
Processing Options							
*Edit:	Error	*Search:	Perform	*Post:	Awaiting Search/Match		
Error Indicators							
☒ Last Name ☒ Birthdate ☒ Test Date							
Search / Match Results							
Order Number:	0	Matches:	0				
Messages							
Customize Find View All First 1-4 of 6 Last							
Severity	Message Text	Description	Comments	Process Instance	Run Date/Time	Process Name	User ID
1 Message	A blank last name was detected. Verify entry.			204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
2 Message	An invalid birth date was detected. Verify Entry.		An invalid birth date of "31" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
3 Message	Record has been loaded.	Record was loaded by the load program.	First Name : Pavel Middle Initial : A Last Name :	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS
4 Error	An invalid test date has been detected. Verify Entry.		An invalid Test Date of "1996" was detected.	204	08/13/2004 3:03:59PM	SAD_TST_LOAD	PS

Test Score Suspense Data page

This page provides the status of a suspense record regarding the loading, search/match and posting processes.

Any informational and error messages that external test data load and search/match/post processes generate appear on this page. You can use this page to keep current on the status of an individual's test score processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your test score processing. To do so, you would need to wait to purge your test score messages until you have completed your analysis.

Processing Options

Edit

Displays the status of the load process for this suspense record. The load process populates this value.

Complete: The load process loaded the test score data without a problem. This record is ready to be posted.

Error: The load process encountered problems when loading the test score data. The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete*.

Perform: You set this value manually. This is for informational purposes only.

Search

Displays the status of the search/match process for this suspense record. The search/match process populates this value.

Complete: The search/match process completed successfully.

Error: The search/match process encountered problems. Refer to the log file for information regarding the error.

Perform: The search/match process will process this record the next time that you run the process.

Post

Displays the status of the record regarding the search/match/post process. You can enter these values manually; however, some are entered by the system after processes are run, as described in the following table. If the process created a new person in your database, the process generates an ID for the person and displays it in the ID field on the page. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when you run the search/match/post process. When set manually, this value means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Personal Information page.	Set by the system during the search/match process if no match was found in your database (only when you run search/match and post and different times). Set manually.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

<i>Post Value</i>	<i>Meaning</i>	<i>How Set</i>
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually, means that the process identified a match, and the user determined manually that duplication exists. The system makes available the ID field on the Personal Information page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Awaiting Search/Match	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the Edit, Search, and Post fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Last Name, Test Date, Birth Day, First Name, Graduation Date, High School Graduation Date, and Test Component

When a load error occurs, the load external data process displays the required values that were missing or incorrect in the load. Go to the Personal Information page, the Tests page, or another page in the Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error, the system clears the check box and the fields will no longer appear. After all of the check boxes are cleared and the component is saved, the system displays *Complete* in the Edit field.

Search/Match Results

Order Number

You know that the search/match/post process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Number field. Use this information to decide whether a possible duplicate exists.

Matches

Displays the number of matches that the process found at the order number given.

Messages

Message Severity	The message severity, such as <i>Message</i> or <i>Error</i> .
Message Text	The message on this row of data.
Description	The detailed message.
Comments	Results or other additional information about the message.
Process Instance	The process number of the process that you ran for this record. Process Scheduler generates this number.
Run Date/Time	The day and time that the process ran for this record.
Process Name	The name of the application engine that you ran for this record (for example, in the previous page example, the messages displayed from running SAD_TST_LOAD application engine, which is the External Test Score Load process).
User ID	The user ID of the person who ran the process.

Reviewing Personal Information

Access the Personal Information page (Student Recruiting, External Test Score Processing, External Test Score Suspense, Personal Information or Student Admissions, External Test Score Processing, External Test Score Suspense, Personal Information).

Test Score Suspense Data

Personal Information

Tests

Academics

Activities

Interests

Last Name:Ronning

Record Number:100135

First Name:Cliff

Date Loaded:06/09/2010

Middle Initial:M

Test ID:ACTACT Assessment

Personal Information

ID:

Name Prefix:Mr

Birthdate:11/01/1975

ACT Birthdate:19751101

Gender:Male

ACT Gender:M

SSN:606-99-1205

ACT SSN:606991205

Address 1:6464 Eportia Cir

City:Mesa

State:AZArizona

ACT State:AZ

Postal Code:85215

Country:USAUnited States

Telephone Number:602/924-5340

ACT Phone Type:1

Citizenship Status:Native

ACT Citizenship:1

Legal Resident of State:1

Email Address:cronning5_az@gmail.com

ACT Hispanic or Latino:2

Ethnicity:6

Ethnic Group Selection

Race Responses

CustomizeFindView All

First1-2 of 2Last

Ethnicity	Ethnic Group	Description		
2	ASIAN	Asian	+	-
4	PACIF	Native Hawaiian/Other Pacific Islander	+	-

Personal Information page (1 of 2)

Profile Information	
Religion:	28
Disability:	1
ROTC:	2
Distance From College:	3
English Spoken at Home:	1
Vocation Choice:	453
Expected Highest Educ Level:	3
Planned Housing:	1

Confidence In	Planned Academic Load
Vocation:	☒ Full Time
College Major:	☐ Part Time

Personal Information page (2 of 2)

Use Personal Information page in the suspense component to review and edit biographical and demographic data loaded through the external test data load. Use this page to edit the person's last name, first name, and birth date, if the external data load omitted these values. The data varies depending on the test ID. Common fields are described in this section.

When the search/match/post process posts the data in the suspense record, the process posts much of this data to the newly created personal information record.

Note. If the search/match/post process finds a match and updates the existing record with the data in the suspense file, the process does not update the personal information. This prevents you from overriding verified information.

Record Number	Displays the test record number. This number is automatically populated based on the Installation parameters.
Date Loaded	Displays the date that you loaded this record.
Last Name, First Name, and Middle Initial	Displays the person's last name, first name, and middle initial or middle name, as they appear in the test record. If the Last Name or First Name fields are empty, enter values.
ID	This field is unavailable until you run the search/match/post process. The search/match/post process generates an ID and displays it here when the process creates a new record. If the process finds a match and updates an existing record, the process enters the ID of the record that it updated. If the process finds a match and retains the record in the suspense table, and you decide to update an existing ID (by selecting <i>Update ID</i> in the Post field on the Process Options page), a prompt becomes available. Click the prompt to select the ID that you want to update.
Birthdate	Displays the person's birth date after the load process converts it to the PeopleSoft date standard from the birth date reported on the test.

Name Prefix	Displays a name prefix, according to the gender from the test record and the prefix criteria that you set up on the External Test Score Load page.
Gender	The person's gender. The load process converts the person's gender as reported in the test record to the corresponding PeopleSoft gender code.
Ethnic Group	Displays the person's ethnic group. The load process converts the person's ethnicity code as reported on the test record to the corresponding PeopleSoft ethnic group. This value is populated based on the Ethnic Group Mapping page. This setup must be done for the Test ID indicated or a value will not appear.
SSN (social security number)	Displays the person's social security number after the load process converts it to the PeopleSoft standard from the social security number reported on the test.
Address 1,Address 2, City, State,Countryand Postal Code	Displays the person's address. The load program validates the country for every test where a country code is received. The country code is validated against the PS Country table, with the exception of GMAT and ADA, each of which has its own country mapping table.
Telephone	Displays the person's telephone number.
Citizenship Status	Displays the person's citizenship status. This value is populated based on the conversion of the data from the test record to a PeopleSoft value. Values for this field are delivered with your system as translate values.

Reviewing Test Score Data

Access the Tests page (Student Recruiting, External Test Score Processing, External Test Score Suspense, Tests or Student Admissions, External Test Score Processing, External Test Score Suspense, Tests).

Test Score Suspense Data

Personal Information

Tests

Academics

Activities

Interests

Last Name: Ronning

Record Number: 100135

First Name: Cliff

Date Loaded: 06/09/2010

Middle Initial: M

Test ID: ACT ACT Assessment

Test Score Data

'Test Date: 06/03/1996

ACT Test Date: 199606

'Test ID: ACT ACT Assessment

Test Location: F Corrected Score Indicator:

Reporting Year: 95 Sum of Scale Scores: 068

☒ Standard Test Administration

						Score	Percentile
	Post	Error	Test Component			Post	ACT
English:	☒	☐	ENGL English			19.00	19 37 37
Math:	☒	☐	MATH Math			22.00	22 68 68
Reading:	☒	☐	READ Reading			13.00	13 5 05
Science Reason:	☒	☐	SCIRE Science Reasoning			14.00	14 2 02
Composite:	☒	☐	COMP Composite			17.00	17 15 15
English/Writing:	☐	☐	EW Combined English/Writing				--
Writing:	☐	☐	WR Writing				--

Tests page

- Test Date

Displays the day that this person took the test. The load process converts the test date delivered with the test to the PeopleSoft format, which appears here. The search/match/post process posts the test date to your database when you run the process for this suspense record.
- Test ID

Displays the ID of the test taken by this person. Define test IDs on the on the Test Tables page. The test ID is entered as a parameter during the load process.
- Post

The load process selects this check box if the score and component are valid. You can post the score for this component.

Error	The load process selects this check box if it encounters an error with either the component or the score during the load process. You can view additional information about this error on the Test Score Suspense Data page. The error must be cleared in order for the component and score to post to Test Results. Once the specific error is corrected, the Error check box is cleared and the Post check box is selected.
Test Component	Displays the test components that you selected on the External Test Score Load page for the test ID.
Score and Percentile	Displays the reported score and percentile for each component (if applicable).

Performing the Search/Match Process and Posting External Data

This section provides an overview of performing search/match and posting test scores and discusses how to:

- Process search/match/post test scores.
- Set up search/match parameters for test score data.

Understanding Performing Search/Match and Posting Test Scores

The search/match/post process consists of two separate processes that complement each other. The search/match process uses data from the suspense record to determine if the person might already exist in your database. The purpose of the search/match is to prevent duplicate records. Duplicate records are difficult to find and delete after they have been created. The post process uses the data in the suspense record to create persons if they do not already exist and to create or update test score data based on the search/match results. The post process also creates or updates test score candidate data.

You can specify what you want the post process to do when search/match finds a match (or multiple matches). Based on the results of the search/match process, the post process can update the record in your database that matches the suspense record if you are sure that the person in your database is the same person to whom the test data relates. For example, if the search/match process found a matching social security number, you might be confident that this is the same person, so the post process could update the record automatically. You can also define search/match parameters that tell the post process to wait on posting the record. This enables you to review the record and decide manually if it matches a record already in your database. For example, you would want to check whether duplication exists if the only parameters that matched were name and gender.

If the search/match process does not find a match, and you selected the Add option for the New parameter on the Search Parameters page, the post process populates data from the suspense record to your database. Data from the suspense records post to the Add/Update a Person component, the Test Results component, and the Test Score Candidate Data component. After you post suspense data, you must use these components to edit the information.

You can perform the search/match and post processes separately, or you can perform them together. You should run the search/match and post processes in one step. This ensures that you process the records in the correct order.

You might run the search/match/post process more than once for a suspense record. If the search/match/post process finds possible matches in the suspense table, you must manually determine whether a match exists and then run the process again.

You can also create prospect records for all students for whom you post external test data. Before you create prospects as part of the search/match/post process, you can optionally configure test ID mapping options for academic interests, extracurricular activities, religious preference, admit terms, and program, plan and subplan. You can also define event IDs for 3Cs.

Pages Used to Perform the Search/Match Process and Posting External Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search/Match/Post Test Scores	SAD_TEST_POSTS	- Student Recruiting, External Test Score Processing, Search/Match/Post/Test Scores - Student Admissions, External Test Score Processing, Search/Match/Post Test Scores	Post external test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Parameters page. You can post a single record or all of the records in the suspense file. You can also create prospect records from this data.
Search Parameters	SEARCH_PARMS	- Student Recruiting, External Test Score Processing, Search/Match/Post/Test Scores, Search Parameters - Student Admissions, External Test Score Processing, Search/Match/Post Test Scores, Search Parameters	Use this page to set up your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete. This page is the same for each Test ID entered on the Search/Match/Post Test Scores page.

Processing Search/Match/Post Test Scores

Access the Search/Match/Post Test Scores page (Student Recruiting, External Test Score Processing, Search/Match/Post/Test Scores or Student Admissions, External Test Score Processing, Search/Match/Post Test Scores).

Search/Match/Post Test Scores

Search Parameters

Run Control ID:

ACT

[Report Manager](#)

[Process Monitor](#)

Run

'Test ID

ACT

ACT Assessment

Execution Option

☐ Search, Match and Post

☒ Post Only

☐ Search and Match Only

Ethnicity Update Rules

☒ Update All Records

☐ Update If Not Populated

Update IPEDS Ethnicity Flag

☒ For All Person Records Posted

☐ For New Person Records Added

☐ Do Not Update

Hispanic/Latino Ethnic Group

Ethnic Group

HISPA

Hispanic/Latino

Post Processing Parameters

☒ Process Single Record

100129

TREVORC

LINDEN

'Data Source:

ACT

'Address Type:

Home

☒ Populate Email Address

Email Type:

Home

Commit Frequency

1

☐ Create Prospects

Search/Match/Post Test Scores page

Test ID

Enter the test ID that you want to process. Once you enter the test ID, the additional fields specific to the test will appear. You must have Test ID Security established in order to select a value. The prompt will display only test IDs to which you have security to access. This field is required.

LSAT/LSDAS Test Score

The system displays this group box if you have selected the CRM for Higher Education check box on the SA Features page and if the test ID is LSAT.

LSAD Test Score

The system does not display the Post To group box if you select this option. You cannot post LSAD test scores to CRM.

LSAT Test Score

The system displays the Post To group box if you select this option. You can post the LSAT test scores to CRM.

Execution Option

Search, Match and Post	Select this option if you want the process to search your database for records that match the suspense record <i>and</i> post the suspense data to your database. This is the recommended option.
Post Only	Select this option if you want only to post the suspense data to your database (if you select this option, you must have already run search/match or manually changed the Search and Post process options on the External Test Score Suspense page).
Search and Match Only	Select this option if you want to only run the search and match process on the suspense file. You will need to post the data at a later time.

Post To

Campus Solutions	Select this option if you want to post the suspense data to Campus Solutions.
Enterprise CRM	Select this option if you want to post the suspense data to PeopleSoft CRM. The system displays this option if you have selected the CRM for Higher Education check box on the SA Features page of the Student Admin Installation component and if the test ID is eligible for posting to CRM. If the test ID is eligible for posting to CRM, the system displays the Available for CRM Post check box as selected on the External Test Score Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping).

Important: If you have opted to post to CRM and if there is no matching person record in Campus Solutions, the process does not create a EMPLID or any record in Campus Solutions. The process will only send the test score and prospect data as a message to Integration Broker. If you have opted to post to CRM and if there is a matching person record in Campus Solutions, the process adds a new record in the Test Results page for the EMPLID (Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results) in addition to sending the message to Integration Broker.

Ethnicity Update Rules

For ACT, LSAT/LSDas, AMCAS only:

Update All Records

Select this option if you want the process to post the ethnicity data to the ethnicity records (DIVERS_ETHNIC and ETHNICITY_DTL) for all existing EMPLIDS. The posted ethnicity data can be viewed on the Ethnicity page (Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity) or on the Regional page of the Add/Update a Person component (Campus Community, Personal Information or Personal Information (Student), Add/Update a Person).

If you select this option and if data already exists for an EMPLID on the ethnicity records, the process inserts a new row into the records for the EMPLID. If the Ethnic Group of NSPEC is currently populated on either ethnicity record, new rows will not be inserted.

Update If Not Populated

Select this option if you want the process to post the ethnicity data only for those EMPLIDS who do not have existing ethnicity data.

Set Hispanic/Latino Indicator

For LSAT/LSDAS only:

Hispanic/Latino Populated

Select this option if you want the process to check the Person is Hispanic or Latino check box on the Ethnicity or Regional page (HISP_LATINO = Y for a DIVERS_ETHNIC record).

If you select this option, the process checks the Person is Hispanic or Latino check box if the person's test score ethnicity data is mapped to an Ethnic Group with the EEO Ethnic Category of Hispanic/Latino (Ethnicity or Regional page displays EEO Ethnic Category as the Ethnic Category).

Do Not Update

Select this option if you do not want the process to check the Person is Hispanic or Latino check box on the Ethnicity page.

If you select this option, the process does not check the Person is Hispanic or Latino check box even if the person's test score ethnicity data is mapped to an Ethnic Group with the EEO Ethnic Category of Hispanic/Latino.

Update IPEDS Ethnicity Flag

For ACT, LSAT/LSDAS, and AMCAS only:

For New Person Records Added

Select this option if you want the process to check the IPEDS check box on each ethnic group row inserted to the Ethnicity or Regional page (ETH_VALIDATED = Y for each DIVERS_ETHNIC record) only for new EMPLIDS added to the system.

For All Person Records Posted

Select this option if you want the process to check the IPEDS check box on each ethnic group row inserted to the Ethnicity or Regional page (ETH_VALIDATED = Y for each DIVERS_ETHNIC record) for both new and updated EMPLIDS.

Do Not Update

This check box is available only for ACT. Select this check box if you do not want the process to check the IPEDS check box regardless of whether the suspense record contains ethnicity information.

Hispanic/Latino Ethnic Group

For ACT only:

Ethnic Group

Select the PeopleSoft ethnic group code that the search/match/post process should post to the Ethnicity group box of the Ethnicity or Regional page. The process posts this value only if the person is Hispanic or Latino.

Post Processing Parameters**Process Single Record**

Select this check box if you want to run the search/match/post process for a single suspense record. The field to the right becomes available. Select the suspense record that you want to process. Only records where the Edit processing option is set to Complete on the External Test Score Suspense component will appear.

Data Source

Select the data source from which this information was received. Data source is a required value on the Test Results page. The search/match/post process will post the value that you select here to the Test Results page. Values for this field are delivered with your system as translate values. You can modify these translate values.

Address Type

If the search/match/post process adds a new record to your database, the process loads the address information from the test record into the Addresses page. Select the address type that you want the process to assign to the new address. Define address types on the Address Type Table.

Phone Type

If the search/match/post process adds a new record to your database, the process loads the phone number from the test record to the Personal Information page. Select the phone type that you want to process to assign to the new phone number. This field will appear only for test IDs where the phone number is loaded.

Commit Frequency

The commit frequency enables you to decide how often the data is saved during the Search/Match/Post process. The field defaults to 1000. Edit this field to decrease or increase the number of records that are processed before being saved. The commit frequency can help with the performance of the program. A commit frequency that is too low, however, can slow the program down.

Populate Email Address, Email Type

Select this check box to post an email address to the Email Addresses on the Add/Update a Person component. If you choose to populate an email address, you must then select an email type.

Note. These fields appear only for test IDs where an email address is loaded.

Create Prospects

Select to create prospect records for the IDs that are added or for existing IDs where no prospect record exists from the test score post. The Default Prospect Values group box becomes available to enter default values for the prospect records that the system creates. You can view prospect data in the Create/Update Prospect component under the menu Student Recruiting, Maintain Prospects.

If you have selected the Enterprise CRM option in the Post To group box, the system selects the Create Prospects check box and disables it

You must enter the required fields in the Default Prospect Values group if the Create Prospects check box is selected.

Default Prospect Values

Select the default values that you want the system to assign to the prospects that you create from the test score post. For example, if you select *UGRD* in the Academic Career field, the system will assign every prospect it creates to the undergraduate academic career. To create prospects in Campus Solutions, you must enter an academic institution, academic career, recruiting status, and recruiting center. To create prospects in CRM, you must enter an academic institution, academic career, and recruiting status. Recruiting Center becomes an optional field if you have selected the Post to Enterprise CRM option. In certain circumstances, you might also want to assign additional information, such as academic program and plan, and admit term, when your test load contains a specific set of prospects.

Academic Program

Because the Academic Program table is keyed by admit term, you must select an admit term to select an academic program. You do not have to assign an academic program.

Assign 3C

If you are posting data to Campus Solutions, select this check box to assign 3Cs to the prospects that you create from the test score post. The Event ID field becomes available.

The system clears and disables this check box if you have selected the Enterprise CRM option in the Post To group box. The 3Cs feature is not available in CRM.

Event ID

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

If the testing agency provides a graduation date, the process uses the mapping defined on the Admit Term Map page to determine an admit term for a prospect. If the admit term mapping is not done or if the testing agency does not provide a graduation date, the process uses the default admit term defined on the Default Prospect Values group box. To navigate to the Admit Term Map page, select Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Admit Term Map.

If the testing agency provides an interest code, the process uses the mapping defined on the Program Plan SubPlan Map page to determine the program, plan and subplan for a prospect. If this mapping is not done or if the testing agency does not provide an interest code, the process uses the default program, plan, and subplan defined on the Default Prospect Values group box. To navigate to the Program Plan SubPlan Map page, select Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Create Prospects Setup, Program Plan SubPlan Map.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine," Understanding the 3C Engine.

Integration Broker Messages (Applicable Only If You Are Posting to CRM)

The system uses the PeopleSoft Integration Broker's Message Segmentation technology to transmit test score data from Campus Solutions to PeopleSoft CRM. When you post a test score record to CRM, the system creates a message for consumption by CRM. To view this message that contains the test score and prospect data:

1. Select People Tools, Integration Broker, Service Operations, Monitor, Monitoring, Asynchronous Services.
2. Click the number link below the New field for the SAD_CRM_DATA queue.
3. Click the Details link for a transaction (You can view the number of segments created and the transaction ID in the message log for the Search/Match/Post Test Score process).
4. Finally, click the Edit XML or the Download XML link on the Asynchronous Details page to view the message data.

To enable segmented messages, you will need to select the Segment Aware option on the Node Definitions page for the remote node defined on the local system.

The message has the following parts:

- Header Record (SAD_HEADER_CRM): The process creates one record for a test ID for each Search/Match/Post process run. This record includes the following fields: TEST_ID, RUN_CNTL_ID, INSTITUTION, ACAD_CAREER, DATE_LOADED, and ADM_RECR_CTR.
- Combined bio demo and prospect record (SAD_BIO_PRS_SUS): This record contains the following fields: TEST_ID, TEST_REC_NBR, EMPLID, BIRTHDATE, LAST_NAME, FIRST_NAME, MIDDLE_NAME, NAME_SUFFIX, NAME_PREFIX, ADDRESS_TYPE, ADDRESS1, ADDRESS2, ADDRESS3, CITY, STATE, COUNTRY, POSTAL, NATIONAL_ID_TYPE, NATIONAL_ID, CAMPUS, INSTITUTION, ACAD_CAREER, SEX, MAR_STATUS, PHONE, PHONE_TYPE, EMAIL_ADDR, E_ADDR_TYPE, ETHNIC_GRP_CD, REG_REGION, SETID, CITIZENSHIP_STATUS, RECRUITING_STATUS, ADM_REFRL_SRCE, ADMIT_TYPE, ADMIT_TERM, ACADEMIC_LEVEL, LAST_SCH_ATTEND, GRADUATION_DT, FIN_AID_INTEREST, HOUSING_INTEREST, and RELIGIOUS_PREF.
- SAD_PRS_PRG_SUS: This record includes a prospect's academic offering suspense table data (such as academic program and plan).

- SAD_PRS_INT_SUS: This record includes a prospect's academic interest suspense table data.
- SAD_PRS_EXT_SUS: This record includes a prospect's extra curricular activities suspense table data.
- Test Score Record (SAD_TST_COM_SUS): This record contains the following fields: TEST_ID, TEST_REC_NBR, TEST_COMPONENT, TEST_DT, LS_DATA_SOURCE, SCORE, SCORE_LETTER, EXT_ACAD_LEVEL, DATE_LOADED, PERCENTILE, TEST_ADMIN, TEST_INDEX0, REV_SCORE_IND, and TEST_ID_OVRD.

The process sets the TEST_ID_OVRD value for only SAT II test components and derives the field value from SAD_SAT_SUS_II.SAD_SAT_II_TEST_ID.

REV_SCORE_IND can contain the following values:

- *U*: Always update the test score.
- *C*: Compare and update if required. This value indicates CRM to update the score if the messaged score is greater than CRM score of the same test ID, component and test date.
- *N*: No Updates. This value indicates CRM to not update the existing CRM score. The process derives this value when SAD_SAT_SUS_I.REV_SCORE_IND_SAT is not equal to Z.
- Name/value pair record (SCC_NAME_VALUE). CRM does not use this record.

Once the messages are created, the Search/Match/Post Test Scores process sets the Search field to *Complete* and Post field to *Purge* on the Test Score Suspense Data page.

The CRM user then uses the PeopleSoft CRM's Manage Import Batches page to import the message data into the CRM production tables.

See PeopleSoft CRM for Higher Education PeopleBook for information about the Manage Import Batches page.

Data Enrichment to CS and CRM

Regardless of whether you are posting to CRM or Campus Solutions, if the person already exists in Campus Solutions, the process enters the following contact data from the suspense record into the Campus Solutions record if the values do not exist in Campus Solutions for the type entered on the run control page:

- Email
- Address
- Phone Number

For example, let us suppose you have selected phone type as HOME on the run control page and a person already has a phone number (480) 555–1212 with the phone type of HOME in Campus Solutions. The test score has a different phone number, (480) 666–6608, for the person. In this case, the process does not update the phone number in Campus Solutions. The phone number remains (480) 555–1212 in Campus Solutions. Conversely, let us suppose you have selected phone type as OTHER and a person has a phone number (480) 555–1212 with the phone type of HOME in Campus Solutions. The test score has a different phone number, (480) 666–6608, for the person. In this case, the process inserts the phone number (480) 666–6608 with a phone type of OTHER and also retains the HOME phone number of (480) 555–1212 in Campus Solutions.

Regardless of whether you are posting to CRM or Campus Solutions, if the following biographical fields do not have a value in Campus Solutions, the process enters the values from the test scores:

- SSN
- Birthdate
- Gender
- Ethnic Group

If the social security number has a value of 999-99-9999 in Campus Solutions, the process overwrites this value with the social security number provided by the test score. If the biographical fields already have a value, the process does not update the value. For example, if the prospect's birth date is October 8, 1977 in Campus Solutions and the test score has a birth date of October 9, 1977, the process does not update the birth date of the prospect. The birth date remains October 8, 1977

For those testing agencies who send last school attended as part of their layout (ACT, AP, EOS, GMAT, GMASS, SAT and SSS), the process will search against the ACT, ATP, FICE and IPEDS codes in the External Organization Table for a match. The process then sends the External Org ID value to CRM if a match is found. Campus Solutions sends all the other related fields for the External Org ID (Descr, City, State, Postal and Country) to CRM through the External Org EIP.

Setting Up Search Parameters for Test Score Data

Access the Search Parameters page (Student Recruiting, External Test Score Processing, Search/Match/Post/Test Scores, Search Parameters or Student Admissions, External Test Score Processing, Search/Match/Post Test Scores, Search Parameters).

Except for the Ignore option, rest of the page functionality is similar to the Search Parm's page (Student Admissions, Application/Transcript Loads, TS130, Search/Match/Post Process, Search Parm's).

No Matches Found

New

Ignore: Ignore the unmatched record completely. The process retains the record in the suspense file with the post status of *awaiting search/match*.

Match(es) Found

One Match and Multiple Matches

Ignore: Ignore the suspense record that matched a record in your database. The process retains the record in the suspense file with the post status of *awaiting search/match*.

See Also

Chapter 18, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 306

Researching Duplicate Records

In the search dialog page of the External Test Score Suspense component, enter the test ID that you want to review, *Complete* in the Edit Process Option field, and *Perform* in the Search/Match Process Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but did not get posted. The reason the search/match/post process did not post the records is because it found a possible duplicate record in the database. Upon entering the component, the Test Score Suspense Data page displays the search/match level involved in the possible match and the number of individuals in the database that match the criteria in the Search/Match Results group box.

For example, let's suppose that the Order Number field in the Search/Match Results group box displayed 40, and that three matches appear. At PSUNV, Order Number of 40 means that the process is checking for a matching name and gender. Therefore, you know that there are three people in your database with the same name and gender as the person in the suspense record. Use the Search/Match component to look up the name and gender that match the suspense record, and compare the other information (such as address) to determine whether the person in the database is the same as the person in the suspense record. Select Student Recruiting, External Test Score Processing, Search/Match or Student Admissions, External Test Score Processing, Search/Match to access this page.

If the person from the suspense record is *not* the same as a person in your database, set the Search field to *Complete* and the Post field to *New ID Add*.

If the person from the suspense record *is* the same as a person in your database, set the Search field to *Complete* and the Post field to *Update Existing ID*. Then go to the Personal Information page and enter the ID that you want to update. Note, however, that the search/match/post process only *updates* test score and candidate data information. The process does not update bio/demo data because some bio/demo data may have already been verified.

Rerunning the Search/Match/Post Process

The process posts the suspense records where you manually changed the Search/Match processing option to Complete and the Post processing option to New ID Add or Update Existing ID. By this time, all of your suspense records should be posted to your database. When a record posts a new record to your database, the post process assigns an ID to the person.

To view a bio/demo record that the post process created, select Student Recruiting, External Test Score Processing, Add/Update a Person or Student Admissions, External Test Score Processing, Add/Update a Person.

To view a test score record that the post process created or updated, select Student Recruiting, External Test Score Processing, Test Results or Student Admissions, External Test Score Processing, Test Results.

To view the additional data from the testing agency not posted to Test Results or Add/Update a Person, select Student Recruiting, External Test Score Processing, Test Score Candidate Data or Student Admissions, External Test Score Processing, Test Score Candidate Data.

If you chose to create a prospect record, select Student Recruiting, Maintain Prospects, Add/Update a Prospect.

See Also

[Chapter 13, "Tracking Supporting Prospect and Applicant Information," Tracking Test Results for Prospects and Applicants, page 155](#)

[Chapter 17, "Adding and Updating Applications," Entering or Updating Applicant Biographical Data, page 215](#)

Purging Suspense Files and Test Score Messages

This section discusses how to purge suspense records and test score messages.

Note. If you intend to perform an analysis on your test score processing, do not purge your test score messages with the External Test Score Purge process. Instead, purge them later when you no longer need to view them, using the Test Score Messages Purge process.

Pages Used to Purge Suspense Files and Test Score Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Test Score Purge	SAD_TEST_PURGE	- Student Recruiting, External Test Score Processing, External Test Score Purge - Student Admissions, External Test Score Processing, External Test Score Purge	Purge suspense records and test score messages for a specific test ID.
Test Score Messages Purge	TST_SCORE_PARMs	- Student Recruiting, External Test Score Processing, Test Score Messages Purge - Student Admissions, External Test Score Processing, Test Score Messages Purge.	Purge all test score messages. You can run a process to purge all test scores remaining in your suspense files for all external test scoreloads.

Purging Suspense Records and Test Score Messages

Access the External Test Score Purge page (Student Recruiting, External Test Score Processing, External Test Score Purge or Student Admissions, External Test Score Processing, External Test Score Purge).

External Test Score Purge

Run Control ID: CG

[Report Manager](#) [Process Monitor](#)

Run

'Test ID'

Purge Processing Parameter

☐ All Suspense Rows

Purge Option for All Rows

☐ All Suspense Rows

☐ Rows Loaded before or on

☒ Marked Suspense Rows

Purge Option for Marked Rows

☐ All Marked Suspense Rows

☒ Rows Loaded before or on

Message Purge Parameter

☐ Retain Associated Messages

☒ Remove Associated Messages

External Test Score Purge page

Test ID

Enter the test ID that you want to delete from the suspense record. The test ID list that appears in the prompt is based on the Test ID Security.

All Suspense Rows

Select this option to enable the Purge Option for All Rows group box.

Marked Suspense Rows

Select this option to enable the Purge Option for Marked Rows group box.

Purge Option for All Rows

All Suspense Rows

Select this option to purge all the suspense records.

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Rows Loaded before or on Select this option and enter a date to purge all suspense records that were loaded on or before the specified date.

Use the Date Loaded field on the Test Score Suspense Data page to see when you loaded a record.

Suppose you loaded records on May 10, 2009. Subsequently, you loaded another set of records on May 15, 2009. If you select the Rows Loaded before or on option and specify the date as May 15, 2009, the purge process deletes all suspense records that were loaded on May 15, 2009 and May 10, 2009.

Purge Option for Marked Rows

All Marked Suspense Rows Select this option to purge all the records in your suspense table that are marked *Purge* in the Post field of the Test Score Suspense Data page.

Rows Loaded before or on Select this option and enter a date to purge only those suspense records that were loaded on or before the specified date and that are marked *Purge* in the Post field of the Test Score Suspense Data page.

Suppose you loaded records on May 10, 2009. Subsequently, you loaded another set of records on May 15, 2009. If you select the Rows Loaded before or on option and specify the date as May 15, 2009, the purge process deletes the suspense records marked *Purge* that were loaded on May 15, 2009 and May 10, 2009.

Message Purge Parameter

Retain Associated Messages Select this option if you want to retain messages that are associated with the suspense records that you are purging.

Remove Associated Messages Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Reviewing Test Score Candidate Data

This section provides an overview of test score candidate data and discusses how to review:

- Candidate data personal information.
- Academic information.
- Student profile high school and college activity information.
- Interest information.

Understanding Test Score Candidate Data

The search/match/post process creates test score candidate data only if you are posting to Campus Solutions. If you are posting to CRM, the process does not create test score candidate data.

The search/match/post process posts candidate data (according to the test) to the Test Score Candidate Data component. This component is informational only. The data in this component does not affect other data in your database. For example, if you change a person's name in this component, it does not change the name anywhere else in the system. If you choose however to create prospects from test scores, some of this data is used for the process, such as graduation date, intended major, and extracurricular activities.

Many of the values and codes that appear in the Test Score Candidate Data components are based on values and codes that the testing agency defines. Contact the testing agency that manages the test for full descriptions of the data that appears in these pages or refer to the test score layout that you received from the testing agency.

Before entering the Test Score Candidate Data component, you must enter the test ID. The pages in the component dynamically appear based on the test ID that you entered. The number of pages that appear in the component depend on the test ID. You must have Test ID Security defined for your user ID in order to access the component. The pages shown here are examples of the Test Score Candidate Data component.

Pages Used to Review Test Score Candidate Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Information	SAD_ACT_CD SAD_ADA_CD SAD_AMC_CD SAD_LAW_CD SAD_SAT_CD SAD_SSS_CD	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Personal Information - Student Admissions, External Test Score Processing, Test Score Candidate Data, Personal Information	This page appears for the ACT, ADA, AMCAS, LSAT/LSDAS, SAT, and SSS. Review the student's personal information as it was received from the testing agency. The fields vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.
Test Score Candidate Data	SAD_AP_CD SAD_CRS_CD SAD_DAT_CD SAD_EOS_CD SAD_GMT_CD SAD_GRE_CD SAD_GMS_CD SAD_TFL_CD	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Test Score Candidate Data - Student Admissions, External Test Score Processing, Test Score Candidate Data, Test Score Candidate Data	This page appears for the AP, CRS, DAT, EOS, GMAT, GRE, GMAS, and TOEFL. Review the student's personal and academic information as it was received from the testing agency. The fields vary depending on the test ID. This page also indicates if the post process created an employee ID for this person.

Page Name	Definition Name	Navigation	Usage
Academics	SAD_ACT_CD_ACAD SAD_LAW_CD_SCH	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Academics - Student Admissions, External Test Score Processing, Test Score Candidate Data, Academics	This page displays for the ACT and LSAT/LSDas. Access a student's test and academic data as reported by the testing agency. The fields vary depending on the test ID.
Activities	SAD_ACT_CD_ACT	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Activities - Student Admissions, External Test Score Processing, Test Score Candidate Data, Activities	This page displays for ACT only. Access student profile high school and projected college activity information.
Interests	SAD_ACT_CD_INT	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Interests - Student Admissions, External Test Score Processing, Test Score Candidate Data, Interests	This page appears for ACT only. Access student profile interest and college preference information.
Education	SAD_ADA_CD_ED	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Education - Student Admissions, External Test Score Processing, Test Score Candidate Data, Education	This page appears for ADA. Review a student's academic history as reported from AADSAS.

Page Name	Definition Name	Navigation	Usage
Applicant Data	SAD_ADA_CD_DATA SAD_AMC_CD_OTH	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Applicant Data - Student Admissions, External Test Score Processing, Test Score Candidate Data, Applicant Data	This page appears for ADA and AMCAS. Review the student's data to support their application for admission as it was received from the testing agency. The fields vary depending on the test ID.
Application	SAD_ADA_CD_APP SAD_AMC_CD_APP	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Application - Student Admissions, External Test Score Processing, Test Score Candidate Data, Application.	This page appears for ADA and AMCAS. View the results of the Create Applicants from Test process for this student. You can also select not to create an application for this student by selecting <i>Do Not Use for Create Appl</i> in the Post Option field.
Courses	SAD_ADA_CD_CRD	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Courses - Student Admissions, External Test Score Processing, Test Score Candidate Data, Courses	This page appears for ADA. Review a student's academic course work and grades as reported by AADSAS.
Family Information	SAD_ADA_CD_FAMILY	Student Recruiting, External Test Score Processing, Test Score Candidate Data, Family Information Student Admissions, External Test Score Processing, Test Score Candidate Data, Family Information	This page appears for ADA. Review the family information.
Essays	SAD_ADA_CD_ESSAY	Student Recruiting, External Test Score Processing, Test Score Candidate Data, Essays Student Admissions, External Test Score Processing, Test Score Candidate Data, Essays	This page appears for ADA. Review the personal statement data

Page Name	Definition Name	Navigation	Usage
Colleges	SAD_AMC_CD_COL	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Colleges - Student Admissions, External Test Score Processing, Test Score Candidate Data, Colleges	This page appears for AMCAS. Review a student's prior colleges attended as well as previous majors and degrees earned, as provided by AAMC.
GPA/Hours	SAD_AMC_CD_GPA	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, GPA/Hours - Student Admissions, External Test Score Processing, Test Score Candidate Data, GPA/Hours	This page appears for AMCAS. Review a student's grade point averages and credit hours, as provided by AAMC.
Awards	SAD_AP_CD_AWRD	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Awards - Student Admissions, External Test Score Processing, Test Score Candidate Data, Awards	This page appears for AP. Review the student's awards information including award type and year, as reported from the Advanced Placement exam.
Schools	SAD_AP_CD_SCHL	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Schools - Student Admissions, External Test Score Processing, Test Score Candidate Data, Schools	This page appears for AP. Review a student's high school and college information as reported from the Advanced Placement exam.

Page Name	Definition Name	Navigation	Usage
Test Data	SAD_AP_CD_TEST SAD_LAW_CD_SB SAD_SAT_CD_TEST	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Test Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Test Data	This page appears for the AP, LSAT/LSDAS, and SAT. Review additional test data as reported by the testing agency that is not posted to the Test Results page. The fields vary depending on the test ID.
Additional Data	SAD_CRS_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Additional Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Additional Data.	This page appears for CRS. Review the student's academic, employment, and search-related data, as provided by LSAC.
Prior Schools	SAD_LAW_CD_MATR	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Prior Schools • Student Admissions, External Test Score Processing, Test Score Candidate Data, Prior School.	This page appears for LSAT/LSDAS. Review undergraduate academic data and prior law schools attended, as provided by LSAC.
Candidate Data	SAD_LAW_CD_CD	• Student Recruiting, External Test Score Processing, Test Score Candidate Data, Candidate Data • Student Admissions, External Test Score Processing, Test Score Candidate Data, Candidate Data	This page appears for LSAT/LSDAS. Review the student's additional test and application information, as provided by LSAC.

Page Name	Definition Name	Navigation	Usage
Recommendations	SAD_LAW_CD_REC	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Recommendations - Student Admissions, External Test Score Processing, Test Score Candidate Data, Recommendations	This page appears for LSAT/LSDAS. Review letter of recommendation data as provided by LSAC.
Student Data	SAD_SAT_CD_STD SAD_SSS_CD_SDQ	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, Student Data - Student Admissions, External Test Score Processing, Test Score Candidate Data, Student Data	This page appears for SAT and SSS. Review additional information about the student, as provided by ETS. The fields vary depending on the test ID.
School Data	SAD_SAT_CD_SCH	- Student Recruiting, External Test Score Processing, Test Score Candidate Data, School Data - Student Admissions, External Test Score Processing, Test Score Candidate Data, School Data	This page appears for SAT. Review college preference information for a student. If the test type is <i>college</i> , you can review the high school information for the student, as provided by ETS. If the test type is <i>secondary</i> , you can review the colleges that the student submitted test scores to, as provided by ETS. The data that appears on the page depends on the test type that you selected during the external test score load process.

Reviewing Candidate Data Personal Information

Access the Personal Information page (Student Recruiting, External Test Score Processing, Test Score Candidate Data, Personal Information or Student Admissions, External Test Score Processing, Test Score Candidate Data, Personal Information).

Personal InformationAcademicsActivitiesInterests

Leoff FourtnallADACT002

Test ID: ACTACT Assessment

Test InformationFind | View AllFirst1 of 1Last

'Test Date:11/05/1999

'Personal Data Impacts:Caused Personal Data Update

Personal Information

Last Name:FourtnallMiddle Initial:A

First Name:LeoffACT SSN:-01365930

Birthdate:19861022Gender:F

Address 1:18601 Main StACT Citizenship:1

City:Port CharlesLegal Resident of State:1

State:NY

Postal Code:85242Grade Level:11

Telephone Number:602/987-3031Phone Type:3

HS Code:052390High School Graduation Year:2005

Email Address:lft890@yahoo.com

ACT Ethnicity:3ACT Hispanic or Latino:2

Ethnic Group Selection

Race ResponsesCustomize | Find | View All | First1 of 1Last

Ethnicity	Ethnic Group	Description
5	WHITE	White

Personal Information page (1 of 2)

Profile Information			
Marital Status:	☐	English Spoken at Home:	1
Religion:	34	Previous College Credit:	☐
Disability:	☐	Estimated First Year GPA:	☐
ROTC:	2	Expected Highest Educ Level:	5
Planned Entry Date:	☐	Distance From College:	4
Planned Housing:	4	Military Active Duty:	☐

Vocation	Confidence In		
First Choice:	760	Vocation:	2
Second Choice:		College Major:	1

Planned Academic Load	Day/Evening Classes
☒ Full Time	☐ Day
☐ Part Time	☐ Evening

Personal Information page (2 of 2)

Personal and academic data posted from the suspense record appears in these fields.

Test ID	Displays the test you entered on the search page. The pages to the component vary based on the test ID.
Test Date	Displays the day the person took the test.
Personal Data Impacts	Indicates whether the process added a new EMPLID to your database or updated the personal data for an existing EMPLID. The system displays one of the following values for this field: - Caused Personal Data Creation - No Personal Data Impact - Caused Personal Data Update

Reviewing Academic Information

Access the Academics page (Student Recruiting, External Test Score Processing, Test Score Candidate Data, Academics or Student Admissions, External Test Score Processing, Test Score Candidate Data, Academics).

Personal Information	Academics	Activities	Interests
Leoff Fourtnall		ADACT002	
Test ID: ACT		ACT Assessment	
Test Information Find View All First 1 1 of 1 Last			
Test Date:	11/05/1999	Personal Data Impacts:	Caused Personal Data Update v
Reporting Year:	95	Sum of Scale Scores:	099
Test Location:	R		
Academic Information			
GPA:	7	Class Rank:	1
Major Plan:	410	Class Size:	5
High School Descr:	1	High School Prog Type:	4
High School Grades			
English:		Math:	
Social Studies:	4.3	Natural Sciences:	3.4
HS Average:	3.50		
High School Honors Courses			
English:	1	Math:	1
Foreign Language:	1	Natural Sciences:	1
Social Studies:	1		
Financial Aid			
Apply:	1	Work:	1
Parents Income:	5	Hours Expect to Work:	3
Father/Guardian 2 Ed Level:	1	Mother/Guardian 1 Ed Level:	4

Academics page (1 of 2)

Years Subjects Studied

Find | View All

First 1-8 of 8 Last

*Subject	Years of Study	
English	1	+ -
Foreign Language (French)	7	+ -
Foreign Language (German)	6	+ -
Foreign Language (Other)	8	+ -
Foreign Language (Spanish)	5	+ -
Mathematics	2	+ -
Natural Sciences	4	+ -
Social Studies	3	+ -

Academics page (2 of 2)

Academic information data posted from the suspense record appears in these fields.

Reviewing Student Profile High School and College Activity Information

Access the Activities page (Student Recruiting, External Test Score Processing, Test Score Candidate Data, Activities or Student Admissions, External Test Score Processing, Test Score Candidate Data, Activities).

Personal InformationAcademics**Activities**Interests

Bryce Landolf0049

Test ID: ACTACT Assessment

Test InformationFind | View AllFirst1 of 1Last

Test Date: 04/01/2006*Personal Data Impacts: Caused Personal Data Creation

College Expected Extracurricular ActivitiesFind | View AllFirst1-8 of 16Last

*ActivitiesParticipation

Campus or Community Service	☐	+ -
Departmental Clubs	☐	+ -
Debate	☐	+ -
Dramatics, Theater	☐	+ -
Fraternity or Sorority	☒	+ -
Intramural Athletics	☒	+ -
Instrumental Music	☐	+ -
Political Organizations	☐	+ -

High School ActivitiesFind | View AllFirst1-8 of 16Last

*ActivitiesParticipated

Departmental Clubs	☐	+ -
Debate	☐	+ -
Dramatics, Theater	☐	+ -
Fraternity or Sorority	☐	+ -
Intramural Athletics	☒	+ -
Instrumental Music	☐	+ -
Political Organizations	☐	+ -
Publications	☐	+ -

Activities page

High school and college activities data posted from the suspense record appears on this page.

Reviewing Interest Information

Access the Interests page (Student Recruiting, External Test Score Processing, Test Score Candidate Data, Interests or Student Admissions, External Test Score Processing, Test Score Candidate Data, Interests).

Personal Information		Academics		Activities		Interests	
Bryce Landolf				0049			
Test ID: ACT		ACT Assessment					
Test Information Find View All First 1 of 1 Last							
Test Date:		04/01/2006		Personal Data Impacts:		Caused Personal Data Creation	
College Choice Number:		S		College Code Number:		1428	
Interest Inventory							
		Score:		Percentile:			
Science:		71					
Arts:		39					
Social Service:		37					
Business Contact:		43					
Business Operations:		54					
Technical:		60					
Map Regions							
Region 1:		06		Region 2:		07	
				Region 3:		08	
ACT Subscores							
		Enhanced (Scale):		National Norms:		Local Norms:	
Usage/Mechanics		10		55		36	
Rhetorical Skills		09		38		17	
Elementary Algebra		09		39		17	
Algebra/Coordinate Geometry		12		78		59	
Plane Geometry/Trigonometry		12		75		57	
Social Studies/Science		11		59		43	
Arts/Literature		09		38		20	

Interests page (1 of 2)

Preference for College					
Student Body Size:	3	Gender:	1	Type:	1
Max Annual Tuition:		State (1):	17	State (2):	37
State (3):	05	State (4):	10	State (5):	44
Ranking of					
Type College:	5	Location:	3	Gender:	6
Student Body Size:	4	Tuition:	2	Field of Study:	1
Other Factor:	7				
Predictive Percentile Ranking					
Overall:	1: 05	2: 01	3: 01	4: 02	5: 10
Specific Courses:	1: 03	2: 10	3: 16	4: 05	5: 14
Natl Norm - ACT Scale Scores					
Norms Type:	0	English:	44	Math:	59
Reading:	41	Science Reason:	73	Composite:	56
English/Writing	--	Writing	--		
Writing Score Descriptions					
Description 1	--	Description 2	--		
Description 3	--	Description 4	--		

Interests page (2 of 2)

Interest and college preference data posted from the suspense record appears on this page.

Viewing Test Score Messages Summary Information

This section discusses how to use the Test Score Messages page to view a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Page Used to View Test Score Messages Summary Information

Page Name	Definition Name	Navigation	Usage
Test Score Messages	TST_SCORE_MSG_TBL	- Student Recruiting, External Test Score Processing, Test Score Messages - Student Admissions, External Test Score Processing, Test Score Messages	View a list of all test score messages stored in your suspense files for any record loaded through an external test score load.

Viewing Test Score Messages Summary Information

Access the Test Score Messages page (Student Recruiting, External Test Score Processing, Test Score Messages or Student Admissions, External Test Score Processing, Test Score Messages).

Test Score Messages

[Find](#) | [View All](#)
First 1 of 38 Last

Test ID:
Record Number:

Process Instance:
Date Loaded:

Last Name:
First Name:

ID:

Record Number: 100326
Process Instance: 204

ID:
Last Name: Linden
First Name:

Run Date/Time: 08/13/2004 3:03:59PM
Date Loaded: 08/13/2004

User ID: PS
Process Name: SAD_TST_LOAD

Message Set Number: 14200
Message Number: 125

Message Severity: Message

Message Text:

Description:

Comments:

Test Score Messages page

Test ID

Enter the test ID for which you want to view the test messages. The fields that appear in the prompt are based on your Test ID security.

Record Number	Select the record number for which you want to search for test score messages.
Process Instance	Select the process instance for which you want to search for test score messages.
Date Loaded	Select the date loaded for which you want to search for test score messages.
Last Name	Select the last name for which you want to search for test score messages.
First Name	Select the first name for which you want to search for test score messages.
ID	Select the ID for which you want to search for test score messages.
Search	Click to find information matching your search criteria.

Chapter 21

(NZL) Processing NCEA Test Scores

This chapter provides an overview of National Certificate of Educational Achievement (NCEA) processing and discusses how to:

- Set up NCEA test data.
- Process NCEA test scores.
- Access NCEA test data in display-only mode.

Understanding NCEA Test Score Processing

NCEA is New Zealand's national qualification for senior secondary students. NCEA is part of the National Qualifications Framework (NQF). Through NCEA, students can record their achieved standards, thereby acquiring credits on the NQF, as well as a variety of test results. For example, when students have achieved 80 credits at level 1, they qualify for a NCEA level 1, so long as eight of those credits show numeracy skills and eight other credits show literacy skills.

See Also

www.nzqa.govt.nz/ncea/index.html

Setting Up NCEA Test Data

Before you can load, review, post, or purge NCEA test data, you must complete some setup requirements.

This section discusses how to:

1. Define NCEA test components.
2. Define NCEA test IDs.
3. Map NCEA subject codes to each NCEA test ID component.

Pages Used to Prepare for NCEA Test Score Processing

Page Name	Definition Name	Navigation	Usage
Test Component Table	SA_TEST_COMP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Component Table	Define test components to attach to test IDs.
Test Tables	SA_TEST_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables	Define an NCEA test ID and assign test components.
NCEA Subject Code Map	SAD_NCEA_MAPSB_NZL	Student Admissions, Processing Admissions NZL, NCEA Subject Code Map	Map subject codes.

Defining NCEA Test Components

Access the Test Component Table page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Component Table).

Test Component Table

Test Component: ACCTG

Find | View All First ◀ 1 of 1 ▶ Last

***Effective Date:** 01/01/1900
***Status:** Active

***Description:** Accounting

Short Description: Accounting

Test Component Table page

Define NCEA test components.

See Also

Chapter 8, "Setting Up External Test Score Loads," Defining External Test Components, page 64

Defining NCEA Test IDs

Access the Test Tables page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables).

Test Tables

Test ID: NCEA

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: NCEA

Short Description: NCEA

Testing Agency: NZ Qualifications Authority

Find | View All First 1-4 of 4 Last

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest
ACCTG	Accounting	Accounting	0.00	0.00	
BIOLY	Biology	Biology	0.00	0.00	
CHEMS	Chemistry	Chemistry	0.00	0.00	
CMPST	Computing Studies	Computing	0.00	0.00	

Test Tables page

Add a test ID of NCEA and enter test component details.

See Also

Chapter 8, "Setting Up External Test Score Loads," Defining External Test Components, page 64

Mapping NCEA Subject Codes to each NCEA Test ID Component.

Access the NCEA Subject Code Map page (Student Admissions, Processing Admissions NZL, NCEA Subject Code Map).

NCEA Subject Code Map		
Test ID:	NCEA	NCEA
Test Component:	ACCTG	Accounting
Find View All First 1 of 1 Last		
*Effective Date:	01/01/1900	*Status: Active
Subject Group Code:	1	

NCEA Subject Code Map page

For each NCEA test component, map a subject group code.

Processing NCEA Test Scores

This section provides an overview of the steps required for NCEA processing, and discusses how to:

- Load NCEA test scores.
- Review NCEA suspense file process options.
- Review basic bio/demo data.
- Review other bio/demo data.
- Review subjects.
- Review standard results.
- Review suspense load messages.
- Post NCEA suspense data.
- Set up search/match parameters for NCEA data.
- Review posted NCEA data.
- Review posted NCEA data details.
- Purge the NCEA suspense files.

Understanding How to Process NCEA Test Scores

To process test scores:

1. Load the test score data from a file in your directory into a suspense table using the NCEA test score load process.

There are four files: Candidate File, Subject Group File, Result File, and Standard File.

2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search dialog page of the suspense component, enter *Error* in the Edit Processing Option field and click the Search button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field on the Process Options page.

3. After you have corrected all of the load errors, run the search/match/post process.

This process looks for data in your database (based on search parameters that you define on the search/match criteria pages, that can include, for example, name, ID number, and birth date) that matches the data that you are posting. For a set of parameters that suggest only a possible match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates.

4. View each suspense record that did not get posted to confirm that it is actually a duplicate.

On the Search Dialog page of the Suspense component, enter the NCEA test ID, *Complete* in the Edit Process Option field and *Perform* in the Search/Match Process Option field. Click the Search button. The search process finds only those suspense records that were not posted in the search/match/post process. The search/match/post process does not post records if it encounters a possible duplicate record in the database. After you access the component, find the parameters for which the process identified a match. Use Search Match to find the bio/demo information that matches the suspense record and decide whether a person who matches the incoming data already exists in the system. Specify whether you want the search/match/post process to add the bio/demo and test record to your database, update an existing record, or ignore the suspense record.

5. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. By this time, all of your suspense records should be posted to your database. To view a test score record that the search/match/post process created or updated, use the NCEA Test Results page.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records have been posted to the database. This helps to avoid confusion the next time that you load data into the suspense tables.

7. Review or edit posted test results.

Pages Used to Process NCEA Test Load Data

Page Name	Definition Name	Navigation	Usage
NCEA Load External Data	SAD_RCTL_NCEA_LD_N	Student Admissions, Processing Admissions NZL, NCEA Load External Data	Run the NCEA Data Load SQR process (ADUEBNZL), in order to load NCEA test scores in to the suspense tables.

Page Name	Definition Name	Navigation	Usage
Process Options	SAD_NCEA_SPROC_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Process Options	View and correct load process results.
Bio/Demo Data	SAD_NCEA_SPBIO_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Bio/Demo Data	Review and edit the student's personal information in the suspense record.
Other Bio/Demo Data	SAD_NCEA_SPOTR_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Other Bio/Demo Data	Review and edit additional personal information in the suspense record.
Subjects	SAD_NCEA_SPSUB_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Subjects	Review and edit the student's loaded subject data.
Standard Result	SAD_NCEA_SPSTD_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Standard Result	Review and edit the student's loaded standard result record.
Messages	SAD_NCEA_MSG_NZL	Student Admissions, Processing Admissions NZL, NCEA Suspense, Messages	Review message details from the load process.
Search/Match Parameters	SEARCH_PARMS	Student Admissions, Processing Admissions NZL, NCEA Search/Match/Post, Search/Match Parameters	Define your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete.
NCEA Post Parameters	SAD_RCTL_NCEAPST_N	Student Admissions, Processing Admissions NZL, NCEA Search/Match/Post, NCEA Post Parameters	Post NCEA test data from suspense files. Before you post the data, however, set up the search/match parameters on the Search/Match Parameters page. You can post a single record or all of the records in the suspense file.
NCEA Test Results	SAD_NCEA_TERES_NZL	Student Admissions, Processing Admissions NZL, NCEA Test Results, NCEA Test Results	View a student's posted NCEA test data.

Page Name	Definition Name	Navigation	Usage
Additional Test Score Detail	SAD_NCEA_TSTSC_SEC	Click the Details button on the NCEA Test Result page.	Review additional information about a test component.
NCEA Purge Suspense File	SAD_RCTL_NCEAPRG_N	Student Admissions, Processing Admissions NZL, NCEA Purge Suspense File	Purge NCEA suspense records.

Loading NCEA Test Scores

Access the NCEA Load External Data page (Student Admissions, Processing Admissions NZL, NCEA Load External Data).

NCEA Load External Data

Run Control ID: NCEA [Report Manager](#) [Process Monitor](#) Run

Test Parameters

Academic Institution: PeopleSoft Australia Uni

*NCEA Year:

*NCEA File Number:

NCEA File Path 1:

NCEA File Path 2:

NCEA File Path 3:

NCEA File Path 4:

NCEA Load External Data page

The NCEA Data Load process loads four files: A candidate record, a subject group summary record, and a result record, (each of which is loaded into suspense and then posted to the profile test results tables), and a standard record, which is loaded each time to provide a temporary look up table. The temporary standard table is used by the load SQR to obtain the subject group for each standard/version on the result record. It is also used to obtain more detail about each standard.

Reviewing NCEA Suspense File Process Options

Access the Process Options page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Process Options).

Process Options		Bio/Demo Data		Other Bio/Demo Data		Subjects		Standard Result		Messages	
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2						
Last Name:	Nceacandidate	First Name:	Kiwi								
Name 2:	Student	Name 3:									
Processing Options											
Edit:	Complete ▼	Search:	Complete ▼	Post:	Purge ▼						
Error Indicators											
☐ Last Name ☐ First Name											
☐ Birthdate											
Search / Match Results											
Order Nbr:	30	Matches:	1								

Process Options page

This page provides the status of a suspense record regarding the loading process. Any informational and error indicators that NCEA data load processes generate appear on this page. You can use this page to keep current on the status of an individual's NCEA processing.

Processing Options

Edit

Displays the status of the load process for this suspense record. The load process populates this value.

- *Complete:* The load process loaded the data without a problem. This record is ready to be posted.
- *Error:* The load process encountered problems when loading the data.

The system indicates the values that you must correct in the Error Indicators group box. Correct all errors and save the data before running the search/match/post process on this record. After you correct the errors and save the component, the system changes the field value to *Complete*.

- *Perform:* You set this value manually.

This is for informational purposes only.

Search

Displays the status of the search/match process for this suspense record. The search/match process populates this value.

- *Complete:* The search/match process completed successfully.
- *Error:* The search/match process encountered problems.

Refer to the log file for information regarding the error.

- *Perform:* The search/match process will process this record the next time you run the process.

Post

Displays the status of the record regarding the search/match/post process. These values can be entered manually; however, some are entered by the system after processes are run as described in the table below. If the process updated an existing person's record, the process displays the ID that was updated in the ID field on the Bio/Demo page.

<i>Post Value</i>	<i>Meaning</i>	<i>How Set</i>
Delete Update ID	Not used with NCEA.	Not used with NCEA.
Error	The posting process encountered a problem.	Set by the system during the search/match/post process.
New ID Add	Not used with NCEA.	Not used with NCEA.
No Action	Search/match/post and purge suspense file processes will ignore the record if this value is entered.	Set manually.
Purge	Indicates that this suspense record will be removed from the system during the purge suspense file process.	Set by the system during the search/match/post process if the record was successfully processed.

Post Value	Meaning	How Set
Update ID	The search/match/post process found a matching ID in the database. The process will update the matching records with the data from this suspense record. When set manually, means that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Personal Information page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	Set by the system during the search/match process if a match was found in the database and if your search parameters define that an update should occur in this situation (only when you run search/match and post and different times). Set manually.
Wait Srch	This record is in the suspense file and is waiting to be processed by the search/match/post process.	Set by the system during the load external data process.

Note. While you can manually edit the values in the Edit, Search and Post fields, keep in mind that if a field contains *Error* and you manually change it without correcting an error, you may experience problems when posting the data.

Error Indicators

Last Name, First Name, and Birthdate When a load error occurs, the load external data process displays the required values that were missing or incorrect in the load. Go to the Bio/Demo Data page or another page in the NCEA Suspense component where the missing or incorrect data resides to enter a valid value. When you correct the error the system clears the check box and the fields will no longer appear. After all of the check boxes are cleared and the component is saved, the system enters *Complete* in the Edit field.

Search/Match Results

Order Nbr (order number) You know that the search/match process found a match and did not post the suspense record when the Search field contains *Perform* and displays the search order number that led to the match in the Order Nbr field. Use this information to decide whether or not a possible duplicate exists.

Matches Displays the number of matches that the process found at order number given.

Reviewing Basic Bio/Demo Data

Access the Bio/Demo Data page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Bio/Demo Data).

Process Options				Bio/Demo Data		Other Bio/Demo Data		Subjects		Standard Result		Messages	
NSN:		99132223				NCEA Year:		2004		NCEA File Number:		2	
Last Name:		Nceacandidate				First Name:		Kiwi					
Name 2:		Student				Name 3:							
Personal Information													
ID:													
Gender:		Male				Date of Birth:		07/17/1986 					
Address 1:		75 Stanaway Street											
Address 2:		Northcote											
Address 3:		Auckland											
Address 4:													
City:						School Code:		37					

Bio/Demo Data page

Review and edit the student's personal information in the suspense record.

Reviewing Other Bio/Demo Data

Access the Other Bio/Demo Data page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Other Bio/Demo Data).

Process Options

Bio/Demo Data

Other Bio/Demo Data

Subjects

Standard Result

Messages

NSN:99132223

NCEA Year:2004

NCEA File Number:2

Last Name:Nceacandidate

First Name:Kiwi

Name 2:Student

Name 3:

NCEA Details

☒ UEBS Citizen

☒ UE Numeracy Achieved

☒ Level 3 Achieved

☒ UE Achieved

☒ UE Literacy Achieved

☐ Scholarship Qual Awarded

Total Credits L3 Achieved:117

Total Credits L3 Not Achieved:

Total Schol Standards Achieved:1

Total Scholl Stds Not Achieved:3

L3 Credits Achvd Previous Yrs:

Other Bio/Demo Data page

Review and edit additional personal information in the suspense record.

Reviewing Subjects

Access the Subjects page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Subjects).

Process Options

Bio/Demo Data

Other Bio/Demo Data

Subjects

Standard Result

Messages

NSN:99132223

NCEA Year:2004

NCEA File Number:2

Last Name:Nceacandidate

First Name:Kiwi

Name 2:Student

Name 3:

FindView AllFirst1 of 4Last

Test Component:ACCTGAccounting

Total Credits Achieved:24

Total Credits Not Achieved:

Subjects page

Review and edit NCEA subject information in the suspense record. Each component has its own row and details.

Reviewing Standard Results

Access the Standard Result page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Standard Result).

Process Options

Bio/Demo Data

Other Bio/Demo Data

Subjects

Standard Result

Messages

NSN:99132223

NCEA Year:2004

NCEA File Number:2

Last Name:Nceacandidate

First Name:Kiwi

Name 2:Student

Name 3:

FindView All

First1 of 4Last

Test Component:ACCTGAccounting

Standard Code:90500

Version:1

Level:03

Credit Value:4

Standard type: Achievement Standard

Assessment type: External

☐ UE Approved Subject

Result:A

Date Completed:04/28/2004

Standard Result page

Review and edit NCEA standard result file information in the suspense record. Each component has its own row and corresponding detail rows.

Reviewing Suspense Load Messages

Access the Messages page (Student Admissions, Processing Admissions NZL, NCEA Suspense, Messages).

Process Options	Bio/Demo Data	Other Bio/Demo Data	Subjects	Standard Result	Messages																												
NSN:	99132223	NCEA Year:	2004	NCEA File Number:	2																												
Last Name:	Nceacandidate	First Name:	Kiwi																														
Name 2:	Student	Name 3:																															
Find View All First 1 of 1 Last <table border="1"> <tbody> <tr> <td>Run Date/Time:</td> <td>07/31/2005 5:15:59AM</td> <td>Process Instance:</td> <td>1130</td> </tr> <tr> <td>User ID:</td> <td>PS</td> <td>Process Name:</td> <td>ADPSTNZL</td> </tr> <tr> <td>Message Set Number:</td> <td>14200</td> <td>Message Number:</td> <td>129</td> </tr> <tr> <td>Message Severity:</td> <td>M Message</td> <td></td> <td></td> </tr> <tr> <td>Message Text:</td> <td colspan="3">Search/Match has been completed.</td> </tr> <tr> <td>Description:</td> <td colspan="3">The Search/Match procedure makes a determination as to whether or not the person might already exist within the system. Based upon the results of the Search/Match and what the run control parameters were set to, the person could be indicated as 'NEW', 'UPDATE', 'SUSPEND' or 'IGNORE'.</td> </tr> <tr> <td>Comments:</td> <td colspan="3">The record has been determined to be a(n) "UPDATE" and the person matched at Search/Match level "30"</td> </tr> </tbody> </table>						Run Date/Time:	07/31/2005 5:15:59AM	Process Instance:	1130	User ID:	PS	Process Name:	ADPSTNZL	Message Set Number:	14200	Message Number:	129	Message Severity:	M Message			Message Text:	Search/Match has been completed.			Description:	The Search/Match procedure makes a determination as to whether or not the person might already exist within the system. Based upon the results of the Search/Match and what the run control parameters were set to, the person could be indicated as 'NEW', 'UPDATE', 'SUSPEND' or 'IGNORE'.			Comments:	The record has been determined to be a(n) "UPDATE" and the person matched at Search/Match level "30"		
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Messages page

Any messages that the NCEA load process generates appear on this page. Use this page to find the most current information on the status of an individual's NCEA data processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your processing. Therefore, you should purge your NCEA messages only *after* you have completed your analysis.

Posting NCEA Suspense Data

Access the NCEA Post Parameters page (Student Admissions, Processing Admissions NZL, NCEA Search/Match/Post, NCEA Post Parameters).

NCEA Post Parameters

Search/Match Parameters

Run Control ID: NCEA

[Report Manager](#)[Process Monitor](#)

Run

Search/Match/Post Exec Options

☒ Search, Match and Post

☐ Post Only

☐ Search and Match Only

Post Processing Parameters

Academic Institution:

PSNZL

*NCEA Year:

2004

*NCEA File Number:

First Examination File

☒ Process Single Record

National Student Number:

100840250

NCEA Post Parameters page

Search/Match/Post Exec Options

- Search, Match and Post

Select this option if you want the process to search your database for records that match the suspense record and post the suspense data to your database. This is the recommended option.
- Post Only

Select this option if you only want to post the suspense data to your database (if you select this option, you must have already run search/match or manually changed the Search and Post process options on the External Test Score Suspense page).
- Search and Match Only

Select this option if you only want to run the search and match process on the suspense file. You will need to post the data at a later time.

Post Processing Parameters

- Academic Institution

Enter the institution for which you want to post NCEA suspense data.
- NCEA Year

Enter the year of the NCEA examination.

- NCEA File Number

Specify the examination file you want to post. Values are:
 - First Examination File
 - Second Examination File
 - Third Examination FileNCEA file number values are delivered with your system as translate values and you should not modify them.
- Process Single Record

Select this check box if you want to run the search/match/post process for a single suspense record. The National Student Number field becomes available.
- National Student Number

The national student number for the single record you want to process. This field applies only if you have selected the Process Single Record check box.

Setting Up Search Parameters for NCEA Data

Access the Search/Match Parameters page (Student Admissions, Processing Admissions NZL, NCEA Search/Match/Post, Search/Match Parameters).

NCEA Post Parameters

Search/Match Parameters

Run Control ID: NCEA

[Report Manager](#) [Process Monitor](#)

Run

*Search Parameter:

No Match Found

	Add	Update	Suspend	Ignore
New:	☒	☐	☐	☐

Match(es) Found

Find | View All

1 of 1

Order Nbr:

*****Parameters Refreshed*****

One Match:	☐	☒	☐	☐
Multiple Matches:	☐	☒	☐	☐

Search/Match Parameters page

Use this page to set up your search/match parameters. These are the rules that determine what the post process should do with the suspense record after the search/match process is complete.

See Also

Chapter 18, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 306

Reviewing Posted NCEA Data

Access the NCEA Test Results page (Student Admissions, Processing Admissions NZL, NCEA Test Results, NCEA Test Results).

NCEA Test Results

Kiwi NceacandidateRWG002

Find | View AllFirst1 of 1Last

*Test ID: NCEANCEAChecklist Item Update

Defaults for Components

Test Date:Data Source:Acad Level:

Find | View AllFirst1 of 1Last

☒ UE Achieved

☒ UE Literacy Achieved

☒ UE Numeracy Achieved

☐ Scholarship Qual Awarded

☒ Level 3 Achieved

L3 Credits Achvd Previous Yrs:

Total Credits L3 Achieved:117

Total Credits L3 Not Achieved:

Total Schol Standards Achieved:1

Total Scholl Stds Not Achieved:3

Find | View AllFirst1 of 4Last

Test Component: ACCTGTest Date: 12/31/2004Data Source: Extract

Total Credits Achieved:24

Total Credits Not Achieved:Detail

NCEA Test Results page

Use this page to review a student's loaded NCEA test score data.

Reviewing Posted NCEA Data Details

Access the Additional Test Score Detail page (Click the Details button on the NCEA Test Result page).

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Additional Test Score Detail

Test Component:

ACCTG

Test Date:

12/31/2004

Data Source:

E Extract

Find | View All First 1 of 6 Last

Standard Code:

90500

Version:

1

Level:

03

Credit Value:

4

Standard type:

Achievement Standard

Assessment type:

External

☐ UE Approved Subject

Result:

A

Date Completed:

04/28/2004

Additional Test Score Detail page

Review additional information about an NCEA test component.

Purging the NCEA Suspense Files

Access the NCEA Purge Suspense File page (Student Admissions, Processing Admissions NZL, NCEA Purge Suspense File).

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NCEA Purge Suspense File

Run Control ID: NCEA

[Report Manager](#) [Process Monitor](#) Run

*NCEA Year:

2004

*NCEA File Number:

First Examination File

Purge Processing Parameter

☒ All Suspense Rows

☐ Marked Suspense Rows

Message Purge Parameter

☐ Retain Associated Messages

☒ Remove Associated Messages

NCEA Purge Suspense File page

NCEA Year and NCEA File Number	When you purge NCEA suspense files, you do so by year and file number. Enter a year and file number that correspond to the suspense records you want to delete.
All Suspense Rows	Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.
Marked Suspense Rows	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the Post field on the Process Options page. Select this option if you suspect that there are still suspense records that need to be processed. The purge process will only delete suspense records with <i>Purge</i> in the Post field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Accessing NCEA Test Data in Display-Only Mode

In some instances, you may want to provide view only or basic summary view access to users. Assign access to the Student Profile component (SAD_NCEA_SPS_NZL) to do so.

This section lists the pages used to view NCEA summary information.

Pages Used to View NCEA Summary Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bio/Demo Data	SAD_NCEA_S_BIO_NZL	Student Admissions, Processing Admissions NZL, NCEA Student Profile, Bio/Demo Data	Review basic biographical information for an individual.
Other Bio/Demo Data	SAD_NCEA_S_OTR_NZL	Student Admissions, Processing Admissions NZL, NCEA Student Profile, Other Bio/Demo Data	Review biographical and demographic information for an individual.
Subjects	SAD_NCEA_SSUBJ_NZL	Student Admissions, Processing Admissions NZL, NCEA Student Profile, Subjects	Review an individual's NCEA subject record.
Standard Result	SAD_NCEA_S_STD_NZL	Student Admissions, Processing Admissions NZL, NCEA Student Profile, Standard Result	Review an individual's NCEA standard result record.

Chapter 22

(AUS) Managing Tertiary Admissions Centre Data Loads

This chapter provides an overview of Tertiary Admissions Centre (TAC) data load processing and discusses how to:

- Prepare for TAC processing.
- Process TAC loads.
- Review and edit data in the suspense record.
- Perform search/match and post TAC data.
- Purge TAC suspense files and messages.
- Review TAC candidate data.

Understanding TAC Data Load Processing

The TACs are the central offices that receive and process applications for admission to participating universities. PeopleSoft Campus Solutions supports the following TAC files:

- Queensland Tertiary Admission Center (QTAC)
- South Australia Tertiary Admission Center (SATAC)
- Victoria Tertiary Admission Center (VTAC)
- ACT and New South Wales Universities Admissions Centre (UAC)

As part of the processing of the student applications, the TACs send electronic offer details to the institutions. PeopleSoft Campus Solutions enables you to upload these offer details.

Preparing for TAC Processing

Before you can process and upload the TAC data loads, you must prepare your system with a variety of setup data, primarily mapping data rules for your institution that coincide with each TAC load that you process.

The following table lists the required setup tasks that must be completed before you import TAC files:

Task	Required for QTAC	Required for UAC	Required for SATAC	Required for VTAC
1. Set up TAC test IDs.	Yes	Yes	Yes	Yes
2. Assign user security to TAC test IDs.	Yes	Yes	Yes	Yes
3. Map TAC test IDs to PeopleSoft test codes.	Yes	Yes	Yes	Yes
4. Set up TAC program codes.	Yes	Yes	Yes	Yes
5. Set up TAC program code mapping.	Yes	Yes	Yes	Yes
6. Set up DEST number mapping.	Yes	Yes	No	No
7. Set up country code mapping.	Yes	Yes	Yes	Yes
8. Set up state code mapping.	Yes	Yes	Yes	Yes
9. Set up external organizations associated with the qualifications that you want to load.	Yes	Yes	Yes	Yes
10. Define TAC subjects.	Yes	Yes	No	Yes
11. Map year 12 types to external organizations.	Yes	No	No	No
12. Map TAC external institutions to external organizations.	No	No	No	Yes
13. Map origin of qualification values to external organizations.	Yes	No	No	No
14. Map subject codes to external organizations.	Yes	Yes	No	Yes
15. Set up qualification level mapping.	Yes	Yes	No	Yes
16. Set up name prefix mapping.	Yes	Yes	Yes	Yes
17. Add program action reason code for basis of admission mapping.	Yes	Yes	Yes	Yes

Task	Required for QTAC	Required for UAC	Required for SATAC	Required for VTAC
18. Map basis of admission values.	Yes	Yes	Yes	No
19. Map admit type values.	No	No	Yes	No
20. Define citizenship mapping rules.	Yes	Yes	Yes	Yes
21. Set up ethnicity mapping.	No	Yes	No	Yes
22. Set up DEST Language Code Mapping.	Yes	Yes	No	Yes
23. Offer Period Mapping	Yes	No	No	No
24. Honors Category Map	Yes	No	No	No

Pages Used to Prepare for TAC Processing

Page Name	Definition Name	Navigation	Usage
Test Tables	SA_TEST_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables	Set up TAC test IDs, such as QTAC, VTAC, SATAC, and UAC.
Test ID Security	SAD_TEST_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, Test ID Security	Assign the TAC test IDs that a user can access. The system enforces test ID security in several components throughout the system.
External Test Score Mapping	SAD_TEST_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping	Map TAC test IDs to suspense and candidate data records. Map the TAC test IDs you defined on the Test Table page to the PeopleSoft-delivered test code. The system needs this setup to perform a variety of external test-related functions. The PeopleSoft system delivers the following test codes for use with TAC: QTC, STC, UAC, and VTC.

Page Name	Definition Name	Navigation	Usage
Program Code Table	SSR_PRG_CD_TBL	Set Up SACR, Foundation Tables, Reporting Codes, Program Code Table AUS	Define the TAC program codes to which the applicants will apply through a TAC or TACs.
Acad Prog AUS	SSR_ACAD_PROG_AUS	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS	Map TAC program information to academic programs.
DEST Number Map	SAD_TAC_MAP_DEST	Set Up SACR, Product Related, Recruiting and Admissions, TAC, DEST Number Map	Associate a fact code to a DEST reference number for the cases where a fact code relates to DEST Highest Education Attainment information.
Country Map	SAD_TAC_MAP_CNT	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Country Map	Map TAC country codes to the PeopleSoft equivalent country field.
State Code Map	SAD_TAC_MAP_ST	Set Up SACR, Product Related, Recruiting and Admissions, TAC, State Code Map	Map TAC state codes to the PeopleSoft equivalent state field.
Organization Table	EXT_ORG_TABLE	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Organization Table	Enter external organizations codes into the system for posting applicants' external education data and the last school attended. Education data may include an applicant's qualifications.
School Subject Maintenance	SCHOOL_SUBJECTS	Campus Community, Organization, Create/Maintain Organizations, School Subject Maintenance	Define academic subjects for the external organizations.
External Organization Map	SAD_TAC_MAP_EXT	Set Up SACR, Product Related, Recruiting and Admissions, TAC, External Organization Map	Map year 12 types, TAC external institutions, origin of qualification values, and subject codes to the external organizations.
Qualification Level Map	SAD_TAC_MAP_QUAL	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Qualification Level Map	Map TAC qualification level codes to PeopleSoft external academic level codes.

Page Name	Definition Name	Navigation	Usage
Name Prefix Map	SAD_TAC_MAP_PFX	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Name Prefix Map	Map TAC prefixes (MR, MISS, and MS) to general system name prefixes.
Program Action Reason Table	PROG_RSN_TBL	Set Up SACR, Product Related, Student Records, Program Action, Program Action Reason Table	Add program action reasons for the program action of <i>Admit</i> . The TAC Load process assigns these program action reasons to applicants based on the Basis of Admission mapping.
Basis of Admission Map	SAD_TAC_MAP_BOA	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Basis of Admission Map	Map <i>Admit</i> program action reasons to the Basis of Admission codes provided by the TAC.
Admit Type Map	SAD_TAC_MAP_ADM	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Admit Type Map	Associate admit types with basis of admission values.
Citizenship Map	SAD_TAC_MAP_CIT	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Citizenship Map	Map TAC citizenship codes to the citizenship statuses set up for the country AUS and residency codes.
Ethnicity Map	SAD_ETHNICITY_MAP	Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Ethnicity Mapping	Map the DEST ethnicity values (Aboriginal or Torres Strait Islander codes related to DEST Element 316) to the corresponding ethnic groups set up for regulatory region AUS.
DEEWR Language Table	SSR_LANG_DEST	Set Up SACR, Product Related, Student Records, Enrolment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Table	Map language codes to DEEWR language codes.
Offer Period Mapping	SAD_TAC_MAP_OFR	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Offer Period Mapping	Map the Offering Month and Year provided in the TAC File to an admit term.
Honors Category Map	SAD_TAC_MAP_HONOUR	Set Up SACR, Product Related, Recruiting and Admissions, TAC, Honors Category Map	Map an honors category to the TAC Honours value provided in the qualification file.

Setting Up TAC Test IDs

Access the Test Tables page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Test Tables).

Test Tables

Test ID:QTAC

Find | View All

First1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Queensland Tertiary Admission

Short Description:QTAC

Testing Agency:

Find | View All

First1 of 1Last

*Component	*Description	*Short Desc	Min Score	Max Score	Subtest
			0.00	0.00	

Test Tables page

Add a test ID for all applicable TACs.

Assigning TAC Test ID Security

Access the Test ID Security page (Set Up SACR, Security, Secure Student Administration, User ID, Test ID Security).

Test ID Security

User ID:SATRN15

Find

First1-2 of 2Last

*Test ID

*Access Code

VTAC

Victoria Tertiary Adm Centre

Read/Write

All Access

*Test ID

*Access Code

SATAC

South Aus Tertiary Adm Centre

Read/Write

Test ID Security page

Assign the TAC test IDs that a user can access. The system enforces test ID security in several components throughout the system.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions," Setting Security for Test IDs

Setting Up TAC Test ID Mapping Rules

Access the External Test Score Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, External Test Score Mapping).

External Test Score Mapping

PeopleSoft Test Code QTC Queensland Tertiary Admissions

Mapping
[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1 of 1 ▶ Last

Test ID			
QTAC		Queensland Tertiary Admission	+ -

Suspense Records

[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1-4 of 4 ▶ Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SUS_ANZ	TAC Suspense Table	☒	+	-
SAD_TC_SFCT_ANZ	TAC Suspense FACT Code Table	☐	+	-
SAD_TC_SQUL_ANZ	TAC Suspense Quals Table	☐	+	-
SAD_TC_SSBj_ANZ	TAC Suspense Subject Table	☐	+	-

Candidate Data Records

[Customize](#) | [Find](#) | [View All](#) |
First ◀ 1-4 of 4 ▶ Last

Record (Table) Name	Record Description	Primary		
SAD_TAC_SPS_ANZ	TAC Student Profile Table	☒	+	-
SAD_TC_FCT_ANZ	TAC Student Profile FACT Table	☐	+	-
SAD_TC_QUAL_ANZ	TAC Student Prof Quals Table	☐	+	-
SAD_TC_SBJ_ANZ	TAC Main Subject Table	☐	+	-

External Test Score Mapping page

Test ID

Enter a TAC test ID for each PeopleSoft TAC test code. The PeopleSoft system delivers the following TAC test codes: QTC, VTC, UAC, and STC

Note. On this page, you only have to enter a TAC test ID that corresponds to a PeopleSoft test code. The PeopleSoft system delivers the rest of the page complete. It is important that all TAC test IDs you have defined are mapped to a PeopleSoft test code or you will not be able to load TAC data.

Setting Up TAC Program Codes

Access the Program Code Table page (Set Up SACR, Foundation Tables, Reporting Codes, Program Code Table AUS).

Program Code Table

Program Code:3502

Find | View All

First1 of 1Last

Effective Date:01/01/1900

Status:Active

*Description:Bachelor of Commerce

Short Description:B Com

Program Code Table page

Set up program codes that map to course codes in the TAC input files.

Mapping TAC Program Codes to Academic Programs

Access the Acad Prog AUS page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Acad Prog AUS).

Taxonomy/Campus		Repeat/Incomplete		Enrollment		Course		Dynamic Date		Acad Prog AUS	
Academic Institution:		PSAUS PeopleSoft Australia Uni									
Academic Program:		BCOM Bachelor of Commerce									
Find View All First ◀ 1 of 2 ▶ Last											
Effective Date:		01/01/2005		Status:		Active					
*Field of Study:		040301 🔍		Economics							
Field of Education Code:		080301 🔍		Business Management							
Program Type Code:		10 🔍		Bachelor's Pass							
Special Program Type:		00 🔍		Not Course of Special Interest							
Aggregated EFTSL:		30 🔍		3 Years							
Minimum Units:		360.00									
Program Eligibility:											
CRICOS Code:											
☐ Combined Course Indicator											
DEST Related Programs Customize Find First ◀ 1 of 1 ▶ Last											
		Related Academic Program				*Status					
1		🔍				Active		+ -			

Acad Prog AUS (academic program Australia) page (1 of 2)

TAC Program Mapping		Find View All		First ◀ 3 of 8 ▶ Last	
Program Code:	3502 🔍	Bachelor of Commerce			
TAC Stream Code:					
Academic Load:	Full-Time				
Academic Plan:	ACCOUNTING 🔍	Accounting			
Mode of Attendance:	Internal Mode of Attendance				
Campus:	MAIN 🔍	Main Campus			

Acad Prog AUS (academic program Australia) page (2 of 2)

Program Code

Associate a TAC program code with an academic program that your institution offers. TAC program codes can be mapped to only one academic program.

TAC Stream Code

Applicable to only SATAC and VTAC.

Academic Load	Enter the academic load that the TAC Load process assigns to the admission applications for the program.
Academic Plan	Enter the academic plan that the TAC Load process assigns to the admission applications for the program.
Mode of Attendance	Enter the mode of attendance that the TAC Load process assigns to the admission applications for the program.
Campus	Enter the campus that the TAC Load process assigns to the admission applications for the program.

Associating FACT Codes with DEST Reference Numbers

Access the DEST Number Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, DEST Number Map).

DEST Number Map

[Customize](#) | [Find](#) | [View All](#) |

First 1-8 of 8 Last

	*DEST Reference Number	*Fact Code		
1	DESTQ1	D_Q1		
2	DESTQ2	D_Q2		
3	DESTQ3	D_Q3		
4	DESTQ4	D_Q4		
5	DESTQ5	D_Q5		
6	DESTQ6	D_Q6		
7	DESTQ7	D_Q7		
8	DESTQ8	D_Q8		

DEST Number Map page

For TACs that provide prior education data as FACT codes, associate a FACT code with the applicable DEST reference number. The system uses the DEST reference number and Fact code mapping to report highest education attainment so that DEST can track the applicant's prior educational details. The following table lists the DEST reference numbers:

DEST Reference Number	Description
1	Post Graduate Program
2	Degree Program
3	Sub Degree Program

<i>DEST Reference Number</i>	<i>Description</i>
4	VET Sub Degree Program
5	VET Award Program
6	VET Secondary Program
7	School Secondary Program
8	Other Program

You can set up FACT codes that are not associated with the applicant's prior education data. In this case, the DEST reference number for these FACT codes must be set to *Not DEST*. The *Not DEST* mapping setup is optional, and the system uses this setup for its internal processes.

The TAC Load process posts all FACT codes into suspense records. These codes form a part of the candidate data records after the application is posted, regardless of whether the configuration for these codes is maintained on the DEST Number Map page. The system posts the prior education data into the PeopleSoft database *only* if you have mapped the DEST numbers on the DEST Number Map page.

Note. SATAC provides the prior education data in the applicant file, *not* the FACT file. Therefore, DEST number mapping is optional for SATAC.

To view the student DEST information after you import the TAC data, select Campus Community, Personal Information, Biographical, Personal Attributes, Student Data AUS.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing Biographical Information," (AUS) Entering Student Data

Mapping TAC Country Codes

Access the Country Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Country Map).



Country Map			
Customize Find View All [Grid Icon]			
First [Left Arrow] 1 of 1 [Right Arrow] Last			
	TAC Country Code	*Country	Description
1	1100	AUS	Australia

Country Map page

Enter the TAC country code that you want to associate with each PeopleSoft country code. The TAC Load process uses this mapping to load the data listed in the following table:

<i>Data</i>	<i>Supplied by QTAC</i>	<i>Supplied by UAC</i>	<i>Supplied by SATAC</i>	<i>Supplied by VTAC</i>
Country of Address	Yes	Yes	Yes	Yes
Country of Birth	No	Yes	Yes	Yes
Country of Citizenship	No	No	Yes	No

Note that for VTAC you must have a row in which TAC Country Code *AUSTRALIA* maps to Country code *AUS*. This mapping is required so that the TAC Load process can load the VTAC residential and postal address data that do not have a country value.

Mapping TAC State Codes

Access the State Code Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, State Code Map).

State Code Map
Customize | Find | View All | First

	*TAC State Code	*Country	Description	*State	Description
1	QLD	AUS	Australia	QLD	Queensland

State Code Map page

Enter the TAC state code that you want to associate with each PeopleSoft state code. The TAC Load process uses this mapping to identify the state values in applicant address data.

Adding Organization Values

Access the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Organization Table).

Organization Table | Primary Contact and Dept | School Data | Vendor Information | BPV Organization Data NLD

External Org ID: QLD

Organization Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Queensland

Long Description: Queensland

Short Description: Queensland ☐ Offers Courses

*Organization Type: School *Proprietorship: Public

Primary Location

Location:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City: State / Province:

Postal: Country:

EDI Address:

URL Address:

Organization Table page

Add external organization codes that represent the applicants' schools. The TAC Load process uses the organization codes to post applicant's external education and last school attended data.

You must add the following organization codes if you want to import VTAC files:

Organization Code	Description
NON VIC SCH	Add this organization code for non-Victorian secondary school qualification records in the VTAC offer file. If you add this organization code, the TAC Load process assumes the external organization code as <i>NON VIC SCH</i> for qualifications where the School Code is blank.
EXT INSTITN	Add this organization code if you do not want to configure an external organization for each institution that may exist in the overseas qualifications data. If the TAC Load process does not find a mapping between the TAC External Institution Name and an external organization on the External Organization Map page and you have added EXT INSTITN as an organization code, the process assumes EXT INSTITN as the organization code for the post-secondary level overseas qualifications.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Adding Organizations to Your Database"

Defining TAC Subjects

Access the School Subject Maintenance page (Campus Community, Organization, Create/Maintain Organizations, School Subject Maintenance).

School Subject Maintenance

Org ID:QLDQueensland

School Subject

Find | View 1First1-4 of 4Last

*School Subject:ACCTAccounting

School Subject Details

FindFirst1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Accounting

Short Description:Accounting

*External Subject Area:ACCTAccounting

*School Subject:ECONEconomics

School Subject Details

FindFirst1 of 1Last

*Effective Date:01/01/1900

*Status:Active

*Description:Economics

Short Description:Economics

*External Subject Area:ECONEconomics

School Subject Maintenance page (1 of 2)

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*School Subject:		BIOL		Biology		
School Subject Details				Find	First	1 of 1 Last
*Effective Date:	01/01/1900		*Status:	Active		
*Description:	Biology					
Short Description:	Biology					
*External Subject Area:	BIOL		Biology			

*School Subject:		ENGL		English		
School Subject Details				Find	First	1 of 1 Last
*Effective Date:	01/01/1900		*Status:	Active		
*Description:	English					
Short Description:	English					
*External Subject Area:	ENGL		English			

School Subject Maintenance page (2 of 2)

Enter the TAC subject codes and subject code details that you want to associate with each external organization.

Mapping External Organization Values

Access the External Organization Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, External Organization Map).

External Organization Map

External Org ID: QLD Queensland

Year 12 Type Find | View All First 1 of 1 Last

*TAC Course Code: SEC-QLD-SEP + -

External Institution Find | View All First 1 of 1 Last

*TAC External Institution Name: + -

Origin of Qualification Find | View All First 1 of 1 Last

*TAC Origin of Qualification: QLD + -

Subject Code Mapping Customize | Find | View All First 1-3 of 3 Last

	*Subject Code	*School Subject	Description		
1	0060	BUSN	Business	+	-
2	0001	ENGL	English	+	-
3	0037	MATH	Mathematics	+	-

External Organization Map page

Year 12 Type

Enter the valid year 12 course codes for this organization. This data corresponds to the year 12 type in the applicant subject file for QTAC.

External Institution

Use this field for VTAC when you want to map overseas institution names to a specific external organization ID. VTAC data related to the Overseas Post Secondary Qualifications contain only an overseas institution name; this field allows you to map an overseas institution to an external organization ID.

You must set up an organization ID with a value of *EXT INSTITN* if you do not want to maintain separate organization IDs for the overseas institutions that may exist in the VTAC overseas qualifications data. If the external institution and external organization ID mapping does not exist, the TAC Load process assigns *EXT INSTITN* as the external organization ID for the overseas qualifications.

Origin of Qualification

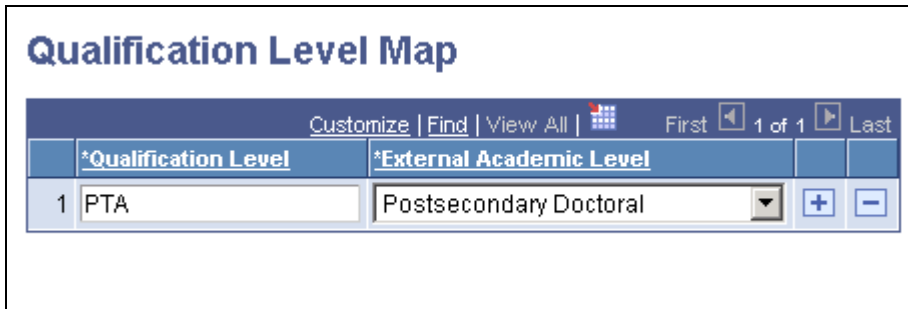
Map origin of qualification values to the external organization. The values that you enter here correspond to the origin of qualification values in the application qualification file for QTAC and UAC.

Subject Code Mapping

Map TAC subject codes to the school subjects of the external organization.

Mapping TAC Qualification Levels

Access the Qualification Level Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Qualification Level Map).



The screenshot shows the 'Qualification Level Map' page. It has a title bar with 'Qualification Level Map' and navigation links: 'Customize', 'Find', 'View All', and a grid icon. Below the title bar is a table with two columns: '*Qualification Level' and '*External Academic Level'. The first row shows '1' in the first column, 'PTA' in the second column, and 'Postsecondary Doctoral' in the third column. There are '+' and '-' buttons to the right of the third column.

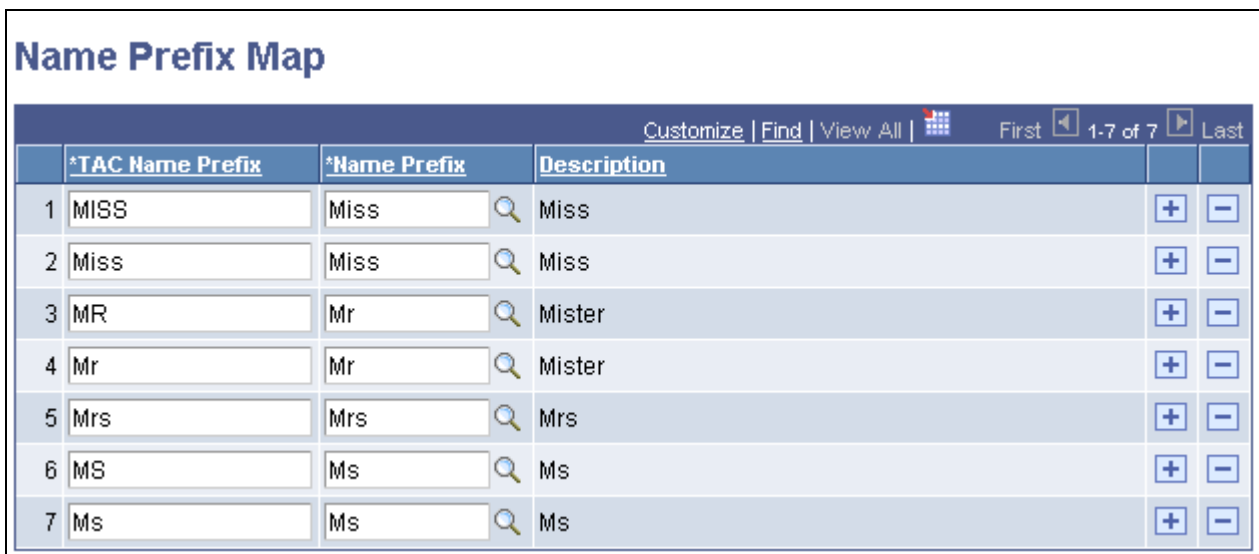
	*Qualification Level	*External Academic Level		
1	PTA	Postsecondary Doctoral	+	-

Qualification Level Map page

Map TAC qualification level codes to PeopleSoft external academic level codes.

Mapping TAC Prefixes

Access the Name Prefix Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Name Prefix Map).



The screenshot shows the 'Name Prefix Map' page. It has a title bar with 'Name Prefix Map' and navigation links: 'Customize', 'Find', 'View All', and a grid icon. Below the title bar is a table with four columns: '*TAC Name Prefix', '*Name Prefix', 'Description', and two empty columns. The first row shows '1' in the first column, 'MISS' in the second column, 'Miss' in the third column, and 'Miss' in the fourth column. There are '+' and '-' buttons to the right of the fourth column. The table contains 7 rows of data.

	*TAC Name Prefix	*Name Prefix	Description		
1	MISS	Miss	Miss	+	-
2	Miss	Miss	Miss	+	-
3	MR	Mr	Mister	+	-
4	Mr	Mr	Mister	+	-
5	Mrs	Mrs	Mrs	+	-
6	MS	Ms	Ms	+	-
7	Ms	Ms	Ms	+	-

Name Prefix Map page

Enter the TAC name prefix that you want to associate with each PeopleSoft prefix.

VTAC does not provide name prefixes. Therefore, for VTAC, the TAC Run Search/Match Post process automatically inserts a name prefix of *Mr* if the applicant gender is Male and *Ms* if the applicant gender is female. The TAC Load process does not log any messages related to name prefix mapping because VTAC does not provide the name prefix in its load file.

Defining a Program Action Reason

Access the Program Action Reason Table page (Set Up SACR, Product Related, Student Records, Program Action, Program Action Reason Table).

Program Action Reason Table

SetID: PSAUS

Program Action: ADMT Admit

Action Reason: 37

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Professional Qualification

Short Description: Profession

Program Action Reason Table page

Map program action reason codes to the program action of *Admit*.

VTAC does not provide a basis of admission. For VTAC, define a program action reason *OFFR* so that the TAC Load process can assign the program action reason *OFFR* to the applications with admission offers.

Mapping Basis of Admissions Values

Access the Basis of Admission Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Basis of Admission Map).

Basis of Admission Map

SetID: PSAUS

Customize | Find | View All | First 1-5 of 5 Last

	*Basis of Admission	*Action Reason	Description		
1	12	29	Other Basis		
2	22	29	Other Basis		
3	14	33	Secondary Education		
4	15	33	Secondary Education		
5	37	37	Professional Qualification		

Basis of Admission Map page

Map the basis of admission values provided by TAC to the action reasons you defined on the Program Action Reason Table page. The TAC Load process uses this mapping to insert the action reasons into admission applications. Additionally, the PeopleSoft DEST reporting processes use the action reasons to report Element 327 - Basis for Admission to Current Courses.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "(AUS) Generating Government Reports"

Mapping TAC Admit Type Values

Access the Admit Type Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Admit Type Map).

Admit Type Map

Institution: PSAUS PeopleSoft Australia Uni

Customize Find View All  First 1-4 of 4 Last					
	*Basis of Admission	*Admit Type		Description	
1	29	FYR		1st Year	+ -
2	31	FYR		1st Year	+ -
3	33	FYR		1st Year	+ -
4	37	FYR		1st Year	+ -

Admit Type Map page

For SATAC, map external basis of admission codes to admit type values.

Mapping TAC Citizenship Codes

Access the Citizenship Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Citizenship Map).

Citizenship Map

Customize Find View All  First 1-2 of 2 Last					
	*TAC Citizenship Code	*Citizenship Status	Residency	Description	
1	Australian	Citizen	AUS 	Australian Resident	+ -
2	New Zealand	Citizen	NZL 	New Zealand Resident	+ -

Citizenship Map page

Define citizenship mapping rules to map TAC citizenship codes to citizenship statuses and PeopleSoft residency codes.

Mapping Ethnicity

Access the Ethnicity Map page (Set Up SACR, Product Related, Recruiting and Admissions, External Test Scores, Ethnicity Mapping).

Ethnicity Map

Test ID: UAC New South Wales

*Regulatory Region: AUS Australia

Customize | Find | View All | First 1-3 of 3 Last

	Ethnic Group	Description	Ethnicity		
1	ABRGL	Aboriginal	3	+	-
2	ABTRRS	Aboriginal and Torres Strait Islander	5	+	-
3	TORRES	Torres Strait Islander	4	+	-

Ethnicity Map page

The TAC Load process uses this mapping to associate UAC FACT Codes to applicants. UAC FACT Codes provide information about an applicant's Aboriginal and Torres Strait Island origin.

The PeopleSoft DEST reporting processes use the ethnicity codes to report DEST Element 316.

The following table shows the required mapping for UAC.

<i>Ethnic Group</i>	<i>Ethnicity Code</i>
Aboriginal	3
Torres Strait Islander	4
Aboriginal and Torres Strait Islander	5

The following table shows the required mapping for VTAC.

<i>Ethnic Group</i>	<i>Ethnicity Code</i>
Caucasian	2
Aboriginal	3
Torres Strait Islander	4
Aboriginal and Torres Strait Islander	5

The TAC load process uses this VTAC mapping to load the ethnic code from the VTAC *Aboriginal and Torres Strait Islander* offer file element.

Language Mapping

Access the DEEWR Language Table page (Set Up SACR, Product Related, Student Records, Enrolment Reporting Codes, AUS Regulatory Report Setup, DEEWR Language Table).

DEEWR Language Table

Institution: PSAUS PeopleSoft Australia Uni

Effective Date: 01/01/2000

Customize Find View All  First 1-7 of 7 Last					
Language Code		DEEWR Language Code			
BO 	Bengali	5201 	Bengali		
CM 	Chinese (Mandarin)	7104 	Mandarin		
EN 	English	0001 	English		
KO 	Korean	7301 	Korean		
PO 	Portuguese	0060 	Portuguese		
RU 	Russian	3402 	Russian		
SI 	Swahili	5202 	Gujarati		

DEEWR Language Table page

Map DEEWR language codes to the PeopleSoft language codes. The DEEWR language codes must be the same as the *Language Spoken at Home* values in the TAC load file. The TAC Load process uses this mapping to load the PeopleSoft language code in the TAC suspense component (for example, the TAC load process loads *RU* when it finds *3402* for an applicant in a TAC file). The DEST reporting processes use this mapping to report the DEST language code for element 348 (for example, the DEST reporting processes include *3402* in the extract file when it finds an applicant with a *RU* value in your database).

Mapping Offer Period

Access the Offer Period Mapping page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Offer Period Mapping).

Offer Period Mapping

Academic Institution: PSAUS PeopleSoft Australia Uni

TAC Code: QTAC

Academic Career: UGRD Undergraduate

Admit Term: 0641 2010 Sem1

Entry Year and Month		Customize Find View All 	First 	1-3 of 3 	Last
	*Offer Year	*Offer Month			
1	2010	FEB			
2	2010	JAN			
3	2010	MAR			

Offer Period Mapping page

You must have a offer period mapping record for each career and admit term combination.

Copy from Career Copy a offer period mapping record of a career. The system displays the Copy from Career field when you enter the page on an add mode.

Offer Year and Offer Month You must enter all the possible offering year and month combinations that may be provided in a TAC file relevant to the career and admit term.

When a QTAC File is posted, the TAC Search/Match/Post process will assign the admit term according to the offering year and month mapping for the career applicable to the applicant's program. If there is no mapping for the year and month combination, the admit term on the run control will be assigned.

Note. This logic is relevant to only QTAC. For UAC, SATAC and VTAC the system assigns the admit term directly from the TAC load files.

Mapping Honors Category

Access the Honors Category Map page (Set Up SACR, Product Related, Recruiting and Admissions, TAC, Honors Category Map).

Honors Category Map

Academic Institution: PSAUS PeopleSoft Australia Uni

Honors Mapping					Customize Find View All  First 1-4 of 4 Last	
	TAC Honors Code	Honors Category	Description			
1	1	Summa	Summa Cum Laude	+	-	
2	2A	Magna	Magna Cum Laude	+	-	
3	3	Laude	Cum Laude	+	-	
4	N	None	None	+	-	

Honors Category Map

TAC Honors Code Enter the honors code provided in the TAC Qualifications file.

Honors Category Enter the PeopleSoft honors category applicable to the TAC honours code.

Note. You should perform this mapping only if you are loading QTAC data.

Processing TAC Loads

This section provides an overview of TAC processing and discusses how to set up load parameters and load the file.

Understanding TAC Data Load Processing

Recruiting and Admissions supports loading the data files received from the following TACs: QTAC, SATAC, UAC, and VTAC. The data files contain personal information, previous education data, year 12 results, and details of offer or preferences. For each TAC, you first load data into suspense tables. Then run the search/match process to verify whether there is an existing record for the applicant in the system. Finally, post the bio/demo and remaining applicant data to your database. The Search/Match/Post process posts self-reported academic information to TAC candidate data tables so that the system maintains the history of data provided with the application. You follow this process for each TAC.

Regardless of the TAC, the same components are used to load, view, post, and purge TAC data. The test ID of the TAC you are processing must be entered on each component. The entry of the TAC test ID determines which fields appear on each page. The TAC test IDs shown in the prompt are based on your TAC test ID security. You must have test ID security defined in order to process TAC data loads.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Recruiting and Admissions," Setting Security for Test IDs.

To process TAC data:

1. Use the TAC Load process to load the TAC data from one or more files in your directory into the suspense tables.
2. Review and edit the data that you loaded in suspense pages.

Correct all load errors before moving on to the next step. In the search page of the TAC Suspense component, enter the TAC test ID, *Error*, in the Edit Processing Option field and click the Search button. Access each suspense record and correct the errors until every suspense record has a value of *Complete* (rather than *Error*) in the Edit field on the Process Options page.

3. After you have corrected all of the load errors, run the search/match/post process.

This process looks for data in your database, based on search parameters that you define on the search/match criteria pages, that matches the data that you are posting. For a set of parameters that suggest only a possible match (such as name and gender, for example), the process will not post the record until you can manually determine which records are actually duplicates.

4. Access each suspense record that did not get posted to confirm the appropriate post action to assign to the applicant.

In the search page of the TAC Suspense component, enter the TAC test ID, *Complete* in the Edit Processing Option field and *Perform* in the Search/Match Processing Option field. Then click the Search button. The search process finds only those suspense records that went through the search/match/post process but do not have a post processing option of *New ID Add* or *Update ID*. The reason the search/match/post process does not assign a *New ID Add* or *Update ID* post processing option is because of the settings on the Search Params page. If the system finds multiple or partial matches for applicants and the setting for these matches are set to suspend, you must manually determine whether to post or ignore these applicant records. After you access the TAC Suspense component, find the parameters for which the process identified a match, then use Search/Match to look up the bio/demo information that matches the suspense record and verify whether a person in the incoming data already exists in the system. Then, specify whether you want the search/match/post process to add the bio/demo and TAC record to your database, update an existing record, or ignore the suspense record altogether.

5. Run the search/match/post process again.

The process posts the suspense records that you manually tagged to post. In addition, the process posts the suspense records that went through the Search/Match process and are ready to be posted. By this time, all of your suspense records should be posted to your database. When a record posts to your database, the search/match/post process assigns an ID to the applicant. To view an applicant's ID, select Student Admissions, TAC Processing, TAC Suspense, Personal Information, or Student Admissions, TAC Processing, TAC Candidate Data, Personal Information.

6. Purge the suspense tables.

You should purge the suspense tables as soon as all of the suspense records are posted to the database.

7. Review TAC Candidate Data. (optional)

After the system posts the TAC application data, you can view this data on the TAC Candidate Data component.

Page Used to Load TAC Data

Page Name	Definition Name	Navigation	Usage
TAC Load	SAD_TAC_LOAD_RUN	Student Admissions, TAC Processing, TAC Load	Specify a TAC test ID and designate the directory location for each of the TAC files. Run the load process. Note. You should complete the full loading, search/match and posting process before loading a new set of data. If you have TAC loads waiting to be processed, do not load a new TAC file until you have processed the data in your suspense files.

Setting Up Load Parameters and Loading the File

Access the TAC Load page (Student Admissions, TAC Processing, TAC Load).

TAC Load

Run Control ID: QTAC [Report Manager](#) [Process Monitor](#) [Run](#)

Test ID: Queensland Tertiary Admission

Parameters

Academic Institution: PeopleSoft Australia Uni

Date Loaded:

File Input Path #1:

File Input Path #2:

File Input Path #3:

File Input Path #4:

TAC Load page

The number of input files that you can use depends on the TAC test ID that you enter. For example, the TAC Load page displays five file input fields for UAC and thirteen file input fields for SATAC.

This is an example of the TAC Load page for UAC:

TAC Load

Run Control ID: UAC

[Report Manager](#)[Process Monitor](#)

Run

Test ID:

UAC

 New South Wales

Parameters

Academic Institution:

PSAUS

 PeopleSoft Australia Uni

Date Loaded:

12/12/2007



File Input Path #1:

c:\tacluac1app.txt

File Input Path #2:

c:\tacluac2fact.txt

File Input Path #3:

c:\tacluac3qual.txt

File Input Path #4:

c:\tacluac4subj.txt

File Input Path #5:

c:\tacluac5pref.txt

Example of TAC Load page for UAC

This is an example of the TAC Load page for SATAC:

TAC Load

Run Control ID: SATAC [Report Manager](#) [Process Monitor](#) Run

Test ID: South Aus Tertiary Adm Centre

Parameters

Academic Institution:	PSAUS PeopleSoft Australia Uni
Admit Type:	TAC TAC Applicant
Date Loaded:	12/12/2007
Initial Course Character:	1
☒ Offers?	
File Input Path #1:	c:\tact\SATAC_app1.bt
File Input Path #2:	c:\tact\SATAC_qual2.bt
File Input Path #3:	c:\tact\SATAC_oqui3.bt
File Input Path #4:	c:\tact\SATAC_empl4.bt
File Input Path #5:	c:\tact\SATAC_subj5.bt
File Input Path #6:	c:\tact\SATAC_pref6.bt
File Input Path #7:	c:\tact\SATAC_pcrs7.bt
File Input Path #8:	c:\tact\SATAC_fact8.bt
File Input Path #9:	c:\tact\SATAC_ospr9.bt
File Input Path #10:	c:\tact\SATAC_rorg10.bt
File Input Path #11:	c:\tact\SATAC_rschr11.bt
File Input Path #12:	c:\tact\SATAC_remp12.bt
File Input Path #13:	c:\tact\SATAC_heim13.bt

Example of TAC Load page for SATAC

This is an example of the TAC Load page for VTAC:

TAC Load

Run Control ID: VTAC [Report Manager](#) [Process Monitor](#) Run

Test ID: Victoria Tertiary Adm Centre

Parameters

Academic Institution: PeopleSoft Australia Uni

Admit Type: TAC Applicant

Date Loaded:

*Processing Indicator:

File Input Path #1:

Example of TAC Load page for VTAC

The following table indicates the type of data you must load with the various File Input Path fields.

File Number	QTAC	UAC	SATAC	VTAC
File Input Path # 1	Applicant	Applicant	Applicant	Offer File
File Input Path # 2	FACT	FACT	Academic Qualifications	
File Input Path # 3	Qualifications	Qualifications	Other Qualifications	
File Input Path # 4	Subject	Subject	Employment Qualifications	
File Input Path # 5		Preferences	Year 12 Subjects	
File Input Path # 6			Preferences	
File Input Path # 7			Preference Course Rank Set	
File Input Path # 8			FACT	
File Input Path # 9			International Applicants Personal Additional Data	
File Input Path # 10			Origin Codes	
File Input Path # 11			Year 12 School Codes	

File Number	QTAC	UAC	SATAC	VTAC
File Input Path # 12			Employment and Occupation Codes	
File Input Path # 13			HEIMS	

Test ID	Enter the TAC test ID that you want to load. Define TAC test ID values on the Test Tables page. Once the TAC test ID is entered, the additional fields specific to the TAC will appear. You must have test ID security established in order to select a value. This field is required.
Academic Institution	Enter the institution for which you want to load the data.
Admit Type	Applicable to only SATAC and VTAC. Enter a value only if applicants do not have an admission offer (basis of admission).
Date Loaded	Enter the date of the data load process. The system populates this field to the current date by default.
Processing Indicator	Applicable to only VTAC. Select a value applicable to the offer file that you want to load. You must select <i>Undergrad</i> for an undergraduate offer file and <i>Graduate</i> for an offer file that contains postgraduate applicant records.
Initial Course Character	Applicable to only SATAC. Use to filter and load preferences relevant to your institution. The TAC Load process selects only those courses from the preferences file that commence with the character that you enter in this field.
Offers	Applicable to only SATAC. Select to load only those courses from the preferences file that TAC has offered to the applicants If you do not select this check box, the TAC Load process loads all the preferences depending on the Initial Course Character value.
File Input Path	Enter the path of the directory and file where the TAC data resides. These fields are required. How you complete the fields depends on the TAC you are processing. In order for the upload to work correctly, you must list the input files in the correct order.
Run	Click the run button to run the SAD_TAC_LOAD Application Engine process at user-defined intervals.

Note. To check for errors during the program run, review the trace file created by the Application Engine program. Nonfatal errors will appear in the Error Indicators group box in the TAC Suspense component.

Reviewing and Editing Data in the Suspense Record

This section provides an overview of the suspense phase and discusses how to:

- Review process options.
- Review personal information.
- Review and edit data in the suspense record.

Understanding, Correcting, and Editing Suspense Data

Before entering the TAC Suspense component, you must enter the TAC test ID. The pages in the component dynamically appear based on the TAC test ID you enter. The pages in the component are very similar in the way they look and work. For example, every suspense component has a Personal Information page. In addition, they all share the first page – Process Options. Many of the values and codes that appear in the suspense component are based on values and codes that the TAC defines. Contact the TAC that manages the application for full descriptions of the data that appears in these pages or refer to the data layouts you receive from the TAC.

Note. Data in suspense tables does not affect tables in your database until you post the data. In addition, if you find an error in the suspense component after you post the data, you have to go to the appropriate page in your database to make any changes. For example, if you find an error on the Personal Information page in the Suspense component, you have to go to the Add/Update a Person component to correct the error.

Pages Used to Review and Edit Suspense Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Options	SAD_TAC_SUS_PROC	Student Admissions, TAC Processing, TAC Suspense, TAC Suspense, Process Options	Review the status of a TAC record regarding the loading, search/match, and posting processing. For example, determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors or warnings were encountered during the load or search/match/post processes.

Page Name	Definition Name	Navigation	Usage
Personal Information	SAD_TAC_SUS_BIO	Student Admissions, TAC Processing, TAC Suspense, Personal Information	Review and edit the student's personal information in the suspense record. Refer to the data layouts from the TAC to determine the fields that the load process will populate. Each TAC has a Personal Information page. The data will vary depending on the TAC.
Address	SAD_TAC_SUS_ADDR	Student Admissions, TAC Processing, TAC Suspense, Address	This page appears only when the TAC applicant file contains more than one address. Review and edit the address information for the applicant, if necessary. Note that country and state code mappings are required for loading address data.
Qualifications	SAD_TAC_SUS_QLSA	Student Admissions, TAC Processing, TAC Suspense, Qualifications	Review and edit detailed information about the student's qualifications. These details populate the external education data as part of the posting process.
Subjects	SAD_TAC_SUS_SBJSA	Student Admissions, TAC Processing, TAC Suspense, Subjects	Review and edit information about subject courses taken by the student. This data populates external education data as part of the posting process.
Offers	SAD_TAC_SUS_OFFER	Student Admissions, TAC Processing, TAC Suspense, Offers	Review and edit basic applicant and offer details. The data from this page is used during the posting process to populate admission applicant data and admission applicant program data.
Fact	SAD_TAC_SUS_FACT	Student Admissions, TAC Processing, TAC Suspense, Fact	Review and edit information about the Fact codes and values. These Fact codes contain data for DEST statistical reporting and other items specific to the TAC or institution or both.

Page Name	Definition Name	Navigation	Usage
Residency	SAD_TAC_SUS_RES	Student Admissions, TAC Processing, TAC Suspense, Residency	Review and edit residency details and additional DEST reporting fields about the student. Data from this page is used to populate residency and DEST reporting fields as part of the posting process.
Preferences	SAD_TAC_SUS_PRFS	Student Admissions, TAC Processing, TAC Suspense, Preferences	Review and edit information about applicant preferences. The data from this page is used during the posting process to populate the applicant program data table.
VIC Data	SAD_TAC_SUS_VIC_O2	Student Admissions, TAC Processing, TAC Suspense, VIC Data	Review and edit biographical and demographic information for this student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_SUS_CAT	Student Admissions, TAC Processing, TAC Suspense, Common Assessment Tasks	Review and edit information about the Common Assessment Tasks for applicants from the Victorian TAC.
VIC Results	SAD_TAC_SUS_VIC_RS	Student Admissions, TAC Processing, TAC Suspense, VIC Results	Review and edit information about result summaries for applicants from the Victorian TAC.
VCAL Studies	SAD_TAC_SUS_VCL	Student Admissions, TAC Processing, TAC Suspense, VCAL Studies	Review and edit information about VCAL studies for applicants from the Victorian TAC
VCAL Units	SAD_TAC_SUS_VCU	Student Admissions, TAC Processing, TAC Suspense, VCAL Units	Review and edit information about VCAL units for applicants from the Victorian TAC.
Assessment Data	SAD_TAC_SUS_VIC_AS	Student Admissions, TAC Processing, TAC Suspense, Assessment Data	Review and edit information about assessment data related to graduate entry teaching for applicants from the Victorian TAC.

Page Name	Definition Name	Navigation	Usage
PCRS (preference course rank set)	SAD_TAC_SUS_PCRSA	Student Admissions, TAC Processing, TAC Suspense, PCRS	The data on this page is internal to the way students' eligibility rankings are determined. South Australian institutions can refer to this data.

Reviewing Process Options

Access the Process Options page (Student Admissions, TAC Processing, TAC Suspense, TAC Suspense, Process Options).

Process Options		Personal Information	Qualifications	Subjects	Offers	Fact
Last Name:	Xthomas	External Application Nbr:	261001541			
First Name:	Leona	Date Loaded:	07/11/2006			
Middle Name:	Maureen Dhu	Test ID:	QTAC			
Processing Options						
Edit:	Complete	Search:	Complete	Post:	Purge	
Search / Match Results						
Order Number:	30	Matches:	3			
Messages						
		Customize		Find	View All	First 1-3 of 3 Last
Messages	Information					
Message Severity	Message Text	Description	Comments			
1 Message	Postal code not able to be mapped to Region		Postal code not able to be mapped to Region (14902,107)			
2 Message	The Student has been determined this student to be 'NEW'.		The record has been determined to be a "NEW" record.			
3 Message	No School Code was provided		No School Code was provided (14902,130)			

Process Options page

This page provides the status of a suspense record regarding the loading, search/match and posting processes. Any informational and error messages that TAC data load and search/match/post processes generate appear on this page. You can use this page to keep current on the status of an individual's TAC processing. These messages can serve historical and analytical purposes, giving you a picture of the kinds of errors encountered in your TAC processing. To do so, you would need to wait to purge your TAC messages until you have completed your analysis.

Processing Options

Edit

Displays the status of the record regarding the Load External Data process. Values are:

Complete: The program was able to process the record without a problem.

Error: The program encountered problems when processing this record.

Perform: This value is only set manually and is for your informational purposes.

Search

Displays the status of the record regarding the Search/Match process. Values are:

Complete: The Search/Match process was run without errors.

Error: The Search/Match process was run and errors were detected on this record.

Perform: The Search/Match process has not yet been run for this record.

Post

Displays the status of the record regarding the Post process. These values can be entered manually, however, some are entered by the system after processes are run, as described in the following table.

Post Value	Meaning	How Set
Error	The posting process encountered a problem.	Set by the system during the Post process.
New ID Add	The system was unable to find a match in the database and will add a record with a new ID to your database when the Post process is run.	Set by the system during the Search/Match process if no match was found in your database.
Take No Action	This value is only added manually. It is not automatically entered by the system. If this value is entered, the Post and Purge Suspense File processes ignore the record.	Set manually.
Purge	This value indicates that this suspense record will be removed from the system during the Purge Suspense File process.	Set by the system during the Post process if the record was successfully processed or if the Search/Match process ignored the suspense record that matched a record in your database.
Update existing ID	The system found a matching ID in the database. This existing ID record will be updated with the data from this TAC record during the process.	Set by the system during the Search/Match process if a match was found in the database and if your TAC Search Parameters define that an update should occur in this situation.

Post Value	Meaning	How Set
Awaiting Search	This record is in the Suspense File and is waiting to be processed by the Search/Match process.	Set by the system during the TAC Load External Data process.

Warning! While you can manually edit the values in the Edit, Search, and Post fields, keep in mind that if a field contains Error and you manually change it without correcting an error, you may encounter problems when posting the data. Edit, Search, and Post values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming effort.

Error Indicators

If *Error* appears in any of the Processing Options fields, the Error Indicators group box appears in the areas an error occurred: *Last Name*, *Birth Date*, *First Name* and *Academic Program Error*. Correct any errors on the appropriate pages in this component before running the post process. When you save the changes, the processing options on the page update appropriately. For example, if the Edit field displays *Error*, and you fix the error, the program updates the Edit field to *Complete*. You can view additional information about these errors in the Messages group box on the Process Options page.

Search/Match Results

In the Search/Match Results group box, the system displays the order number of the search level used to find a match for this person. Search order levels are defined on the Search/Match Criteria page. Additionally, the system displays the number of matches found for this person.

Messages

Message Severity	The message severity, such as <i>Message</i> or <i>Error</i> .
Message Text	The message on this row of data.
Description	The detailed message.
Comments	Results or other additional information about the message.
Process Instance	The process number of the process that you ran for this record. The Process Scheduler generates this number.
Run Date/Time	The day and time the process ran for this record.
Process Name	The name of the application engine that you ran for this record.
User ID	The user ID of the person who ran the process.

Reviewing Personal Information

Access the Personal Information page (Student Admissions, TAC Processing, TAC Suspende, Personal Information).

Process Options

Personal Information

Address

Residency

Qualifications

Subjects

Offers

Last Name:

Farnsworth

External Application Nbr:

88217311F

First Name:

Jake

Date Loaded:

27/09/2011

Middle Name:

William

Test ID:

VTAC

Personal Information

ID:

☒ OK to Post

Applicant Number:

CHESSN:

4699535093

Name Prefix:

Gender:

Male

Other Name:

Smith

Other Name 2:

Previous First Name:

JOHN

Previous Second Name:

JAMES

Date of Birth:

02/03/1992

TAC Birthdate:

Birth Country:

CHN

China

Citizenship:

Citizen

FEE-HELP Balance:

0.00

SLE Usage:

0.00000

DEST As At Date:

Ordinary SLE Balance:

7.00000

Year 12 Location:

School Postcode:

3220

Personal Information page (1 of 2)

Contact Information

☐ Standard Address Format

Address 1:

11z Brownpooch Sth Road

Address 2:

Address 3:

Address 4:

City:

Drysdale

State:

VIC

Victoria

Postal Code:

3222

Overseas Zip:

3222

Country:

AUS

Australia

Phone Country Code:

+61

Area Code:

Daytime Telephone:

55555555

Mobile:

0400000000

Other Area Code:

03

Other Phone:

8888 7777

FAX:

Email Address:

jfarnsworth@other.emailaddress.com.au

Personal Information page (2 of 2)

This page contains all biographical and demographic data loaded into the suspense table when a new record is posted.

Reviewing Address Information

Access the Address page (Student Admissions, TAC Processing, TAC Suspense, Address).

Process Options

Personal Information

Address

Residency

Qualifications

Last Name:

Glover

External Application Nbr:

123000018

First Name:

John

Date Loaded:

02/13/2007

Middle Name:

Test ID:

SATAC

Current Address

Address 1:

15 GINGER CRESCENT

Address 2:

Address 3:

Address 4:

City:

DEERPARK

State:

VIC

Victoria

Postal:

Country:

AUS

Australia

Residential Address

Address 1:

18 Longbeach Road

Address 2:

Somerset

Address 3:

Address 4:

City:

Melbourne

State:

VIC

Postal:

3000

Country:

AUS

Address page

Use this page to view applicant's current and residential addresses, if supplied by TAC. SATAC may provide both the addresses. VTAC may provide a residential address which appears in this page.

Reviewing Residency Information

Access the Residency page (Student Admissions, TAC Processing, TAC Suspense, Residency).

Process Options		Personal Information		Address		Residency		Qualifications	
Last Name:	Anderson			External Application Nbr:	27005784L				
First Name:	Saverio			Date Loaded:	23/09/2009				
Middle Name:				Test ID:	VTAC				
Residency									
Perm Residency:				Citizenship:	5				
Residency:	AUS			Australian Resident					
Home Residency:	5045			Permanent Residency Date:					
Apply for Home Residency:				Application Check:					
Citizenship Country:									
Language Indicator:	E			Language Code:	EN				
Method A:				Method B:					
Consulate:									
Passport First Name:									
Passport Middle Name:									
Passport Last Name:									
Final Applicant Decision:				Enrollment Indicator:					
Ethnicity:	2			Applicant Born Indicator:	A				
Year Arrival:				Enrollment Preference Number:					
Highest Attain:									
Highest Education Parent/Guardian 1:	59			Unknown					
Highest Education Parent/Guardian 2:	49			Unknown					

Residency page

Use this page to view the applicant's biographical and demographical information if supplied by TAC.

To post the Highest Education Parent/Guardian 1 and Highest Education Parent/Guardian 2 data, you must ensure that the configuration for DEEWR Elements 573 and 574 is complete (Set Up SACR, Product Related, Student Records, Enrolment Reporting Codes, AUS Regulatory Report Setup, DEEWR Highest Education).

The TAC Run Search/Match Post process posts the information from these two fields to the Student Data AUS component (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS).

Reviewing Qualification Information

Access the Qualifications page (Student Admissions, TAC Processing, TAC Suspense, Qualifications).

Process Options

Personal Information

Residency

Qualifications

Subjects

Last Name:

Beethoven

External Application Nbr:

730512311

First Name:

Anthony

Date Loaded:

25/06/2009

Middle Name:

Test ID:

QTAC

Qualifications

Find | View All

First

1 of 1

Last

Ext Org ID:

000010092

Landmark College

Level:

6

TAC Origin of Qualification:

3019

TAC Course Code:

Ter-BACHELOR-1

TAC Course Title:

B-Arts

Year:

2005

Institution/Course Code:

2000

Type:

Start Year:

1999

Field of Study:

090000

Result Number:

Student Nbr:

40793867

FTE:

0.500000

VTAC State:

Result:

67.100

Number:

2

Honors Category:

Magna

Rank:

73

Status:

Level VET:

VET Type:

School Code:

Qualifications page

The information on the Qualifications page will vary depending on the TAC. For example, the page displays TAC Origin of Qualification and School Code fields only for QTAC.

Reviewing Subjects Information

Access the Subjects page (Student Admissions, TAC Processing, TAC Suspense, Subjects).

Process Options

Personal Information

Residency

Qualifications

Subjects

Last Name:

Beethoven

External Application Nbr:

730512311

First Name:

Anthony

Date Loaded:

24/06/2009

Middle Name:

Test ID:

QTAC

Subjects

Find | View All

First

1 of 7

Last

External Org ID:

000000001

Cottonwood High School

TAC Course Code:

SEC-QLD-SEP

Semester:

4

Number:

1

Type:

SBSU

Level:

5

Fact Score:

Estimated Score:

TAC Subject Title:

ENGLISH

Code:

001

Results:

VH

Year:

2003

Old Subject Grade:

Old Subject Mark:

Unit 2 Result:

Unit 1 Result:

Unit 4 Result:

Unit 3 Result:

Year 12 Year:

2003

Avg CAT Grade:

TAC State Code:

QLD

Subjects page

The information on the Subjects page will vary depending on the TAC.

Reviewing Preferences

Access the Preferences page (Student Admissions, TAC Processing, TAC Suspense, Preferences).

Qualifications		Subjects		Preferences		Offers		PCRS		Fact	
Last Name:	Lawson	External Application Nbr:	123000022								
First Name:	John	Date Loaded:	02/13/2007								
Middle Name:	Volvo	Test ID:	SATAC								
Preference Data Find View All First 1 of 1 Last											
Academic Program:	BART										
Program Code:	114021										
Preference Nbr:	1										
Course Title:	B PHARMACY										
TAC Plan:											
Offer Round Number:	5										
TAC Stream Title:											
TAC Stream Code:											
Offer Date:	02/13/2007										
Offer Response:											
CAS Value:	YES										
CAS type:	CAS										
Admission:	31										
Date	08/28/2006										
Offer Status:	Y										
CAS Reason:	Allocatable.										
Admission:	CRSSA3TH_CALC - Allocation										

Preferences page

The information on the Preferences page will vary depending on the TAC. The system does not display this page for QTAC.

Reviewing VTAC Data

Access the VIC Data page (Student Admissions, TAC Processing, TAC Suspense, VIC Data).

Offers	Preferences	VIC Data	Common Assessment Tasks	VIC Results	VCAL Studies	VCAL Units
Last Name: Farnsworth		External Application Nbr: 88217311F				
First Name: Jake		Date Loaded: 27/09/2011				
Middle Name: William		Test ID: VTAC				
Victorian Suspense Details						
Stat Percentile: 123		Stat Type: E				
Enrolment Status: F		Enrolment Indicator: 47901				
Final Year TAFE: ☐		Year of application: 2010				
Self Management: ☐		Cooperative: ☐				
Adaptability: ☐		Communication: ☐				
Evaluation: ☐		Learning Problem: LEARNING				
Hearing Problem: HEARING		Mobility Problem: MOBILITY				
Medical Problem: MEDICAL		Other Problem: OTHER				
Vision Problem: VISUAL		Acceptance Indicator: ☐				
VTAC Number: E		Category: V16				
Exempt Indicator: P		Supplemental Indicator: N				
Grade Indicator: ☐		Unit Indicator: N				
Year 12 Indicator: VIO		School State Code: VIC				
Oral English Grade: ☐		SEAS Application: Y				
Oral English Remark: ☐		Oral English Grade Estimate: ☐				
Enhancement/VET in Schools: H		Current Year Enter State Code: VIC				
Disability Advice Required: N		UMAT Identification: 1234567890				
Initiative: ☐		Incomplete Secondary Studies: H				

VIC Data page

The system displays this page for only VTAC. Use this page to view profile and personal information loaded from the VTAC offer file.

Reviewing Common Assessment Tasks

Access the Common Assessment Tasks page (Student Admissions, TAC Processing, TAC Suspense, Common Assessment Tasks).

VIC Data		Common Assessment Tasks		VIC Results		VCAL Studies		VCAL Units	
Last Name:	Carlton			External Application Nbr:	27004793D				
First Name:	Craig			Date Loaded:	11/05/2007				
Middle Name:	Andrew			Test ID:	VTAC				
Common Assessment Find View All First 1 of 15 Last									
External Org ID:	01060			Ballarat High School					
TAC Course Code:	YEAR 12 RESULTS-1999								
Subject Code:	BM			CAT Number:	1				
Common Assessment Task									
Task ID:	1			Grade:	C+				
Estimated CAT Grade:				Remark:					
Consideration of Disadvantages									
Permanent Disadvantage:	☐			Environment:	☐				
Sickness:	☐			Absent:	☐				

Common Assessment Tasks page

The system displays this page for only VTAC. Use this page to view Graded Assessment (CAT) results data loaded from the VTAC offer file.

Reviewing VIC Results

Access the VIC Results page (Student Admissions, TAC Processing, TAC Suspense, VIC Results).

Offers		Preferences		VIC Data		VIC Results		VCAL Studies		VCAL Units	
Last Name:	Farnsworth			External Application Nbr:	88217311F						
First Name:	Jake			Date Loaded:	27/09/2011						
Middle Name:	William			Test ID:	VTAC						
VIC Results Find View All First 1 of 4 Last											
Result Year:	2008			Type of Schooling Indicator:	N + -						
VCAA Indicator:	S			VTAC Indicator:	T						
ENTER Type:	A			ENTER:	84.75						
Accrediting Authority Code:	VIC										

VIC Results page

The system displays this page for only VTAC. Use this page to view results summary information loaded from the VTAC offer file.

Reviewing VCAL Data

Access the VCAL Studies page (Student Admissions, TAC Processing, TAC Suspense, VCAL Studies).

VIC DataCommon Assessment TasksVIC ResultsVCAL StudiesVCAL Units

Last Name:RogersExternal Application Nbr:27009448A

First Name:KristineDate Loaded:11/05/2007

Middle Name:EloiseTest ID:VTAC

VCAL StudiesFind | View AllFirst1 of 3Last

VCAL Cert Year:2003VCAL Cert Result Status:S

VCAL Cert Code:CERTIFICATE I

VCAL Studies page

The system displays this page only for VTAC. Use this page to view information related to Victorian Certificate of Applied Learning (VCAL) data.

Reviewing VCAL Units

Access the VCAL Units page (Student Admissions, TAC Processing, TAC Suspense, VCAL Units).

VIC DataCommon Assessment TasksVIC ResultsVCAL StudiesVCAL Units

Last Name:RogersExternal Application Nbr:27009448A

First Name:KristineDate Loaded:11/05/2007

Middle Name:EloiseTest ID:VTAC

VCAL UnitsFind | View AllFirst1 of 15Last

VCAL Unit Year:2005VCAL Unit Result Status:S

VCAL Unit Code:UNIT1

VCAL Units page

The system displays this page only for VTAC. Use this page to view information related to VCAL unit data.

Reviewing Assessment Data

Access the Assessment Data page (Student Admissions, TAC Processing, TAC Suspense, Assessment Data).

Common Assessment Tasks

VIC Results

VCAL Studies

VCAL Units

Assessment Data

Last Name:

Rogers

External Application Nbr:

27009448A

First Name:

Kristine

Date Loaded:

11/05/2007

Middle Name:

Eloise

Test ID:

VTAC

Assessment Data

UTESL - Reading:

1

VTAC Assess 1:

999

UTESL - Listening:

2

VTAC Assess 2:

888

UTESL - Writing:

3

VTAC Assess 3:

777

UTESL - Global:

4

VTAC Assess 4:

666

Australian Equivalent:

1

Assessment Data page

The system displays this page only for VTAC. Use this page to view information related to assessment data for graduate entry teaching.

Reviewing Offers

Access the Offers page (Student Admissions, TAC Processing, TAC Suspense, Offers).

Personal Information		Residency		Qualifications		Subjects		Offers		Fact	
Last Name:	Beethoven			External Application Nbr:	730512311						
First Name:	Anthony			Date Loaded:	25/06/2009						
Middle Name:				Test ID:	QTAC						
Offer Details											
Admit Type:	OTH			School Code:							
Application Date:	30/09/2007 			Offer Date:	15/09/2007 						
TER Score:	199.000			OP Score:							
Round Number:	99			Program Code	753001						
Academic Program:	MACOM			TAC Stream Code:							
Preference Nbr:	3			Overall Status:							
Schedule:	FORCED OFFER			Offer Month:	DEC						
Rank Set:	199:			Offer Year:	2009						
Base Schedule:	S5002										
Base Rank Set:	73:										
Basis of Admission:	29			Admission Type:							
Field Posn A:				Field Posn B:							
Field Posn C:				Field Posn D:							
Field Posn E:				Applicant Type:							
Offering Label:											
Offered CRS Label:	FORCED OFFER										

Offers page

The information on the Offers page will vary depending on the TAC. Use this page to view the applicant's program of offer.

Reviewing FACT Data

Access the Fact page (Student Admissions, TAC Processing, TAC Suspense, Fact).

Qualifications	Subjects	Preferences	Offers	PCRS	Fact

Last Name:	Lawson	External Application Nbr:	123000022
First Name:	John	Date Loaded:	02/13/2007
Middle Name:	Volvo	Test ID:	SATAC

Fact Values					
	Code	Description	DEST Question	Value	
1	ASDIV	Aust Stats Div - New South Wales	N	NSW	+ -
2	D1		1	10000	+ -
3	D2		2	22006	+ -
4	D3		3	10000	+ -
5	D4		4	10000	+ -

Fact page

Use this page to view the data loaded from the FACT file.

The Fact codes mapped to DEST reference numbers are posted to DEST Education Participation Details section of the Student Data AUS page. Select Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS to navigate to the Student Data AUS page.

Reviewing PCRS Data

Access the PCRS page (Student Admissions, TAC Processing, TAC Suspense, PCRS).

Qualifications	Subjects	Preferences	PCRS	Fact

Last Name:	Lawson	External Application Nbr:	123000022
First Name:	John	Date Loaded:	02/13/2007
Middle Name:	Volvo	Test ID:	SATAC

Preference Data	
Academic Program:	Preference Nbr:
BART	1

Preference Course Rank Set	
Label:	BOA Code:
CRSSA3TH_CALC	31
Value:	299:
Reason:	TDR.

PCRS page

The system displays this page only for SATAC. Use this page to confirm that the data has been loaded from the Preference Course Rank Set file.

Performing Search/Match and Posting TAC Data

This section provides an overview of how to search/match and post external data, and discusses how to:

- Enter TAC run parameters.
- Enter TAC search/match parameters.

Understanding Performing Search/Match and Posting TAC Data

Once you have loaded the TAC data to the suspense file, you specify on the Search Params page which TAC data to load into your database as new records, which TAC data to append to existing records in your database, and which TAC data to ignore or suspend. After choosing your search/match parameters, you can also set up the parameters for posting the TAC data, and you can run both processes at once: to update the suspense file accordingly and to post the TAC external data. Alternatively, you can first run the search/match process to update the suspense file and then later run the posting process to post the TAC external data to your database.

Admissions Information that the TAC Bulk Offer Data Load Populates

Examples of the admissions information populated by the TAC Post Process include:

- Personal data.
- Name and address data.
- Personal phone.
- Application Program Data page information.
- If there are multiple preferences, then additional program application data.
- Test results.
- External education data and school loading data including external degrees, courses, and subjects.
- Residency data.
- Government reporting information including education and training data, and Commonwealth Higher Education Student Support Number (CHESSN) and Student Learning Entitlement (SLE) information.

Pages Used to Perform Search/Match and Post TAC Data Loads

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TAC Run Search/Match Post	SAD_TAC_POST_RUN	Student Admissions, TAC Processing, Search/Match/Post TAC, TAC Run Search/Match Post	Post external TAC data from suspense files. Before you post the data, however, set up the search/match parameters on the Search Parms page. You can post a single record or all of the records in the suspense file.
Search Parms	SEARCH_PARMS	Student Admissions, TAC Processing, Search/Match/Post TAC, Search Parms	Define search and match parameters, which specify the data that the system will append to existing records in your database and the TAC data that the system will ignore. <i>See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Setting Up Search/Match."</i>

Entering TAC Run Parameters

Access the TAC Run Search/Match Post page (Student Admissions, TAC Processing, Search/Match/Post TAC, TAC Run Search/Match Post).

TAC Run Search/Match Post		Search Params
Run Control ID:	UAC	
	Report Manager	Process Monitor Run
TAC Code:	UAC	New South Wales
Execution Option		
☒ Search, Match and Post ☐ Post Only ☐ Search and Match Only		
Post Processing Parameters		
Academic Institution:	PSAUS	PeopleSoft Australia Uni
Date Loaded:	12/12/2007	
☐ Process Single Record		
Address Type:	Mailing	
Phone Type:	Home	
Email Type:	Other	
Academic Level:	1st Year	
Application Method:	EDI	
Application Defaults Find View All First 1 of 1 Last + -		
Academic Career:	PGRD	Postgraduate
Admit Term:	0581	Semester 1 - Autumn 2007
Application Center:	PGRD	Postgraduate Admissions Office
Recruiting Center:	PGRD	

TAC Run Search/Match Post page

Enter the TAC test ID that you want to process. Once the TAC test ID is entered, the additional fields specific to the TAC will appear. You must have test ID security established to select a value. The prompt will only display test IDs for which you have security. This field is required.

Execution Option

Search, Match and Post

Select this option if you want the process to search your database for records that match the suspense record and post the suspense data to your database.

Post Only

Select this option if you only want to post the suspense data to your database (if you select this option, you must have already run search/match).

Search and Match Only Select this option if you only want to run the search and match process on the suspense file. You will need to post the data later.

Post Processing Parameters

Academic Institution Enter the academic institution to which the applicant data will be posted.

Date Loaded Enter the date for the data load.

Process Single Record If you prefer to process and post a single record, in the Post Processing Parameters group box, select the Process Single Record check box and specify the external applicant number. Rather than processing the entire file, you can quickly process a single record. If you prefer to process the entire suspense file, do not select Process Single Record.

Address Type If the search/match/post process adds a new record to your database, the process loads the address information from the TAC suspense record into the Addresses page. Select the address type that you want the process to assign to the new address. Define address types in the Address Type table.

For VTAC data:

- The search/match/post process assigns the address type that is set on the TAC Run Search/Match Post page to the postal address referenced on the Personal Information suspense page.
- The search/match/post process assigns the home address type set on the Campus Community Installation - Names / Addresses page to the residential address.
- If the Campus Community home address type field and the Address Type field have the same value (for example, *campus*), the search/match/post process posts only the postal address to the database and does not post the residential address.

Note. Do not select an address type if you want to post a SATAC file. The TAC Load process, by default, assigns the MAIL address type to the postal addresses provided by SATAC. Additionally, the TAC Load process, by default, assigns the HOME address type to the current addresses provided by SATAC.

Phone Type Select the phone type that you want the process to assign.

Email Type Select the email type that you want the process to assign.

Academic Level Select the default academic level for this upload of applicants.

Application Method Select the default application method for this upload of applicants.

Academic Career Enter the academic career to which applicants will be posted.

Admit Term	Enter the admit term for the applicants.
Application Center	Enter the default application center for these applicants.
Recruiting Center	Enter the default recruiting center for this upload of applicants.

Entering TAC Search/Match Parameters

Access the Search Params page (Student Admissions, TAC Processing, Search/Match/Post TAC, Search Params).

TAC Run Search/Match Post
Search Params

Run Control ID: UAC
[Report Manager](#)
[Process Monitor](#)
Run

*Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional

No Match Found

	Add	Update	Suspend	Ignore
New:	☒	☐	☐	☐

Match(es) Found
Find | View All
1-2 of 5

Order Nbr:	10	Name,Addr,City,Bday,Gender,SSN	*****Parameters Refreshed*****	
One Match:	☐	☒	☐	☐
Multiple Matches:	☐	☒	☐	☐
Order Nbr:	20	SSN Only		
One Match:	☐	☐	☒	☐
Multiple Matches:	☐	☐	☒	☐

Search Params page

Use the Search Parameter field to select the group of predefined search parameters you want to use for the process.

Note. The words *Parameters Refreshed* appear if this is the first time that you have entered this page with this run control ID, or if any of the parameters on this page changed since the last time you accessed this page with this run control ID.

No Match Found**New**

Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database:

Add: Add the unmatched record to your database, including personal data.

Suspend: Keep the unmatched record in the suspense file to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Order Nbr (order number)

For each order number, select what you want to do with the record if the search/match/post process discovers one or more matching records.

One Match and **Multiple Matches**

Select whether you want to add, update, suspend, or ignore matching records:

Add: Add a new record to your database using the suspense record.

Update: Update the existing record with the data in the suspense record.

Suspend: Keep the suspense record back in the suspense table.

You need to determine manually whether or not this record matches a record in your database.

Ignore: Ignore the suspense record that matched a record in your database.

The process marks the record to be purged.

Purging TAC Suspense Files and Messages

This section provides an overview of the purge process and discusses how to purge suspense data.

Understanding the Purge Process

Specify which TAC suspense file records to purge, and do the actual purging on the TAC Purge Parameters page. You can also purge TAC messages in this process. If you want to perform an analysis on your processing, perhaps at the end of a year, do not purge your messages with this process. Instead, purge them later, when you no longer need to view them.

Page Used to Purge TAC Suspense Data

Page Name	Definition Name	Navigation	Usage
TAC Purge	SAD_TAC_PURGE	Student Admissions, TAC Processing, TAC Purge	Purge suspense records and messages for a specific TAC test ID.

Purging Suspense Data

Access the TAC Purge page (Student Admissions, TAC Processing, TAC Purge).

TAC Purge

Run Control ID: QTAC [Report Manager](#) [Process Monitor](#) Run

*TAC Code: Queensland Tertiary Admission

*Date Loaded:

Purge Processing Parameter

☒ All Suspense Rows

☐ Marked Suspense Rows

Message Purge Parameter

☐ Retain Associated Messages

☒ Remove Associated Messages

TAC Purge page

TAC Code

Enter the TAC test ID that you want to delete from the suspense record. The TAC test ID list that appears in the prompt is based on the test ID security.

Date Loaded

Enter the date when the files, which you want to purge, were loaded.

All Suspense Rows

Select this option if you want to purge all of the records in your suspense table, regardless of the status of the Post field on the Process Options page.

Marked Suspense Rows	Select this option if you only want to purge those records in your suspense file marked <i>Purge</i> in the Post field on the Process Options page. Select this option if you want to remove all suspense records that have been posted or set to purge and retain the suspense records outstanding for review or processing. The purge process will only delete suspense records with <i>Purge</i> in the <i>Post</i> field on the Process Options page.
Retain Associated Messages	Select this option if you want to retain messages that are associated with the suspense records that you are purging.
Remove Associated Messages	Select this option if you want to remove messages that are associated with the suspense records that you are purging.

Reviewing TAC Candidate Data

This section provides an overview of TAC student profile data and lists the pages used to review profile data.

Understanding TAC Candidate Data

After running the TAC Run Search/Match Post process, TAC student profile information, if posted to an ID, appears in the TAC Candidate Data component. Note that the TAC Load process loads the TAC file data to the suspense file for all TAC records. Suspense file data, however, is eventually purged, so the TAC Candidate Data pages have been provided so that you can later view the TAC data for those records that posted.

The data on these pages is informational only. The Date Loaded field is also a key on the candidate data. Your institution therefore has a complete audit trail on what has been posted for a student, you can display the initial creation plus later updates from any additional offer rounds.

Not all data contained in the suspense tables is posted to the Recruiting and Admissions application. The system populates only minimal personal data; applicant data, external education data, and residency data in order to create an applicant. The student profile provides a means of inquiring on all data loaded to the suspense files for a posted student. This means your institution can refer back for a student's total TAC data but not all of it is used to create the student's admissions record.

The pages and data that appear on the TAC Candidate Data component are similar to the pages and data that appear on the TAC Suspense component. However, you cannot modify any information on the TAC Candidate Data component because the data has already been posted. The number of pages on the TAC Candidate Data component will vary depending on the TAC test ID.

Pages Used to View TAC Student Profile Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Information	SAD_TAC_CD_BIO	Student Admissions, TAC Processing, TAC Candidate Data, Personal Information	Demographic data appears on this page from the TAC Suspense–Personal Information page. This page also indicates if a personal record was created for this person in your database.
Address	SAD_TAC_CD_ADD_CUR	Student Admissions, TAC Processing, TAC Candidate Data, Address	Review address details about a student.
Qualifications	SAD_TAC_CD_QULSAS	Student Admissions, TAC Processing, TAC Candidate Data, Qualifications	Review qualifications details for a student.
Subjects	SAD_TAC_CD_SBJSA	Student Admissions, TAC Processing, TAC Candidate Data, Subjects	Review subjects taken by a student.
Offer	SAD_TAC_CD_OFFER	Student Admissions, TAC Processing, TAC Candidate Data, Offer	Review details about the offer for a student.
Fact	SAD_TAC_CD_FACT	Student Admissions, TAC Processing, TAC Candidate Data, FACT	Review FACT data (including DEST questions) about a student.
Residency	SAD_TAC_CD_BIO_RES	Student Admissions, TAC Processing, TAC Candidate Data, Residency	Review residency and additional DEST reporting information about a student.
Preferences	SAD_TAC_CD_PRFSA	Student Admissions, TAC Processing, TAC Candidate Data, Preferences	Review preference details for a student.
VIC Data	SAD_TAC_CD_VIC_OTR	Student Admissions, TAC Processing, TAC Candidate Data, VIC Data	Review biographical and demographic information for a student from the Victorian TAC.
Common Assessment Tasks	SAD_TAC_CD_CAT	Student Admissions, TAC Processing, TAC Candidate Data, Common Assessment Tasks	Review common assessment task details for a student.
VIC Results	SAD_TAC_CD_VIC_RSL	Student Admissions, TAC Processing, TAC Candidate Data, VIC Results	Review results details for a student from the Victorian TAC.

Page Name	Definition Name	Navigation	Usage
VCAL Studies	SAD_TAC_CD_VCL	Student Admissions, TAC Processing, TAC Candidate Data, VCAL Studies	Review information about VCAL Studies.
VCAL Units	SAD_TAC_CD_VCU	Student Admissions, TAC Processing, TAC Candidate Data, VCAL Units	Review information about VCAL units.
Assessment Data	SAD_TAC_CD_VIC_AS	Student Admissions, TAC Processing, TAC Candidate Data, Assessment Data	Review information about assessment data for graduate entry teaching.
PCRS (preference course rank set)	SAD_TAC_CD_PCRSA	Student Admissions, TAC Processing, TAC Candidate Data, PCRS	Review a student's preference course rank set information.

Chapter 23

(CAN) Receiving External Applications from OUAC

This chapter provides an overview of external applications from OUAC and discusses how to:

- Pre-load OUAC data.
- Load OUAC data through the EDI Manager.
- Load additional data through an SQR process.
- Review and edit OUAC transaction A/U staging tables.
- Review and edit OUAC transaction B5 staging tables.
- Review and edit OUAC transaction B/V-E staging tables.
- Review and edit OUAC transaction F staging tables.
- Review and edit OUAC transaction G/H staging tables.
- Review and edit OUAC transaction J-N staging tables.
- Review and edit OUAC transaction P-R staging tables.
- Review and edit OUAC transaction T staging tables.
- View search/match and OUAC processing statuses.
- Post OUAC transaction data.
- View OUAC messages.
- Review overflow OUAC application information.

Understanding External Applications from OUAC

Universities in Ontario, Canada use the Ontario Universities Application Center (OUAC) throughout their undergraduate admissions process. The OUAC collects much of the undergraduate admissions data from various sources and electronically transmits the data to institutions in Ontario.

PeopleSoft developed the OUAC interface using EDI Manager. This tool enables you to load data that you receive electronically from OUAC into your PeopleSoft application. The system posts personal data, application data, academic history, and testing information to core tables in your database.

To process OUAC transactions, you run a pre-load process that prepares the OUAC file for EDI. Then you load the data from the OUAC file into staging tables in your application. While the data is in the staging tables you can view and edit the data. When you are ready, you post the data to tables in your application.

The OUAC defines the fields on these pages. Please refer to the *OUAC Systems Manual* for explanations of the individual fields on each page.

Pre-Loading OUAC Data

This section discusses how to pre-load OUAC data.

Page Used to Pre-Load OUAC Data

Page Name	Definition Name	Navigation	Usage
OUAC Pre Load Parms (OUAC pre load parameters)	OUAC_PRELOAD_PARMS	Student Admissions, OUAC, Processes, Pre Load Data Process	Prepare the OUAC file for EDI. The OUAC pre load process adds control records to transaction groups and sends them to the output file.

Pre-Loading OUAC Data

Access the OUAC Pre Load Parms (OUAC pre load parameters) page (Student Admissions, OUAC, Processes, Pre Load Data Process).

OUAC Pre Load Parms

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Path/Name- Input/Output Files

Input File:

Output Des:

OUAC Pre Load Parms page

Input File Enter the full path and name of the OUAC file that you want to process.

Output Des (output description) Enter the full path and name of the output file.

Click the Run button to run the OUAC pre load process at user-defined intervals.

Loading the OUAC Data Through the EDI Manager

Use the Schedule Inbound EC Agent - Run Control Parameters page to load the OUAC data through EDI Manager. The Inbound EC Agent process (ECIN0001) translates the values in the flat file created by the OUAC pre-load process and loads them into staging tables. Set the run option parameter to single file and the force profile parameter to do not force.

See Also

PeopleTools PeopleBook

Loading Additional Data Through an SQR Process

This section discusses how to load additional data through an SQR process.

Page Used to Load Additional Data Through an SQR Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Load	PRCSRUNCNTL_AD_OL	Student Admissions, OUAC, Processes, Load OUAC Data	Translate OUAC data that EDI Manager is not equipped to handle (such as dates that are in YYMM format, name fields that need to be converted to the PeopleSoft format, and other character fields that need to be converted to mixed case).

Reviewing and Editing the OUAC Transaction A/U Staging Tables

This section discusses how to use the OUAC Transactions A/U component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction A/U Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC A1/U1	OUAC_A1_U1_PNL	Student Admissions, OUAC, Transactions, Transactions A/U	Review and edit OUAC transaction data.
OUAC A2/U2	OUAC_A2_U2_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A2/U2	Review and edit OUAC transaction data.
OUAC A3/U3	OUAC_A3_U3_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A3/U3	Review and edit OUAC transaction data.
OUAC A4/U4	OUAC_A4_U4_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A4/U4	Review and edit OUAC transaction data.
OUAC A5/U5	OUAC_A5_U5_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A5/U5	Review and edit OUAC transaction data.
OUAC A6/U6	OUAC_A6_U6_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A6/U6	Review and edit OUAC transaction data.
OUAC A7/U7	OUAC_A7_U7_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A7/U7	Review and edit OUAC transaction data.
OUAC A8/U8	OUAC_A8_U8_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A8/U8	Review and edit OUAC transaction data.
OUAC A9/U9	OUAC_A9_U9_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A9/U9	Review and edit OUAC transaction data.
OUAC AR	OUAC_AR_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC AR	Review and edit OUAC transaction data.

Reviewing OUAC Transactions A1/U1

Access the OUAC A1/U1 page (Student Admissions, OUAC, Transactions, Transactions A/U).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8	
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:	A1	OUAC Dist. Nbr.:	14	Institution:	PSUNV	
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status:	Loaded			
A1/U1 Transaction Data - OUAC								
Name Prefix:	Mr	Trans ID:	OUAC_UAS_ADD					
Given Names:	Chadwick							
Surname:	Forde							
Address Usage:	☐							
OUAC Transaction Pos. 92-95:	9355							

OUAC A1/U1 page

Reviewing OUAC Transactions A2/U2

Access the OUAC A2/U2 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A2/U2).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8	
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:	A2	OUAC Dist. Nbr.:	14	Institution:	PSUNV	
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status:	Loaded			
A2/U2 Data - Mailing Address								
Address Line 1:	26-450 Rymal Rd E							
Address Line 2:								
OUAC Transaction Pos. 92-95:	9355							

OUAC A2/U2 page

Reviewing OUAC Transactions A3/U3

Access the OUAC A3/U3 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A3/U3).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A3 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A3/U3 Data - Home Address							
Address Line 1:		26-450 Rymal Rd E					
Address Line 2:							
OUAC Transaction Pos. 92-95:		9355					

OUAC A3/U3 page

Reviewing OUAC Transactions A4/U4

Access the OUAC A4/U4 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A4/U4).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A4 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A4/U4 Transaction Data							
Curr Ctzn Cntry:		CAN		Country Code:		CAN	
Citizenship Status:		Native		Country:		CAN	
County:		66		Province:		ON	
Gender:		Male		Birthdate:		05/03/1981	
Marital Status:		Single		Mature Student:			
Mident Code:		855685		1st Language:		(Invalid Valu	
Ontario Education Number:		999999999		Preferred Language:		(Invalid Valu	
School Board:		67121		OUAC Signature:		Y	
OUAC Transaction Pos. 92-95:		9355					

OUAC A4/U4 page

Reviewing OUAC Transactions A5/U5

Access the OUAC A5/U5 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A5/U5).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A5 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A5/U5 Transaction Data - OUAC Find View All First 1 of 1 Last							
Admit Term: 0450		Academic Program: ED		Yrs Eng School: 13			
Acad Load: Full-Time		OUAC Process Dt: 9355		Yrs in High Sch: 5			
Acad Level: Freshman		Cntry Eng Schl: CAN		Prior Appl: N			
OUAC Release: Yes		Lang. Instruct.: E		French Courses:			
Postsecondary: No		Birth Country:		OUAC Choice: 2			
Fin Aid: Y		Canada Entry Dt: 999998		Convert Choice: 2			
Housing: On Campus		Subject Area: 080					
Coop Requested:		Admit Basis: 110					
OUAC Transaction Pos. 92-95: 9355							

OUAC A5/U5 page

Reviewing OUAC Transactions A6/U6

Access the OUAC A6/U6 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A6/U6).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A6 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A6/U6 Data - Mailing Address							
Address Line 3:		Hamilton					
Postal Code:		L8W 1B3					
Telephone:		905/574-0775					
Province:		ON					
Zip:							
Advanced Standing Program:							
Advance Standing Year:							
OUAC Transaction Pos. 92-95: 9355							

OUAC A6/U6 page

Reviewing OUAC Transactions A7/U7

Access the OUAC A7/U7 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A7/U7).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A7 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A7/U7 Data - Home Address							
Address Line 3:		Hamilton					
Postal Code:		L8W 1B3					
Telephone:		905/574-0775					
Province:		ON					
Zip:							
OUAC Transaction Pos. 92-95:		9355					

OUAC A7/U7 page

Reviewing OUAC Transactions A8/U8

Access the OUAC A8/U8 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A8/U8).

OUAC A1/U1	OUAC A2/U2	OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8
Trans ID: OUAC_UAS_ADD OUAC Identifier: A9 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A8/U8 Transaction Data - TEAS							
OUAC University Degree From:				Program of Study:			
OUAC Converted Choice:		☐		OUAC Choice Number:			
Language of Instruction:				Housing Interest:			
Appl. Process Date - YDDD:				Previous Registration Yr:			
Teaching Subject 1:							
Teaching Subject 2:							
OUAC Transaction Pos. 92-95:							

OUAC A8/U8 page

Define teaching subjects on the OUAC Teaching Subject Table page.

Reviewing OUAC Transactions A9/U9

Access the OUAC A9/U9 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC A9/U9).

OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8	OUAC A9/U9	OUAC AR
Trans ID: OUAC_UAS_ADD OUAC Identifier: A9 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
A9/U9 Transaction Data - CEGEP							
CEGEP Code Permanent: Authorized to Release Academic: v Comments: v OUAC Transaction Pos. 92-95: 9355							

OUAC A9/U9 page

Reviewing OUAC Transactions AR

Access the OUAC AR page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC AR).

OUAC A3/U3	OUAC A4/U4	OUAC A5/U5	OUAC A6/U6	OUAC A7/U7	OUAC A8/U8	OUAC A9/U9	OUAC AR
Trans ID: OUAC_UAS_ADD OUAC Identifier: A9 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
AR Transaction Data							
Effective Date: 10/05/2004 31 Given Names: Last Name: Academic Program: Academic Level: v Admit Term: Offer Response: v Coop Education Offered: ☐ OUAC Transaction Pos. 92-95:							

OUAC AR page

Reviewing and Editing the OUAC Transaction B5 Staging Tables

This section discusses how to use the OUAC B5 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction B5 Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC B5	OUAC_B5_PNL	Student Admissions, OUAC, Transactions, Transactions A/U, OUAC B5	Review and edit OUAC transaction data.

Using the OUAC B5 Page

Access the OUAC B5 page (Student Admissions, OUAC, Transactions, Transactions A/U, OUAC B5).

OUAC B5

Trans ID: OUAC_UAS_ADD **OUAC Identifier:** B5 **OUAC Dist. Nbr.:** **Institution:** PSUNV
OUAC Ref#: 20000041720 **OUAC Appl. Nbr.:** 02 **OUAC Process Status:** Loaded

B5 Transaction Data - Active Program Selections - OUAC
Find | View All
First 1 of 1 Last

Sequence: + -
Choice 1: **Choice 2:** **Choice 3:** **Choice 4:**
Choice 5: **Choice 6:** **Choice 7:**

OUAC B5 page

Reviewing and Editing the OUAC Transaction B/V-E Staging Tables

This section discusses how to use the OUAC Transactions B/V-E component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction B/V-E Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC B1/V1	OUAC_B1_V1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E	Review and edit OUAC transaction data.
OUAC B2	OUAC_B2_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B2	Review and edit OUAC transaction data.

Page Name	Definition Name	Navigation	Usage
OUAC B7/V7	OUAC_B7_V7_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B7/V7	Review and edit OUAC transaction data.
OUAC B8/V8	OUAC_B8_V8_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B8/V8	Review and edit OUAC transaction data.
OUAC B9/V9	OUAC_B9_V9_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B9/V9	Review and edit OUAC transaction data.
OUAC C1	OUAC_C1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C1	Review and edit OUAC transaction data.
OUAC C2	OUAC_C2_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C2	Review and edit OUAC transaction data.
OUAC D1	OUAC_D1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC D1	Review and edit OUAC transaction data.
OUAC E1	OUAC_E1_PNL	Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC E1	Review and edit OUAC transaction data.

Reviewing OUAC Transactions B1/V1

Access the OUAC B1/V1 page (Student Admissions, OUAC, Transactions, Transactions B/V - E).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1
Trans ID: OUAC_UAS_ADD OUAC Identifier: B1 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
B1/V1 Transaction Data							
Business Phone: 000/000-0000		Date Appl. Received at OUAC: 11/29/1999					
Citizen Spec:		Social Insurance #: 513-496-968					
Law							
English Skill: ☐		French Skill: ☐		Other Language: ☐		Phone Extension:	
Home/Mail Same: ☐		Ever Attend Law: ☐		Withdrawn Law/Oth Prog: ☐			
Part Time							
Fax Nbr:		Attending Class: ☐		Prev with Univ: ☐			
Purpose:		Second Degree: ☐					
Basis of Appl.:		University Id:					
OUAC Transaction Pos. 92-95: 9355							

OUAC B1/V1 page

Reviewing OUAC Transactions B2

Access the OUAC B2 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B2).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1
Trans ID: OUAC_UAS_ADD OUAC Identifier: B8 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded							
B2 Transaction Data							
Contact Name: Henri Bastien							
Contact Phone: 1-467-959-55							
Business Phone:							
OUAC Transaction Pos. 92-95:							

OUAC B2 page

Reviewing OUAC Transactions B7/V7

Access the OUAC B7/V7 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B7/V7).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1	D
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:	B7	OUAC Dist. Nbr.:	14	Institution: PSUNV		
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status: Loaded				
B7/V7 Data - Mailing Address								
Telephone:								
Address Line 4:	CAN							
OUAC Transaction Pos. 92-95:	9355							

OUAC B7/V7 page

Reviewing OUAC Transactions B8/V8

Access the OUAC B8/V8 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B8/V8).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1	D
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:	B8	OUAC Dist. Nbr.:	14	Institution: PSUNV		
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status: Loaded				
B8/V8 Data - Home Address								
Telephone:								
Address Line 4:	CAN							
OUAC Transaction Pos. 92-95:	9355							

OUAC B8/V8 page

Reviewing OUAC Transactions B9/V9

Access the OUAC B9/V9 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC B9/V9).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1	D
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:	B8	OUAC Dist. Nbr.:	14	Institution: PSUNV		
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status: Loaded				
B9/V9 Transaction Data - Law								
Telephone:								
Address Line 4:								
OUAC Transaction Pos. 92-95:								

OUAC B9/V9 page

Reviewing OUAC Transactions C1

Access the OUAC C1 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C1).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1	
Trans ID: OUAC_UAS_ADD OUAC Identifier: B8 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded								
C1 Transaction Data - CEGEP - OUAC Find View All First 1 of 1 Last								
CEGEP Program Last Studied: + - Term Year: External Term: Fall School Code: DEC Received: ☐ OUAC Institution Code: CEGEP Current Cote Z: CEGEP Final Cote Z: OUAC Transaction Pos. 92-95:								

OUAC C1 page

Reviewing OUAC Transactions C2

Access the OUAC C2 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC C2).

OUAC B1/V1	OUAC B2	OUAC B7/V7	OUAC B8/V8	OUAC B9/V9	OUAC C1	OUAC C2	OUAC D1	
Trans ID: OUAC_UAS_ADD OUAC Identifier: B8 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Loaded								
C2 Transaction Data - CEGEP - OUAC Find View All First 1 of 1 Last								
School Course Nbr: 120 Comment: + - Term Year: 2005 CEGEP Code Z: External Term: Message Number: Mean Grade for Course: OUAC Institution Code: Grade Input: A School Code: OUAC Transaction Pos. 92-95:								

OUAC C2 page

Reviewing OUAC Transactions D1

Access the OUAC D1 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC D1).

OUAC B1/V1OUAC B2OUAC B7/V7OUAC B8/V8OUAC B9/V9OUAC C1OUAC C2OUAC D1

Trans ID:OUAC_UAS_ADDOUAC Identifier: B8OUAC Dist. Nbr.: 14Institution: PSUNV

OUAC Ref#: 20000041720OUAC Appl. Nbr.: 02OUAC Process Status: Loaded

D1 Data - Dropped Choices

OUAC Date Dropped:

Subject Area:

Coop Education Offered:

Academic Program:

Admit Term:

Coop Program Requested:

Last Name:

Given Names:

OUAC Transaction Pos. 92-95:

OUAC D1 page

Reviewing OUAC Transactions E1

Access the OUAC E1 page (Student Admissions, OUAC, Transactions, Transactions B/V - E, OUAC E1).

OUAC B2OUAC B7/V7OUAC B8/V8OUAC B9/V9OUAC C1OUAC C2OUAC D1OUAC E1

Trans ID:OUAC_UAS_ADDOUAC Identifier: B8OUAC Dist. Nbr.: 14Institution: PSUNV

OUAC Ref#: 20000041720OUAC Appl. Nbr.: 02OUAC Process Status: Loaded

E1 Transaction Data- Work Experience - OUAC

Find | View AllFirst1 of 1Last

Sequence:

From Date:

To Date:

Action Code:

OUAC Activity:

OUAC Transaction Pos. 92-95:

OUAC E1 page

Reviewing and Editing the OUAC Transaction F Staging Tables

This section discusses how to use the OUAC Transactions F component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction F Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC F1	OUAC_F1_PNL	Student Admissions, OUAC, Transactions, Transactions F	Review and edit OUAC transaction data.
OUAC F2	OUAC_F2_PNL	Student Admissions, OUAC, Transactions, Transactions F, OUAC F2	Review and edit OUAC transaction data.
OUAC F3	OUAC_F3_PNL	Student Admissions, OUAC, Transactions, Transactions F, OUAC F3	Review and edit OUAC transaction data.

Reviewing OUAC Transactions F1

Access the OUAC F1 page (Student Admissions, OUAC, Transactions, Transactions F).

OUAC F1		OUAC E2		OUAC F3	
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:		OUAC Dist. Nbr.:	14
		Institution:	PSUNV		
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status:	
F1 Transaction Data					
B.C. Education Number:		Not Grad Reason:			
Prov. Ministry School Number:		Tot Prov. Cred.:			
B.C. Grad Requirement Year:		Non Prov. Cred.:			
OUAC Degree Date - YYYYMM:		BC Honours Flag:			
OUAC Institution Code:		Transcript Status:			
OUAC Transaction Pos. 92-95:					

OUAC F1 page

Reviewing OUAC Transactions F2

Access the OUAC F2 page (Student Admissions, OUAC, Transactions, Transactions F, OUAC F2).

OUAC F1

OUAC F2

OUAC F3

Trans ID:OUAC_UAS_ADD

OUAC Identifier:

OUAC Dist. Nbr.:14

Institution:PSUNV

OUAC Ref#:20000041720

OUAC Appl. Nbr.:02

OUAC Process Status:

F2 Transaction Data - OUAC

Find | View All

First1 of 1Last

School Course Nbr:

Course Level:

Doctoral

External Course Type:

Course

Term Year:

External Term:

Blended School & Exam %:

OUAC Transaction Pos. 92-95:

Provincial Exam %:

Grade Input:

BC Final Letter Grade:

Units Taken:

Interim School Percent:

BC Interim Letter Grade:

OUAC F2 page

Reviewing OUAC Transactions F3

Access the OUAC F3 page (Student Admissions, OUAC, Transactions, Transactions F, OUAC F3).

OUAC F1		OUAC E2		OUAC F3	
Trans ID:	OUAC_UAS_ADD	OUAC Identifier:		OUAC Dist. Nbr.:	14
OUAC Ref#:	20000041720	OUAC Appl. Nbr.:	02	OUAC Process Status:	
F3 Transaction Data - OUAC Find View All First 1 of 1 Last					
School Course Nbr:		BC Final Letter Grade:			
Course Level:	Doctoral	Units Taken:			
External Course Type:	Course	Partial Credit Flag:			
Term Year:		Interim School Percent:			
External Term:		BC Interim Letter Grade:			
Blended School & Exam %:					
OUAC Transaction Pos. 92-95:					

OUAC F3 page

Reviewing and Editing the OUAC Transaction G/H Staging Tables

This section discusses how to use the OUAC Transactions G/H component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction G/H Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC G1/H1	OUAC_G1_H1_PNL	Student Admissions, OUAC, Transactions, Transactions G/H	Review and edit OUAC transaction data.
OUAC G2/H2	OUAC_G2_H2_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G2/H2	Review and edit OUAC transaction data.
OUAC G3/H3	OUAC_G3_H3_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G3/H3	Review and edit OUAC transaction data.
OUAC G4/H4	OUAC_G4_H4_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G4/H4	Review and edit OUAC transaction data.

Page Name	Definition Name	Navigation	Usage
OUAC G5/H5	OUAC_G5_H5_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G5/H5	Review and edit OUAC transaction data.
OUAC G6/H6	OUAC_G6_H6_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G6/H6	Review and edit OUAC transaction data.
OUAC G7/H7	OUAC_G7_H7_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G7/H7	Review and edit OUAC transaction data.
OUAC G8/H8	OUAC_G8_H8_PNL	Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G8/H8	Review and edit OUAC transaction data.

Reviewing OUAC Transactions G1/H1

Access the OUAC G1/H1 page (Student Admissions, OUAC, Transactions, Transactions G/H).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD OUAC Identifier: G1 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Posted							
Email ID Email ID: wick_63@hotmail.com							
OUAC Transaction Pos. 92-95: 9355							

OUAC G1/H1 page

Reviewing OUAC Transactions G2/H2

Access the OUAC G2/H2 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G2/H2).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD OUAC Identifier: OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status:							
G2/H2 Trans Data-Law Sec Schl							
To Date:							
From Date:							
OUAC Institution Code:							
Diploma/Degree:							
OUAC Transaction Pos. 92-95:							

OUAC G2/H2 page

Reviewing OUAC Transactions G3/H3

Access the OUAC G3/H3 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G3/H3).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD OUAC Identifier: OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status:							
G3/H3 Trans Data-Law Emrg Info							
Contact Name:							
Relationship Description:							
Home Phone #:							
Business Phone:						Ext:	
Emerg. Contact Authorization:		2 					
OUAC Transaction Pos. 92-95:							

OUAC G3/H3 page

Reviewing OUAC Transactions G4/H4

Access the OUAC G4/H4 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G4/H4).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV		
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:			
Address Line 1							
Address Line 1:							
Address Line 2:							
OUAC Transaction Pos. 92-95:							

OUAC G4/H4 page

Reviewing OUAC Transactions G5/H5

Access the OUAC G5/H5 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G5/H5).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV		
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:			
G5/H5 Trans Data-Law Emrg Info							
Address Line 3:							
Postal Code:							
Province:							
Zip:							
OUAC Transaction Pos. 92-95:							

OUAC G5/H5 page

Reviewing OUAC Transactions G6/H6

Access the OUAC G6/H6 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G6/H6).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV		
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:			
G6/H6 Transaction Data - Law							
Category 1:		Status:	☐	Category 5:		Status:	☐
Category 2:		Status:	☐	Category 6:		Status:	☐
Category 3:		Status:	☐	Category 7:		Status:	☐
Category 4:		Status:	☐	Category 8:		Status:	☐
OUAC Transaction Pos. 92-95:							

OUAC G6/H6 page

Reviewing OUAC Transactions G7/H7

Access the OUAC G7/H7 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G7/H7).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV		
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:			
G7/H7 Transaction Data - Law							
Program of Study:		Offer Date:					
Status:	☐	Response Due Date:					
Cancel Date:		Response Date:					
Law Decision:	Offer						
Offer Response:	Accept						
OUAC Transaction Pos. 92-95:							

OUAC G7/H7 page

Reviewing OUAC Transactions G8/H8

Access the OUAC G8/H8 page (Student Admissions, OUAC, Transactions, Transactions G/H, OUAC G8/H8).

OUAC G1/H1	OUAC G2/H2	OUAC G3/H3	OUAC G4/H4	OUAC G5/H5	OUAC G6/H6	OUAC G7/H7	OUAC G8/H8
Trans ID: OUAC_UAS_ADD OUAC Identifier: OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status:							
G8/H8 Transaction Data - Law							
Previous Year Applied 1:		Previous Year Applied 3:					
Previous Year Applied 2:		Law Fee Waiver Received:					
All OLSAS Applications							
Osgoode: Active		Queen's: Withdrawn		Western: Active			
Ottawa: Active		Toronto: Withdrawn		Windsor: Withdrawn			
OUAC Transaction Pos. 92-95:							

OUAC G8/H8 page

Reviewing and Editing the OUAC Transaction J-N Staging Tables

This section discusses how to use the OUAC Transactions J-N component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction J-N Staging Tables

Page Name	Definition Name	Navigation	Usage
OUAC J/K	OUAC_J_K_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J/K	Review and edit OUAC transaction data.
OUAC J1/K1	OUAC_J1_K1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J1/K1	Review and edit OUAC transaction data.
OUAC J2/K2	OUAC_J2_K2_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J2/K2	Review and edit OUAC transaction data.
OUAC J3/K3	OUAC_J3_K3_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J3/K3	Review and edit OUAC transaction data.
OUAC J4/K4	OUAC_J4_K4_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J4/K4	Review and edit OUAC transaction data.

Page Name	Definition Name	Navigation	Usage
OUAC J5/K5	OUAC_J5_K5_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J5/K5	Review and edit OUAC transaction data.
OUAC L1/N1	OUAC_L1_N1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC L1/N1	Review and edit OUAC transaction data.
OUAC M1	OUAC_M1_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M1	Review and edit OUAC transaction data.
OUAC M2	OUAC_M2_PNL	Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M2	Review and edit OUAC transaction data.

Reviewing OUAC Transactions J/K

Access the OUAC J/K page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J/K).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1	
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense								
J/K Transaction Data - LSAT Find View All First 1 of 1 Last								
Score:	Upper Band:	Lower Band:	Irregularity Code:	Percentile Rank:	Test Date:			
			Abs Delay					
			Cand Cncl					
			Handicap					
OUAC Transaction Pos. 92-95:								

OUAC J/K page

Reviewing OUAC Transactions J1/K1

Access the OUAC J1/K1 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J1/K1).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
J1/K1 Transaction Data - LSAT							
Applicant Reported LSAT Code:				LSAT Actual Access Code:			
Applicant Reported LSAT Score:				LAW Ethnicity:		Asian v	
Applicant Reported Test Date:				LAW Negative Service Indicatr:			
Plan to Write LSAT:				LSAT Trans Flag:			
LSAT Future Test 1:				LSAT Average Score:			
LSAT Future Test 2:				LSAT Highest Score:			
LSAT Future Test 3:				LSAT # Written:			
LSAT Score Band - Upper:				LSAT Score Band - Lower:			
OUAC Transaction Pos. 92-95:							

OUAC J1/K1 page

Reviewing OUAC Transactions J2/K2

Access the OUAC J2/K2 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J2/K2).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
J2/K2 Transaction Data - LSAT							
Score:	Upper Band:	Lower Band:	Irregularity Code:	Percentile Rank:	Test Date:		
			Hndcp Cncl v			31	
			Hold v			31	
			LSAC Cncl v			31	
OUAC Transaction Pos. 92-95:							

OUAC J2/K2 page

Reviewing OUAC Transactions J3/K3

Access the OUAC J3/K3 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J3/K3).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
J3/K3 Transaction Data - LSAT							
Score:	Upper Band:	Lower Band:	Irregularity Code:	Percentile Rank:	Test Date:		
			No Meaning				
			Sec Cncl				
			Security				
OUAC Transaction Pos. 92-95:							

OUAC J3/K3 page

Reviewing OUAC Transactions J4/K4

Access the OUAC J4/K4 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J4/K4).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
J4/K4 Transaction Data - LSAT							
Score:	Upper Band:	Lower Band:	Irregularity Code:	Percentile Rank:	Test Date:		
OUAC Transaction Pos. 92-95:							

OUAC J4/K4 page

Reviewing OUAC Transactions J5/K5

Access the OUAC J5/K5 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC J5/K5).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1	
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV								
OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense								
J5/K5 Transaction Data - LSAT								
Score:	Upper Band:	Lower Band:	Irregularity Code:	Percentile Rank:	Test Date:			
OUAC Transaction Pos. 92-95:								

OUAC J5/K5 page

Reviewing OUAC Transactions L1/N1

Access the OUAC L1/N1 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC L1/N1).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1	
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV								
OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense								
L1/N1 Transaction Data								
Last Name:								
Last Name FROM:								
OUAC Transaction Pos. 92-95:								

OUAC L1/N1 page

Reviewing OUAC Transactions M1

Access the OUAC M1 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M1).

OUAC J/K	OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1
Trans ID: OUAC_UAS_ADD OUAC Identifier: M1 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
M1 Data - Secondary School							
OUAC Community Involvement:		☐		May OAC Courses:		☐	
OUAC Secndry Schl Literacy Tst:		☐		May OAC Credits:			
Grades Collection Period:		Appl		Jul OAC Credits:			
Total OAC Credits Reported:		7.00		Jul OAC Courses:			
Feb OAC Courses:		☐		Degree Status:		Complete	
Feb OAC Credits:				Mident Code:		855685	
OUAC Transaction Pos. 92-95:		9355					

OUAC M1 page

Reviewing OUAC Transactions M2

Access the OUAC M2 page (Student Admissions, OUAC, Transactions, Transaction J - N, OUAC M2).

OUAC J1/K1	OUAC J2/K2	OUAC J3/K3	OUAC J4/K4	OUAC J5/K5	OUAC L1/N1	OUAC M1	OUAC M2
Trans ID: OUAC_UAS_ADD OUAC Identifier: M2 OUAC Dist. Nbr.: 14 Institution: PSUNV OUAC Ref#: 20000041720 OUAC Appl. Nbr.: 02 OUAC Process Status: Suspense							
M2 Transaction Data - Secondary School							
Find View All First 1 of 21 Last							
School Course Nbr:		BAC0A1		Course Delivery:		Day School	
OUAC To Date - YYYYMM:		199906		Course Type:		Not Co-Op	
Units Taken:		1.00		Course Status:		CRS	
Grade Input:		075		Action Code:		A	
Transcript Status:		Final		Mident Code:		855685	
Marks Source Indicator:		D		Course Notes:			
Language of Instruction:							
OUAC Transaction Pos. 92-95:		9355					

OUAC M2 page

Reviewing and Editing the OUAC Transaction P-R Staging Tables

This section discusses how to use the OUAC Transactions P-R component to review and edit OUAC transaction data.

Pages Used to Review and Edit the OUAC Transaction P-R Staging Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC PI	OUAC_PI_PNL	Student Admissions, OUAC, Transactions, Transaction P- R	Review and edit OUAC transaction data.
OUAC R/S	OUAC_R_S_PNL	Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R/S	Review and edit OUAC transaction data.
OUAC R1/S1	OUAC_R1_S1_PNL	Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R1/S1	Review and edit OUAC transaction data.
OUAC R2/S2	OUAC_R2_S2_PNL	Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R2/S2	Review and edit OUAC transaction data.
OUAC R3/S3	OUAC_R3_S3_PNL	Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R3/S3	Review and edit OUAC transaction data.
OUAC R4/S4	OUAC_R4_S4_PNL	Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R4/S4	Review and edit OUAC transaction data.

Reviewing OUAC Transactions PI

Access the OUAC PI page (Student Admissions, OUAC, Transactions, Transaction P- R).

OUAC PI

OUAC R/S

OUAC R1/S1

OUAC R2/S2

OUAC R3/S3

OUAC R4/S4

Trans ID:

OUAC_UAS_ADD

OUAC Identifier:

OUAC Dist. Nbr.: 14

Institution: PSUNV

OUAC Ref#:

20000041720

OUAC Appl. Nbr.:

02

OUAC Process Status:

PI Transaction Data - Educational History - OUAC

Find | View All

First

1 of 1

Last

OUAC Institution Code:

Diploma/Degree:

+

-

From Date:

Prev. Stdnt Id:

To Date:

Action Code:

External Academic Level:

Transcript Flag:

Program of Study:

Degree Date:

OUAC Transaction Pos. 92-95:

OUAC PI page

Reviewing OUAC Transactions R/S

Access the OUAC R/S page (Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R/S).

OUAC PI

OUAC R/S

OUAC R1/S1

OUAC R2/S2

OUAC R3/S3

OUAC R4/S4

Trans ID:

OUAC_UAS_ADD

OUAC Identifier:

OUAC Dist. Nbr.: 14

Institution: PSUNV

OUAC Ref#:

20000041720

OUAC Appl. Nbr.:

02

OUAC Process Status:

R/S Transaction Data - OUAC

Find | View All

First

1 of 1

Last

OUAC R/S First 3 data pos.:

+

-

OUAC R/S Transaction Data:

OUAC Transaction Pos. 92-95:

OUAC R/S page

Reviewing OUAC Transactions R1/S1

Access the OUAC R1/S1 page (Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R1/S1).

OUAC PI	OUAC R/S	OUAC R1/S1	OUAC R2/S2	OUAC R3/S3	OUAC R4/S4
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:	
R1/S1 Transaction Data - Law - OUAC Find View All First 1 of 1 Last					
Undergrad Record Verified: ☐		Exceptions Noted: ☐		+ -	
Graduate Transcript Indicator: ☐		Less Than Full Course Load: ☐			
Grad Verified: ☐		More Than Full Course Load: ☐			
Unit Taken:		Supplementary Course Lengths:			
Grade Points:		Supplementary Course Values:			
GPA:		Supplementary Course GPA:			
Percent:		Supplementary Course Percent:			
OUAC Transaction Pos. 92-95:					

OUAC R1/S1 page

Reviewing OUAC Transactions R2/S2

Access the OUAC R2/S2 page (Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R2/S2).

OUAC PI	OUAC R/S	OUAC R1/S1	OUAC R2/S2	OUAC R3/S3	OUAC R4/S4
Trans ID: OUAC_UAS_ADD		OUAC Identifier:		OUAC Dist. Nbr.: 14	Institution: PSUNV
OUAC Ref#: 20000041720		OUAC Appl. Nbr.: 02		OUAC Process Status:	
R2/S2 Transaction Data - Law - OUAC Find View All First 1 of 1 Last					
Sequence:		+ -			
OUAC From Date - YYYYMM:		Degree Date:			
OUAC To Date - YYYYMM:		Degree Expected: ☐			
OUAC Institution Code:		Degree Type: 			
Program of Study:		Exceptions Noted: ☐			
Diploma/Degree Received Code:		Transcript Rcvd: ☐			
OUAC Transaction Pos. 92-95:					

OUAC R2/S2 page

Reviewing OUAC Transactions R3/S3

Access the OUAC R3/S3 page (Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R3/S3).

OUAC PI

OUAC R/S

OUAC R1/S1

OUAC R2/S2

OUAC R3/S3

OUAC R4/S4

Trans ID:

OUAC_UAS_ADD

OUAC Identifier:

OUAC Dist. Nbr.: 14

Institution:

PSUNV

OUAC Ref#:

20000041720

OUAC Appl. Nbr.:

02

OUAC Process Status:

R3/S3 Transaction Data - Law - Institution Totals - OUAC

Find | View All

First

1 of 1

Last

Sequence:

+

-

OUAC Reported Cumulative Avg:

Units Taken:

Grade Points:

GPA:

Percent Value:

OUAC Transaction Pos. 92-95:

OUAC R3/S3 page

Reviewing OUAC Transactions R4/S4

Access the OUAC R4/S4 page (Student Admissions, OUAC, Transactions, Transaction P- R, OUAC R4/S4).

OUAC PI

OUAC R/S

OUAC R1/S1

OUAC R2/S2

OUAC R3/S3

OUAC R4/S4

Trans ID:

OUAC_UAS_ADD

OUAC Identifier:

OUAC Dist. Nbr.: 14

Institution:

PSUNV

OUAC Ref#:

20000041720

OUAC Appl. Nbr.:

02

OUAC Process Status:

R4/S4 Transaction data - Law - Yearly Totals

Find | View All

First

1 of 1

Last

Sequence:

+

-

Term Year:

GPA:

Year Duration:

Percent Value:

GPA Type:

Reported Avg:

Units Taken:

Exceptions Noted:

Grade Points:

OUAC Transaction Pos. 92-95:

OUAC R4/S4 page

Reviewing and Editing the OUAC Transaction T Staging Table

This section discusses how to use the OUAC T1 page to review and edit OUAC transaction data.

Page Used to Review and Edit the OUAC Transaction T Staging Table

Page Name	Definition Name	Navigation	Usage
OUAC T1	OUAC_T1_PNL	Student Admissions, OUAC, Transactions, Transactions T1	Review and edit OUAC transaction data.

Using the OUAC T1 Page

Access the OUAC T1 page (Student Admissions, OUAC, Transactions, Transactions T1).

OUAC T1

Trans ID: OUAC_UAS_ADD **OUAC Identifier:** **OUAC Dist. Nbr.:** 14 **Institution:** PSUNV

OUAC Ref#: 20000041720 **OUAC Appl. Nbr.:** 02 **OUAC Process Status:**

T1 Transaction Data - OUAC Find | View All First 1 of 1 Last

Sequence:

School Course Nbr:

OUAC Course Title:

OUAC Course Weight:

Action Code:

OUAC Transaction Pos. 92-95:

OUAC T1 page

Viewing Search/Match and OUAC Processing Statuses

You can use the OUAC Suspense page to view the status of an OUAC application record and to view messages that are generated by the posting process. This section discusses how to use the OUAC Suspense page.

Page Used to View Search/Match and OUAC Processing Statuses

Page Name	Definition Name	Navigation	Usage
OUAC Suspende	OUAC_SUSP_PNL	Student Admissions, OUAC, Processes, Suspense Data	View the status of an OUAC application record, and to view messages when generated by the posting process. For example, you can determine if a record is waiting to be processed, if a record instigated a new person to be added to your database, or if any errors were encountered during the search/match or loading processes.

Using the OUAC Suspende Page

Access the OUAC Suspende page (Student Admissions, OUAC, Processes, Suspense Data).

OUAC Suspende

Trans ID: OUAC_UAS_ADD **OUAC Identifier:** A4 **OUAC Process Status:** Suspense
OUAC Ref#: 20000041720 **OUAC Appl. Nbr.:** 02 **OUAC Dist. Nbr.:** 14

Suspende Data

Search/Match Processing Option: Complete **OUAC Process Status:** Suspense
ID: 0022 **Search Order Nbr:** **Matches:**
Social Insurance #: **Birthdate:** 05/03/1981 **Gender:** Male
Name:
Address Line 1:
Address Line 3:
Message Set Number: 14210 **Message Number:** 4
Message Text: The OUAC Institution code does not exist in the external org table.

OUAC Suspende page

Search/Match Processing Option

Displays the status of the record after the Search/Match process.

Complete: The process was completed without errors.

Error: The process encountered errors.

Perform: The process has not run yet.

OUAC Process Status

Select the status that you want for this record. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort. The delivered values are *EDI Loaded*, *Loaded*, *Posted*, *Reviewed*, and *Suspense*. For example, if you change the status to *Loaded*, the next time that you run the post process, this record would post to the database—because the post process posts any file with a status of *Loaded*. If you do not want the record to remain in suspense status and do not want to post it to the database at a later date, select *Reviewed*.

ID

Enter an ID to merge this record with an existing ID type. If the system suspended the record after it performed the search and discovered a match for one ID, that ID displays here.

If the system finds more than one match, the search order number appears and the number of matches appear in the Matches display-only field.

Posting OUAC Transaction Data

This process picks up all the transactions in Loaded status and posts the data to the PS Core tables. It creates separate applications for each OUAC reference number/application number that is not a 101 applicant. For 101 applicants it creates separate program numbers.

To post OUAC transaction data:

- Set search parameters for posting OUAC data.
- Set OUAC post parameters.
- Set defaults for posting OUAC data.
- Set more post parameters.

Pages Used to Post OUAC Transaction Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Post ParmS (OUAC post parameters)	OUAC_POST_PARMs	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post ParmS	Define default values for admit type, application center, academic career, and campus.
OUAC Post ParmS2 (OUAC post parameters2)	OUAC_POST_PARMs2	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post ParmS2	Define application and transcript posting defaults.

Page Name	Definition Name	Navigation	Usage
OUAC Post Parms BC (OUAC post parameters BC)	OUAC_POST_PARMS_BC	Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parms BC	Assign transcript status values.

Setting Search Parameters for Posting OUAC Data

Use the Search Parms (search parameters) page to set up your search/match parameters for processing the OUAC staging tables.

See Also

Chapter 18, "Performing EDI TS130 Transcript Transactions," Setting Up Search/Match Parameters, page 306

Setting OUAC Post Parameters

Access the OUAC Post Parms (OUAC post parameters) page (Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parms).

OUAC Post Parms page

Admit Type

Select the default admit type for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The admit type that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define admit types on the Admit Types Table page.

Application Center

Select the default application center for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The application center that you enter here is the default on the Application Data page (the ADM_APPL_DATA record). Define application centers on the Application Center Table page.

Academic Career

Select the default academic career for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The academic career that you enter here is the default in the ADM_APP_CAR_SEQ record. Define academic careers on the Academic Career Table page.

Campus

Select the default campus for all OUAC transactions concerning each of the following categories of students: undergraduates (UAS), part-time (PTIM), teacher's college (TEAS), and law (OLSAS). The campus that you enter here is the default on the Application Program page (the ADM_APPL_PROG record). If you do not select a campus here, the default is the default campus attached to the applicant's academic program. Define campuses on the Campus Table page.

Setting Defaults for Posting OUAC Data

Access the OUAC Post Parm2 (OUAC post parameters2) page (Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Parm2).

Search Parm	OUAC Post Parm	OUAC Post Parm2	OUAC Post Parm BC
Run Control ID: 1 Report Manager Process Monitor Run			
Application Defaults			
Notification Plan: Regular		Application Method: Hard Copy	
Fee Type: Standard		Default Admit Term: 2040	
Acad Load: Full-Time		Acad Level: Graduate	
Transcript Defaults			
Degree Date: 06/03/2008		Grade Input:	
Find View All First 1 of 1 Last			
Transcript Status: In Progress		Data Source: School	
		Data Medium: Hard Copy	

OUAC Post Parm2 page

Notification Plan	Select the notification plan that you want entered for these applications during the posting process. A notification plan specifies whether this person should be on a regular or special notification track. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Early Admt</i> (early admit), <i>Regular</i> , and <i>Rolling</i> .
Application Method	Select the application method that you want entered for these applications during the posting process. Application methods indicate how or in what form this application was received. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Appl Serv</i> (application server), <i>Diskette</i> , <i>EDI</i> (electronic data interchange), <i>Hard Copy</i> , <i>OUAC</i> (Ontario Universities Application Center), <i>Web Appl</i> (web application).
Fee Type	Select the fee type you want entered for these applications during the posting process. Fee types enable you to charge varying user-defined application fees. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are <i>Internatnl</i> (international) and <i>Standard</i> .
Default Admit Term	Select a default admit term for OUAC transactions that transmit term information without a term date. Term Date is a required field in PeopleSoft applications.
Acad Load (academic load)	Select the academic load that you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.
Acad Level (academic level)	Select the academic level that you want entered for these applications during the posting process. Values for this field are delivered with your system as translate values. You can modify these translate values.
Degree Date	Select a default degree date for OUAC transactions that transmit degree information without a degree date. Degree Date is a required field in PeopleSoft applications.
Grade Input	Enter a default grade for OUAC transactions that transmit courses without a grade. <i>Grade</i> is a required field in PeopleSoft applications.
Transcript Status	Select a transcript status. The data source and data medium that you select is the default for the transcript status that you select here. Insert rows to add subsequent transcript statuses.
Data Source	Select a default data source for the transcript status in this row of data.
Data Medium	Select a default data medium for the transcript status in this row of data.

Setting More Post Parameters

Access the OUAC Post Params BC (OUAC post parameters BC) page (Student Admissions, OUAC, Processes, Post OUAC Data, OUAC Post Params BC).

Search Params

OUAC Post Params

OUAC Post Params2

OUAC Post Params BC

Run Control ID: 1

[Report Manager](#) [Process Monitor](#)

Run

School % Crse Trans Stat:

In Progrss

Prov. Exam % Trans Stat:

Final

Prov. Blended % Trans Stat:

Incomplete

Prov. Interim % Trans Stat:

BC Honours Category:

Laude

OUAC Post Params BC page

School % Crse Trans Stat (school % course translate status)	Assign a transcript status to the final percentage assigned by the school.
Prov. Exam % Trans Stat (province exam % translate status)	Assign a transcript status to the exam percentage assigned by the province.
Prov. Blended % Trans Stat (province blended % translate status)	Assign a transcript status to the blended percentage.
Prov Interim % Trans Stat (province interim % translate status)	Assign a transcript status to the interim percentage assigned by the school.
BC Honours Category	Enter a default for applicants who have earned honors standing. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered values are <i>Laude</i> , <i>Magna</i> , <i>None</i> , and <i>Summa</i> .

Note. If you assign the same transcript status to the percentage fields above, the incoming marks data does not create a new row, but, instead, overwrites the old one. Assigning a different transcript status to these fields ensures that marks are populated correctly.

Viewing OUAC Messages

This section discusses how to view OUAC messages.

Page Used to View OUAC Messages

Page Name	Definition Name	Navigation	Usage
OUAC Process Messages Table	OUAC_PRCs_MSG_TBL	Student Admissions, OUAC, Processes, OUAC Messages	View errors generated during the posting process.

Using the OUAC Messages Page

Access the OUAC Process Message Table page (Student Admissions, OUAC, Processes, OUAC Messages).

OUAC Process Message Table

Find | View All First 1 of 1 Last

Instance: **Institution:** **ID:** **Appl Nbr:**

OUAC Ref#: **OUAC Appl. Nbr.:** **OUAC Identifier:** **Get Results**

Process Instance: **Application Nbr:**

ID:

OUAC Ref#: **OUAC Appl. Nbr.:** **OUAC Identifier:**

User ID: **Run Date/Time:**

Message Severity: **Message Set:** **Message Nbr:**

Message Text:

Description:

Value of Field in Error:

OUAC Process Message Table page

Select the following criteria for which you want to search for OUAC process messages: Instance, Institution, ID, Appl Nbr (application number), OUAC Ref# (OUAC reference number) OUAC Appl Nbr (OUAC application number), and OUAC Identifier.

Reviewing Overflow OUAC Application Information

Use the OUAC Application Data component to view overflow OUAC data. The data that appears in this component has no natural home in PeopleSoft core tables — it therefore appears here. Thus, for students posted through OUAC, the OUAC Application Data component is an extension of their application.

This section discusses how to:

- Review general OAUC application data.
- Review OUAC law application information.
- Review OUAC law categories.

Pages Used to Review Overflow OUAC Application Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OUAC Application Data	OUAC_APPL_DATA	Student Admissions, OUAC, OUAC Application	View overflow OUAC application data.
OUAC Law Application Data	OUAC_APPL_DATA_LAW	Student Admissions, OUAC, OUAC Application, OUAC Law Application Data	Review overflow OUAC law application data.
OUAC Appl Law Cat (OUAC application law category)	OUAC_APPL_LAW_CAT	Student Admissions, OUAC, OUAC Application, OUAC Appl Law Cat	View OUAC law categories.

Reviewing General OUAC Application Data

Access the OUAC Application Data page (Student Admissions, OUAC, OUAC Application).

OUAC Application Data		OUAC Law Application Data		OUAC Appl Law Cat	
Chadwick Forde		0022			
Academic Career: Undergraduate		Application Nbr: 00024160			
Application Data					
OUAC Ref#:	20000041720	Postsecondary:	No		
OUAC Release:	Yes	Admit Basis:	110		
Adv Std Program:		Adv Std Year:			
Cntry Eng Schl:	CAN	CEGEP Code:			
Yrs Eng School:	13	Yrs in High Sch:	5		
OUAC Choice Find View All First 1 of 1 Last					
OUAC Appl. Nbr.:	02	OUAC Choice:	2	Prog Nbr:	0 ED
Subject Area:	080				

OUAC Application Data page

Reviewing OUAC Law Application Information

Access the OUAC Law Application Data page (Student Admissions, OUAC, OUAC Application, OUAC Law Application Data).

OUAC Application Data		OUAC Law Application Data		OUAC Appl Law Cat	
Chadwick Forde		0022			
Academic Career: Undergraduate		Application Nbr: 00024160			
Application Data					
OUAC Ref#:	20000041720	Offer Date:	02/07/2005	Law Fee Waiver Received	☐
Attended Law:	Not Report	Emerg Auth.:	Not Report	Withdrawn Law:	No
Less Than Full Course Load:	☐	More Than Full Course Load:	☐	Spplmnty Units:	
Grade In/Official:	☐	LSAT Number Times Written:		Spplmnty Value:	
Units Taken:		Exceptions Noted:	☐	Supplmentry GPA:	
Grade Points:		GPA:		Percent:	
All OLSAS Applications					
Osgoode:	Active	Ottawa:	Active	Queen's:	Withdrawn
Toronto:	Active	Western:		Windsor:	

OUAC Law Application Data page

Reviewing OAUC Law Categories

Access the OUAC Appl Law Cat page (Student Admissions, OUAC, OUAC Application, OUAC Appl Law Cat).

OUAC Application Data

OUAC Law Application Data

OUAC Appl Law Cat

Chadwick Forde

0022

Academic Career: Undergraduate

Application Nbr: 00024160

Application Data

OUAC Ref#: 20000041720

OUAC Category 1:

Status:

OUAC Category 2:

Status:

OUAC Category 3:

Status:

OUAC Category 4:

Status:

OUAC Category 5:

Status:

OUAC Category 6:

Status:

OUAC Category 7:

Status:

OUAC Category 8:

Status:

OUAC Appl Law Cat page

Chapter 24

(GBR) Managing UCAS and GTTR Applications

This chapter provides an overview of Universities and Colleges Admissions Service (UCAS) and Graduate Teacher Training Registry (GTTR) data processing, and discusses how to:

- Prepare for UCAS and GTTR data processing.
- Process UCAS and GTTR reference data.
- Import UCAS and GTTR applications and applicant data.
- Review imported UCAS and GTTR applications and applicant data.
- Process imported UCAS and GTTR applications and applicant data.

Understanding UCAS and GTTR Data Processing

UCAS is the UK central body that receives and processes admission applications. Applicants apply to UCAS. UCAS then distributes the applications to the institutions. Institutions communicate the admission decision to UCAS rather than directly to the applicant.

UCAS provides an Open Database Connectivity (ODBC) link to which participating institutions can connect to import applications and send back admission decision details to UCAS. UCAS then communicates the decision details to the applicants. PeopleSoft Campus Solutions enables you to connect to the UCAS database to import full-time undergraduate (FTUG) and GTTR applications, process the imported applications, and send back the admission decision details to UCAS.

UCAS provides database views through which institutions import data. For example, the ivStarA database view contains the applicant's contact details, including address and phone number. Refer to the ODBC-link Technical Manual for information about the database views, its field descriptions, and the transactions that are exchanged between UCAS and the academic institution. This manual is available to UCAS subscribers from the UCAS website.

See <http://www.ucas.ac.uk..>

To import and process UCAS and GTTR applications:

1. Set up options, including the database link to UCAS.
2. Import reference data, such as ethnic codes, country codes, and application statuses, from UCAS.

3. Review the imported reference data.

In some cases, you must map the reference data to the Campus Solutions data, for example, UCAS country codes to Campus Solutions country codes.

4. Import applications and applicant data from UCAS.

5. Review and correct errors in the imported applications.

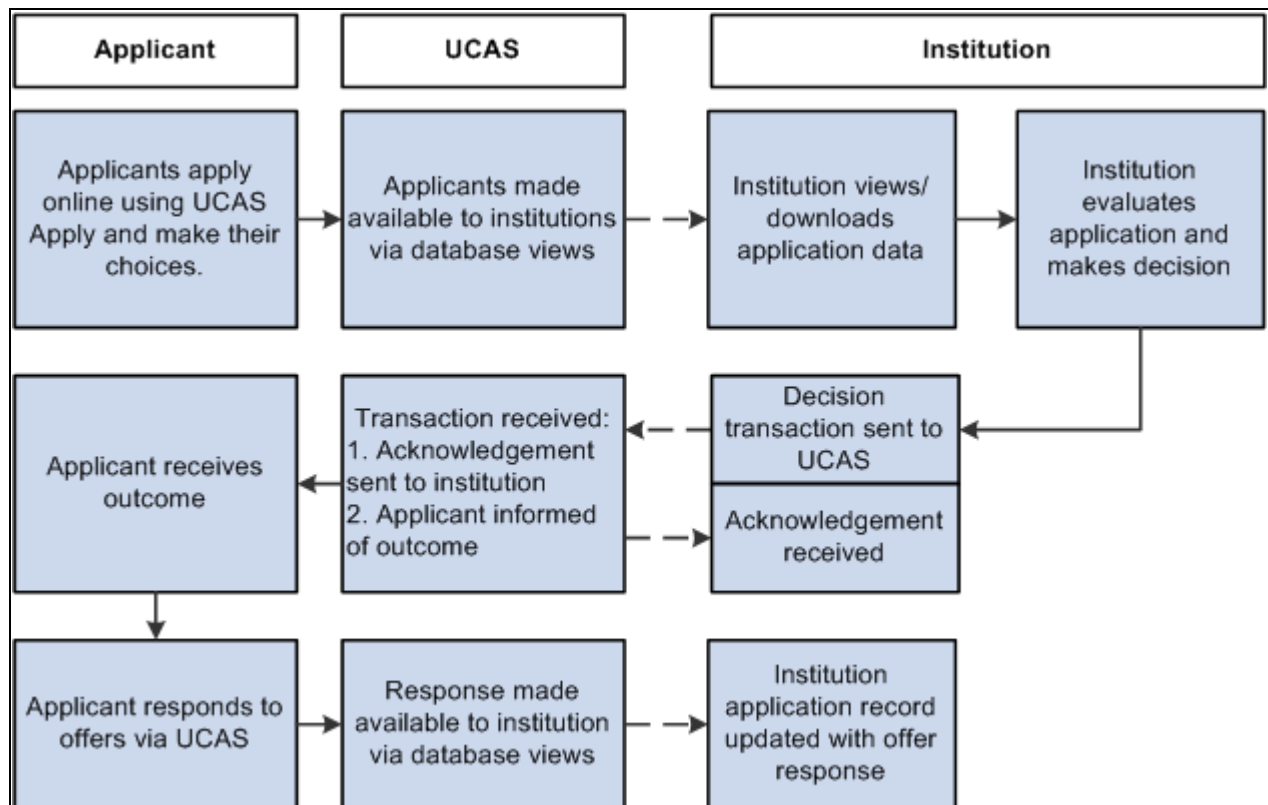
6. Enter admission decisions for the imported applications.

7. Communicate the decisions back to UCAS as transactions.

8. Import any changes to the applicant or applications data maintained by UCAS.

Data changes that you import from UCAS could be offer responses.

Each combination of an institution and a UCAS course is referred to as a *choice*. This diagram provides an overview of the process:



Process flow of importing and processing UCAS applications

When the applicant responds to an offer and when his or her exam results are available, the institution confirms or rejects the conditional offer by comparing the applicant's exam results with the conditions. Campus Solutions enables you to import the exam results, match the results with the offer conditions and process Confirmation decisions.

An applicant who does not have an admission offer becomes eligible for Clearing. Also, an applicant can register with UCAS for Adjustment if he or she wants to apply for another course. Campus Solutions supports Confirmation, Clearing, and Adjustment processing for 2009 admissions cycle onwards.

The *UCAS Admissions Guide* and *Decision Processing Manual* provide more information about Confirmation, Clearing, and Extra. This guide and manual are available to subscribers from the UCAS website.

Common Elements Used in This Chapter

Personal Information	Click to access the Add/Update a Person component (SCC_BIO_DEMO) where you can view and maintain the person records that the system creates for the imported applicants.
Applicant Summary	Click to access the Applicant Summary page where you can view the imported applicant data.
Maintain Applications	Click to access the Maintain Applications component (ADM_APPL_MAINTNCE) where you can view and maintain the Campus Solutions admission application records that the system creates for the imported applications.
Choice Details	Click to access the Choices page where you view the applicant's imported application choices and a summary of the related Campus Solutions application records.
Decision Entry	Click to access the Initial Decision Entry page where you can enter an admission decision for an imported application choice.
Application Notes	Click to access the Application Notes page where you can view all the key application choice information on a single page and add notes.

Preparing for UCAS and GTTR Data Processing

Before you can import and process UCAS and GTTR data, you must set up your system as follows:

- Enable the UK fields for all institutions.
- Enable the UK fields for a specific institution.
- Set up script text for UCAS Confirmation and Clearing enquiries.
- Set up phone numbers for UCAS Confirmation and Clearing enquiries.
- Set up UCAS and GTTR options.
- Set up UCAS and GTTR application import defaults.
- Set up UCAS and GTTR decision approval options.
- Set up UCAS and GTTR program action reasons.
- Set up UCAS and GTTR program action reasons for Confirmation, Clearing, and Adjustment.

- Set up outcomes for enquiries and notes.
- Map UCAS attendance types.
- Map UCAS and GTTR entry years and months.
- Map UCAS entry points.
- Map UCAS housing interest.
- Define external systems.
- Set up UCAS and GTTR user defaults.
- Set up National ID Types for country code GBR.

Note. If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing those integrations. Setting up National ID Types as detailed in this PeopleBook chapter may vary depending on how you configure your systems. The CS-HCM Integration Information Knowledge Document details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

CS-HCM Integration Information posted to My Oracle Support (<https://support.oracle.com>)

Pages Used to Prepare for UCAS and GTTR Data Processing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Enable the UK-specific fields on the Campus Solutions pages for all institutions.
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6	Enable the UK-specific fields on the Campus Solutions pages for a specific institution.
Program Action Reason Table	PROG_RSN_TBL	Set Up SACR, Product Related, Student Records, Program Action, Program Action Reason Table	Set up program action reasons for UCAS and GTTR. Also, set up the script text for UCAS program action reasons. Your institution's employees can read aloud this script text to applicants during Confirmation and Clearing enquiries.

Page Name	Definition Name	Navigation	Usage
Application Center	ADM_APPLCTR_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table	Set up the application centers for UCAS and GTTR applications. Enter the phone numbers that UCAS applicants can call to enquire about Confirmation and Clearing in your institution.
UCAS Configuration	SAD_UC_CONFIG	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Configuration	For an institution, set up the UCAS institution code, current admissions cycle year, application import options, address usage value, and link to the UCAS database.
UCAS Application Import	SAD_UC_CONFIG2	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Application Import	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the ivStarC application data.
GTTR Application Import	SAD_UC_GT_CONFIG	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Application Import	For an institution, set up the default values that the import process uses to create the Campus Solutions application records for the ivgStarG application data.
UCAS Decision Approval	SAD_UC_DECN_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Decision Approval	Indicate whether approval is required for UCAS application, Confirmation, and Release into Clearing decisions.
GTTR Decision Approval	SAD_UC_GDEC_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Decision Approval	Indicate whether approval is required for GTTR application decisions.
UCAS Program Actions	SAD_UC_UPRG_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Program Actions	Define the program actions and reason values that the system uses when an update to a UCAS application choice requires an update to the program action and action reason values of the corresponding Campus Solutions application record.

Page Name	Definition Name	Navigation	Usage
GTTR Program Actions	SAD_UC_GPRG_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Program Actions	Define the program actions and reason values that the system uses when an update to a GTTR application choice requires an update to the program action and action reason values of the corresponding Campus Solutions application record.
UCAS Confirmation	SAD_UC_CONF_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Confirmation	Define the program actions and reason values that the system uses for UCAS Confirmation, Clearing, and Adjustment.
GTTR Confirmation	SAD_UC_GCNF_SETUP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Confirmation	Define the program actions and reason values that the system uses for GTTR Confirmation processing and for Clearing Elsewhere.
Outcome Codes	SAD_UC_OUTCMCDS	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Outcome Code	Define the outcome codes that you can use to classify applicant enquiries and application notes.
Attendance Type	SAD_UC_ATTTYPEM	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Attendance Type	Map UCAS attendance types to Campus Solutions academic levels. The system uses this mapping when you import ivEducation and ivgEducation data to create Campus Solutions external education records.
Entry Year	SAD_UC_ENTRYYRM	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Entry Year	Map UCAS entry year and month to a Campus Solutions admit term. You can map multiple combinations of entry year and month to a Campus Solutions admit term. You define admit terms on the Term Table page. For information about defining term tables, see <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i> , "Establishing Terms and Sessions."

Page Name	Definition Name	Navigation	Usage
Entry Point	SAD_UC_ENT_PT	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Entry Point	Map UCAS entry points to Campus Solutions academic levels and careers. The system uses this mapping when you import UCAS applications and when you create transactions to send to UCAS.
Home	SAD_UC_HOME	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Home	Map UCAS home values to Campus Solutions housing interest values. The system uses this mapping to populate the Housing Interest values in the Campus Solutions application records when you import UCAS applications.
UCAS, GTTR Defaults	SAD_UC_USR_DEFAULT	Set Up SACR, User Defaults, UCAS, GTTR Defaults	Set up user defaults that aid in data entry and search.
External System	SCC_EXT_SYS_TBL	Setup SACR, Product Related, Campus Community, Define Campus Community, Set Up, Define External Systems	Specify the external systems for UCAS.
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type	Assign UCASID and GTTRID national ID types to the country code GBR.

Enabling the UK Fields for All Institutions

Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

Installation Student Admin

SA Features

Installation Student Administration

CRM Integration

☒ CRM for Higher Education

Australia

☒ DEST, HECS, Centrelink, TAC Last CART Request ID:

Canada

☐ Government Reporting ☐ OUAC

New Zealand

☐ NSI and SDR Personal Data, SDR Degree

The Netherlands

☐ Use Dutch Functionality

United Kingdom

☒ HESA, UCAS
☒ PBI

SA Features page

Select the HESA, UCAS check box to enable the HESA and UCAS specific fields in the system for all academic institutions.

Enabling the UK Fields for a Specific Institution

Access the Academic Institution 6 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6).

[New Will](#)

Academic Institution 4 Academic Institution 5 **Academic Institution 6** Academic Institution 7

Academic Institution: PSUNV PeopleSoft University

[Find](#) | [View All](#) First **1 of 1** Last

Effective Date: 01/01/1900 Status: Active

Australia
☐ DEST, HECS, Centrelink, TAC
Canada
☐ Government Reporting
New Zealand
☐ Catalog, SDR, EFTS, StudyLink
☐ NZQA
Netherlands
☐ Higher Education
☐ Studielink Participant
United Kingdom
☒ HESA, UCAS
☒ PBI

Academic Institution 6 page

Select the HESA, UCAS check box to enable the HESA and UCAS specific fields in the system for a specific institution.

Setting Up Script Text for UCAS Confirmation and Clearing Enquiries

Access the Program Action Reason Table page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Program Action Reason Table).

Program Action Reason Table

SetID: PSUNV
 Program Action: ADMT Admit
 Action Reason: CONF

Find View All		First	1 of 1	Last
*Effective Date:	03/11/2011	*Status:	Active	
*Description:	Offer Conditions Met			
Short Description:	CF to UF			
Long Description:	The applicant has met the offer conditions.			
Script Text:	Congratulations on your examination results. We are pleased to offer you admission to the PeopleSoft University. Please view the decision on UCAS Track and you will receive our offer letter soon.			

Program Action Reason Table page

Long Description Enter the description that should appear on the UCAS Confirmation Enquiries page.

Script Text Enter the description that should appear as script text on the UCAS Confirmation Enquiries page.

The following is an example of how the script text appears on the Confirmation Enquiries page:

1. Enter the script text and long description for a program action reason of CONF. CONF is mapped to program action of ADMT (Admit).
2. For Accept Firm decision, select program action of ADMT and action reason of CONF on the UCAS Confirmation page of the UCAS Configuration component.
3. For an applicant, to whom your institution gave a conditional offer, enter a decision of Accept on the Confirmation Entry page (and if required, approve it).
4. Because ADMT and CONF are mapped to the Accept Firm decision, the system automatically enters CONF as the action reason for the corresponding Campus Solutions application record.
5. The CONF script text and long description appear for this applicant on the Confirmation Enquiries page.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, Setting Up Admissions Program Actions and Program Action Reasons

Setting Up Phone Numbers for UCAS Confirmation and Clearing Enquiries

Access the Application Center Table page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table).

Telephone Contact 1 Enter the phone number that should appear as the Confirmation phone number on the UCAS Confirmation Enquiries page.

Telephone Contact 2 Enter the phone number that should appear as the Clearing phone number on the UCAS Confirmation Enquiries page.

These two fields appear on the Application Center Table, regardless of whether you have selected the UCAS, HESA check box on the Academic Institution 6 and SA Features pages.

See Also

PeopleSoft Recruiting and Admissions 9.0 PeopleBook, Building Your Recruiting Structure, Setting Up Application Processing Centers

Setting Up UCAS and GTTR Options

Access the UCAS Configuration page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Configuration).

UCAS Configuration

UCAS Application Import

GTTR Application Import

Academic Institution:

PSUNV

PeopleSoft University

*UCAS Institution Code:

Z80

*UCAS Cycle:

2012

Application Import

*HESA Data Import:

Update only null values

☒ Add HESA Person fields

*Default Marital Status:

Single

☒ Update Matriculated Students

System Setup

*Database Link:

UCAS

☒ UCAS

☒ Create CAS Records

☒ GTTR

☐ Campus Used

☒ Import Live

☐ Disable Decision Link

☒ Unit Results

☐ HRMS Decision Approver

☐ Unicode

☒ Contextual Data

UCAS Configuration page (1 of 2)

Address Usage

*Correspondence Address Type:

CAMP

Campus

*Home Address Type:

HOME

Home

*Telephone Type:

HOME

Home

*Mobile phone Type:

CELL

Mobile

*Email Type:

Home

Confirmation Enquiry

☐ Automatic Save

☐ Outcome Required

UCAS Configuration page (2 of 2)

UCAS Institution Code

Enter the institution code that UCAS supplied to your institution.

UCAS Cycle

Enter the admission cycle for which you want to import data from UCAS. The system uses this value to determine the effective term for creating new person residency records for applicants.

You must enter the new cycle value when UCAS makes updated views for the new cycle available through the ODBC-link. The system uses this value to determine which new fields must be imported. For example, the system imports the new ivStarK fields added by UCAS for 2010 only if the UCAS cycle is *2010* or greater.

Application Import**HESA Data Import**

Select to indicate how the system should update or add the Instance field values in your database when you import data from ivStarJ and ivgStarJ.

Select *Update all values* to overwrite Instance field values with the imported values.

Select *Update only null values* to add imported values to Instance fields that do not have any values.

Add HESA Person Fields

Select if you want the system to add new Person HESA Data field values when you import data from ivStarJ and ivgStarJ.

Default Marital Status

Select the default marital status value that the system should assign to the imported applicant records.

Update Matriculated Students

Select if you want the system to automatically update Person HESA Data records of matriculated students when you import person data from ivStarA, ivgStarA, ivStarK, and ivgStarK.

If you do not select this check box, the system does not update the person record if the student has matriculated with an application associated with the current combination of Personal ID and Application Code. For example, suppose you import an GTTR application choice (personal ID of 10910031010 and Application Code GT02) that has a corresponding application record with a `PROG_ACTION = MATR`. In such a case, if you have selected the Update Matriculated Students check box, the system will update the applicant's personal record with the imported GTTR data. If you have not selected the check box, the system will not update the personal record with the imported GTTR data because the current application has been matriculated.

If the student has matriculated with a previous application not associated with the current combination of Personal ID and Application Code, then the system updates the personal data of the student, regardless of whether you have selected the Update Matriculated Students check box. For example, suppose you import an GTTR application choice (personal ID of 10910031010 and Application Code GT01). The applicant has a previous UCAS application choice (personal ID of 10910031010 and application code of UC01) that has a corresponding application record with a `PROG_ACTION = MATR`. In such a case, even if you have not selected the Update Matriculated Students check box, the system will update the applicant's personal record in Campus Solutions with the imported GTTR data.

System Setup

Database Link

Enter the name of the ODBC database link that the system uses to connect to UCAS.

You can create a database link to UCAS by running the following command:

```
CREATE PUBLIC DATABASE LINK link name
CONNECT TO user_name
IDENTIFIED BY password
USING 'service_name'
```

link name is the value you enter in the Database Link field of the UCAS Configuration page.

UCAS supplies the *link name*, *user_name*, *password*, and *service_name* values to institutions.

Refer to the ODBC-link Technical Manual for more information about connecting to the UCAS database.

UCAS	Select if you want to import UCAS applicant and application data. If you do not select this check box, the import process does not load the UCAS data into the Campus Solutions tables. The UCAS-specific pages (such as the UCAS Decision Approval page) appear on the UCAS Configuration component only if you select this check box.
GTTR	Select if you want to import GTTR applicant and application data. If you do not select this check box, the import process does not load the GTTR data into the Campus Solutions tables. The GTTR-specific pages (such as the GTTR Decision Approval page) appear on the UCAS Configuration component only if you select this check box.
Import Live	Select if you want to import live data from UCAS or GTTR into the Campus Solutions tables through the staging tables. UCAS data that contains errors will remain in the staging table. If you do not select this check box, the import process posts the data from the staging tables to the Campus Solutions tables. For example, clear this check box if you have corrected the staging data and now you want to load the staging table data into the Campus Solutions tables.
Unit Results	Select if you want to import unit grade results of your applicants from ivUnitResults.
Unicode	Select if you want to import data from the Unicode version of applicant views.
Create CAS Records	Select if you want the import process to automatically create a CAS record for a Campus Solutions application when the applicant's StarK record has a Visa Required value of Y. See Chapter 25, "(GBR) Managing PBI Data Exchange," page 685.
Campus Used	Select if you have multiple institution campuses for UCAS or GTTR admissions. Clear if you have a single institution campus for UCAS or GTTR admissions.
Disable Decision Link	Select to disable the Decision Entry link on the UCAS Applicant Summary page (Student Admissions, UCAS Processing, UCAS Applications, UCAS Applicant Summary), the GTTR Applicant Summary page (Student Admissions, UCAS Processing, GTTR Applications, GTTR Applicant Summary), the UCAS Application Notes page (Student Admissions, UCAS Processing, UCAS Application Notes), and the GTTR Application Notes page (Student Admissions, UCAS Processing, GTTR Application Notes).

HRMS Decision Approver Select if you want the Approver and Decision Maker lookups to display person IDs from PeopleSoft HRMS records (EMPLOYEE_NAME_VW).
If you do not select this check box, the Approver and Decision Maker lookups display person IDs from only the People records (PEOPLE_SRCH).

Contextual Data Select if you want to import data from the Contextual Data views (cvRefSchoolContextualData and ivContextual).

Address Usage

The system uses these values when it imports applicant address data from ivStarA and ivgStarA views.

Correspondence Address Type Select the address type that you want the import process to assign to the imported correspondence addresses.

Home Address Type Select the address type that you want the import process to assign to the imported home addresses.
The home and correspondence address values must be different.

Telephone Type Select the phone type that you want the import process to assign to the imported telephone numbers.

Mobile Phone Type Select the phone type that you want the import process to assign to the imported mobile phone numbers.

Email Type Select the email type that you want the import process to assign to the imported email addresses.

For information about defining address types, see *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Personal Information Foundation Tables."

Confirmation Enquiry

After exam results are published, applicants may want to confirm with an institution whether or not they have been accepted. Also, during this Confirmation processing period, an institution will also handle enquiries from rejected applicants who may want to be considered through Clearing. Use the Confirmation Enquiry group box to configure how to handle such applicant enquiries related to Confirmation and Clearing.

Automatic Save Select to have the system automatically save the record once you have entered the mandatory values on the UCAS Confirmation Enquiries page.
If you do not select this check box, you will need to click the Save button on the UCAS Confirmation Enquiries page, after entering the mandatory values.

Outcome Required

Select to make the Action Required and Outcome Codes fields mandatory to save a Notes record on the UCAS Confirmation Enquiries page. If you do not select this check box, the Action Required and Outcome Codes fields become optional fields.

Setting Up UCAS Application Import Defaults

Access the UCAS Application Import page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Application Import).

UCAS Configuration

UCAS Application Import

GTTR Application Import

Academic Institution:

PSUNV

PeopleSoft University

Initial Action Reason:

'Admit Type:

FYR

First-Year

'Academic Level:

First Year

'Application Center:

UGRD

Undergraduate

'Application Fee Type:

Standard

'Application Method:

Web Application

'Campus:

MAIN

Main Hacienda Campus

UCAS Course Code:

Earliest Application Year:

Previous Name Type:

Former1

UCAS Application Import page

When you import ivStarC application data for the first time, the system creates Campus Solutions application records for the imported data. You can use the Maintain Applications component to access the Campus Solutions application records. The import process uses the values you set up on the UCAS Application Import page to create the Campus Solutions application records for the imported ivStarC application data.

Initial Action Reason

Enter the default action reason that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data.

Define the initial action reasons in the Program Action Table page. Only action reasons mapped with the program action of *APPL* appear on the UCAS Application Import page. For information about setting up action reasons, see *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Setting Up Admissions Program Actions and Program Action Reasons."

Admit Type	Enter the admit type that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Define the admit types in the Admit Type Table page. If you have defined an admit type for a career, ensure that the Admit Type in the UCAS Application Import page matches the career that is associated with the ivStarC application data.
Academic Level	Select the default academic level that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values. The import process assigns this default value only if you do not map the academic levels to entry points on the Entry Point Mapping page.
Application Center	Select the default application center that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. The import process uses this default value only if you do not map application centers to UCAS courses and Campus Solutions careers, programs, and plans on the UCAS Course page. Define the application processing centers in the Application Center Table page. If you have defined an application center for a career, ensure that the application center selected on the UCAS Application Import page matches the career with which the ivStarC application data is associated. See <i>PeopleSoft Recruiting and Admissions 9.0 PeopleBook</i>, Building Your Recruiting Structure See <i>PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook</i>, Securing Recruiting and Admissions
Application Fee Type	Select the application fee type that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values.
Application Method	Select the application method that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values.
Campus	Enter the default campus that you want the import process to assign to the Campus Solutions application records related to the imported ivStarC application data. Values for this field are delivered with your system as translate values. The import process assigns the default value only if you do not map a campus to UCAS courses and Campus Solutions careers, programs, and plans on the UCAS Course page.
UCAS Course Code	Enter the default course code that you want the import process to assign to the imported ivStarC application data. The import process assigns the default value only to imported applications that do not have a course code.

Earliest Application Year

Enter the application year for which you want the process to import applications. If you leave the field blank, the import process may import applications from ivStarC for both previous and current admission cycles depending on timestamp values.

Suppose, your institution is implementing Campus Solutions UCAS for the 2010 cycle (the UCAS cycle is 2010 on the UCAS Configuration page). The institution wants to prevent the import of 2009 applications. In this case, enter *2010* in the Earliest Application Year field.

Previous Name Type

Select the name type that the import process should use to create the Previous Name records in Campus Solutions. The import process creates the previous Name records from the Forenames and Previous Surname values that it imports from the StarN views.

The available values for this field does not include *Primary* or *Preferred* because the import process uses these two types when it creates applicant's current Name records in Campus Solutions.

To define name types, select Set Up HRMS, Foundation Tables, Personal, Name Type.

After running the import process, both the previous names and primary/preferred names can be viewed on the Names page (Campus Community, Personal Information, Biographical, Names).

Note. The import process assigns the academic load of *Full time* and the notification plan of *Regular* to the Campus Solutions application records related to the imported ivStarC application data. The values *Full time*, *Part time*, and *Regular* are delivered with your system as translate values.

Setting Up GTTR Application Import Defaults

Access the GTTR Application Import page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Application Import).

UCAS Configuration		UCAS Application Import		GTTR Application Import	
Academic Institution:	PSUNV	PeopleSoft University			
Initial Action Reason:	AGNY	Agency Provided Application			
Admit Type:	FYR	First-Year			
Academic Level:	First Year				
Application Center:	GRAD	Graduate Admissions			
Application Fee Type:	Standard				
Application Method:	Web Application				
Campus:	MAIN	Main Hacienda Campus			
GTTR Course Code:					
Earliest Application Year:					
Previous Name Type:	Former1				

GTTR Application Import page

When you import ivgStarG application data for the first time, the system creates Campus Solutions application records for the imported data. You can use the Maintain Applications component to access the Campus Solutions application records. The import process uses the values you set up on the GTTR Application Import page to create the Campus Solutions application records for the imported ivgStarG application data.

Initial Action Reason

Enter the default action reason that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. If you do not enter an initial action reason, the system creates Campus Solutions application records with an *APPL* program action and no action reason for the imported ivgStarG application data.

Define the initial action reasons in the Program Action Table page. Only action reasons mapped with the program action of *APPL* appear on the GTTR Application Import page.

Admit Type

Enter the admit type that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data.

Define the admit types on the Admit Type Table page. If you have defined an admit type for a career, ensure that the default Admit Type on the GTTR Application Import page matches the career with which the ivgStarG application data is associated.

Academic Level

Select the academic level that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. Values for this field are delivered with your system as translate values.

Application Center	Select the default application center that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. The import process uses this default value only if you do not map application centers to GTTR courses and Campus Solutions careers, programs, and plans on the GTTR Course page. Define the application processing centers in the Application Center Table page. If you have defined an application center for a career, ensure that the application center selected in the GTTR Application Import page matches the career with which the ivgStarG application data is associated.
Application Fee Type	Select the application fee type that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. Values for this field are delivered with your system as translate values.
Application Method	Select the application method that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. Values for this field are delivered with your system as translate values.
Campus	Enter the default campus that you want the import process to assign to the Campus Solutions application records related to the imported ivgStarG application data. Values for this field are delivered with your system as translate values. The import process assigns the default value only if you do not map a campus to GTTR courses and Campus Solutions careers, programs, and plans on the GTTR Course page.
GTTR Course Code	Enter the default course code that you want the import process to assign to the imported ivgStarG application data. The import process assigns the default value only to imported applications that do not have a course code.
Earliest Application Year	Enter the application year for which you want the process to import applications. If you leave the field blank, the import process may import applications from ivgStarG for both previous and current admission cycles depending on timestamp values. Suppose, your institution is implementing Campus Solutions GTTR for the 2010 cycle (the UCAS cycle is 2010 on the UCAS Configuration page). The institution wants to prevent the import of 2009 applications. In this case, enter <i>2010</i> in the Earliest Application Year field.

Previous Name Type

Select the name type that the import process should use to create the Previous Name records in Campus Solutions. The import process creates the previous Name records from the Forenames and Previous Surname values that it imports from the StarN views.

The available values for this field does not include *Primary* or *Preferred* because the import process uses these two types when it creates applicant's current Name records in Campus Solutions.

To define name types, select Set Up HRMS, Foundation Tables, Personal, Name Type.

After running the import process, both the previous names and primary/preferred names can be viewed on the Names page (Campus Community, Personal Information, Biographical, Names).

Note. The import process assigns the notification plan of *Regular* to the Campus Solutions application records related to the imported ivgStarG application data. Additionally, the import process assigns the academic load of *Full time* or *Part Time* based on the value of the PartTime field in the imported ivgStarG record. The values *Full time*, *Part time*, and *Regular* are delivered with your system as translate values.

Setting Up UCAS Decision Approval Options

Access the UCAS Decision Approval page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Decision Approval).

The screenshot shows a web application interface with three tabs at the top: "GTTR Application Import", "UCAS Decision Approval" (which is selected), and "GTTR Decision Approval". Below the tabs, the "Academic Institution:" is set to "PSUNV PeopleSoft University". A section titled "UCAS Approval Required" contains a list of checkboxes, all of which are checked:

- ☒ Interview
- ☐ Unconditional Offer
- ☒ Conditional Offer
- ☒ Rejection
- ☒ Withdrawal
- ☒ Confirmation Acceptance
- ☒ Confirmation Rejection
- ☒ Release to Clearing

UCAS Decision Approval page

Select the Interview, Unconditional Offer, Conditional Offer, Rejection, and Withdrawal check boxes to indicate that a user must use one of the UCAS Decision Approval processing pages to review and approve the decisions before the institution communicates the decisions to UCAS.

See "Approving or Rejecting a UCAS Decision" and "Approving or Rejecting Multiple UCAS Decisions" sections in this chapter.

Select the Confirmation Acceptance and Confirmation Rejection check boxes to indicate that a user must use the UCAS Confirmation Approval page or the Quick Confirmation Approval page to review and approve the UCAS Confirmation decision before the institution communicates the decisions to UCAS.

See "Approving or Rejecting a Confirmation Decision" and "Approving or Rejecting Multiple Confirmation Decisions" sections in this chapter.

Select the Release to Clearing check box to indicate that a user must use the UCAS Release Approval page to review and approve the release before the institution communicates the decisions to UCAS.

See "Approving or Rejecting the Release into Clearing Decision" section in this chapter.

Setting Up GTTR Decision Approval Options

Access the GTTR Decision Approval page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Decision Approval).



GTTR Application Import UCAS Decision Approval **GTTR Decision Approval**

Academic Institution: PSUNV PeopleSoft University

GTTR Approval Required

- ☒ Interview
- ☐ Unconditional Offer
- ☒ Conditional Offer
- ☒ Rejection
- ☒ Withdrawal
- ☒ Confirmation Acceptance
- ☒ Confirmation Rejection

GTTR Decision Approval page

Select the Interview, Unconditional Offer, Conditional Offer, Rejection, and Withdrawal check boxes to indicate that a user must use the GTTR Decision Approval processing page to review and approve the decisions before the institution communicates the decisions to GTTR. To navigate to the GTTR Decision Approval processing page, select Student Admissions, UCAS Processing, GTTR Decision Approval, Decision Approval.

See "Approving or Rejecting a GTTR Decision" section in this chapter.

The Confirmation Acceptance and Confirmation Rejection check boxes do not have any impact on the system.

Setting Up UCAS Program Action Reasons

Access the UCAS Program Actions page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Program Actions).

[New Window](#) | [Customize Page](#)

[GTTR Decision Approval](#) | **[UCAS Program Actions](#)** | [GTTR Program Actions](#) | [UCAS Confirmation](#) | [GTTR Confirmation](#)

Academic Institution: PSGBR PeopleSoft University UK

Institution Decisions

	Program Action	Action Reason
*Conditional Offer:	COND Conditional Admit	COND Conditional Offer
*Amended Conditional Offer:	COND Conditional Admit	ACND Amended Conditional Offer
*Unconditional Offer:	ADMT Admit	UNCD Unconditional Offer
*Amended Unconditional Offer:	ADMT Admit	AUNC Amended Unconditional Offer
*Rejection:	DENY Deny	REJN Rejection
*Amended Rejection:	DENY Deny	AREJ Amended Rejection
*Interview:	APPL Application	INTV Interview
*Amended Interview:	APPL Application	AINT Amended Interview
*Course Full:	DENY Deny	
*Amended Course Full:	DATA Data Change	
*Withdrawal:	WAPP Applicant Withdrawal	WDRW Withdrawal
*Amended Withdrawal:	WAPP Applicant Withdrawal	AWDW Amended Withdrawal
*UF Withdrawal - Institution:	WADM Administrative Withdrawal	UFWI UF Withdrawal - Institution
*UF Amendment:	ADMT Admit	UFAM UF Amendment
*Course Correction:	PRGC Program Change	CRCR Course Correction

UCAS Program Actions page (1 of 2)

Applicant Replies			
	Program Action		Action Reason
*Conditional Firm:	COND	Conditional Admit	CNDF Conditional Firm
*Conditional Insurance:	COND	Conditional Admit	CNDI Conditional Insurance
*Unconditional Firm:	ADMT	Admit	UNCF Unconditional Firm
*Unconditional Insurance:	ADMT	Admit	UNCI Unconditional Insurance
*Conditional Decline:	WAPP	Applicant Withdrawal	CNDD Conditional Decline
*Unconditional Decline:	WAPP	Applicant Withdrawal	UNDC Unconditional Decline

UCAS Amendments			
	Program Action		Action Reason
*Changed Course:	PRGC	Program Change	CHCR Changed Course
*Changed Campus:	PRGC	Program Change	CHCM Changed Campus
*Changed Entry Point:	PRGC	Program Change	CHEP Changed Entry Point
*Changed Term:	PRGC	Program Change	CHTR Changed Term
*Cancelled Choice:	WAPP	Applicant Withdrawal	CACH Cancelled Choice
*Withdrawal - UCAS:	WAPP	Applicant Withdrawal	WDUC Withdrawal - UCAS
*UF Withdrawal - UCAS:	WAPP	Applicant Withdrawal	UFWU UF Withdrawal - UCAS
*Withdrawal Re-instated:	APPL	Application	WDRE Withdrawal Reinstated
*Reject by Default:	DENY	Deny	RBDE Reject by Default
*Decline by Default:	WAPP	Applicant Withdrawal	DBDE Decline by Default

UCAS Program Actions page (2 of 2)

Institution Decisions

When you generate decision transactions to send to UCAS, the system uses the Institution Decisions group box values to update the Campus Solution application records (related to the imported application data). The following table describes when the system uses the program action and reason values for the institution decisions:

Program Action and Action Reason Values For	Used by the System When
Conditional Offer	You make a conditional offer.
Amended Conditional Offer	You amend a decision to conditional offer. This decision is applicable to an LA transaction.
Unconditional Offer	You make an unconditional offer.
Amended Unconditional Offer	You amend a decision to unconditional offer. This decision is applicable to an LA transaction.

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Rejection	You reject an application.
Amended Rejection	You amend a decision to rejection. This decision is applicable to an LA transaction.
Interview	You enter a decision of interview.
Amended Interview	You amend a decision to interview. This decision is applicable to an LA transaction.
Course Full	You enter a decision of course full.
Amended Course Full	You amend a decision to course full. This decision is applicable to an LA transaction.
Withdrawal	Your institution withdraws an application.
Amended Withdrawal	You amend a decision to be withdrawn by the institution. This decision is applicable to an LA transaction.
UF Withdrawal - Institution	Applicant declines the offer. This decision is applicable to an RW transaction.
UF Amendment	You amend a course, entry date, or entry point of an applicant who has firmly accepted an unconditional offer or who has accepted a Clearing place. This decision is applicable to an RA transaction.
Course Correction	You correct a course. The system uses this decision to create an LC (Course Correction) transaction to send to UCAS.

Applicant Replies

The system uses the Applicant Replies group box values when the Reply values you imported change. The following table describes when the system uses the program action and reason values for the applicant reply decisions:

<i>Program Action and Action Reason Values For</i>	<i>Used by the System When</i>
Conditional Firm	The applicant accepts a conditional offer firmly.
Conditional Insurance	The applicant accepts a conditional offer as insurance.
Unconditional Firm	The applicant accepts an unconditional offer firmly.
Unconditional Insurance	The applicant accepts an unconditional offer as insurance.
Conditional Decline	The applicant declines a conditional offer.

Program Action and Action Reason Values For	Used by the System When
Unconditional Decline	The applicant declines an unconditional offer. The applicant declines an unconditional offer made by your institution for an Adjustment choice (Choice Number = 6, Decision = U, Reply = D and Adjustment is not D).

UCAS Amendments

The system uses the UCAS Amendments group box values when UCAS initiates changes and you import these changes from ivStarC and ivStarK. The following table describes when the system uses the program action and reason values for the UCAS amendments:

Program Action and Action Reason Values For	Used by the System When
Changed Course	UCAS changes a course.
Changed Campus	UCAS changes a campus.
Changed Entry Point	UCAS changes an entry point.
Changed Term	UCAS changes entry year, entry month, or both, which results in a change of admit term for the applicant.
Cancelled Choice	UCAS cancels an application choice (in ivStarC, the value of the ChoiceCancelled field is Y).
Withdrawal - UCAS	UCAS either notifies that the applicant has withdrawn all application choices (in ivStarK, the value of the Withdrawn field is C) or applicant has withdrawn only one choice (in ivStarC, the value of Decision is W).
UF Withdrawal - UCAS	Applicants with an unconditional firm offer for an application choice notify UCAS that they want to withdraw their applications (in ivStarK, the value of the Withdrawn field is U).
Withdrawal Re-instated	UCAS notifies that a previously withdrawn application choice can be considered by the institution. The system uses the Withdrawal Re-instated field values when UCAS changes the ivStarC decision value to blank from W. Note that the system does not process the R values for the ivStarK Withdrawn fields. This change is not specific to an application choice; as a consequence, the system does not process this change when you import data. To process this type of change, you must change the decision value to blank from W for an application choice.
Reject by Default	UCAS rejects the application because your institution did not communicate any decision to UCAS (in ivStarC, the Action field is R).

Program Action and Action Reason Values For	Used by the System When
Decline by Default	UCAS declines an offer because the applicant did not reply (in ivStarC, the Action field is <i>D</i>). Note that in ivStarC, if the Action field is <i>U</i> (updated from insurance to firm, CI to CF, or UI to UF), then the system picks up the change in the ivStarC Reply value.

The following scenario shows how Campus Solutions uses the values set up on the UCAS Program Actions page:

1. On the UCAS Program Actions page, for the Rejection decision enter a program action of *DENY* and an action reason of *R*.
2. Enter a decision of *Rejection* for a UCAS application on the Initial Decision Entry page. If approval is required, use the UCAS Decision Approval page to approve the Rejection decision.
3. Select the Generate Transaction check box on the Transaction Processing page and run the Transaction Processing Application Engine (SAD_UC_TRAN) process to generate a transaction for the Rejection decision.
4. The system sets the program action to *DENY* and the action reason to *R* in the Campus Solutions application record of the corresponding UCAS application number.

Setting Up GTTR Program Action Reasons

Access the GTTR Program Actions page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Program Actions).

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[GTR Decision Approval](#) | [UCAS Program Actions](#) | **GTR Program Actions** | [UCAS Confirmation](#) | [GTR Confirmation](#)

Academic Institution: PSGBR PeopleSoft University UK

Institution Decisions

	Program Action	Action Reason
*Conditional Offer:	COND Conditional Admit	COND Conditional Offer
*Amended Conditional Offer:	COND Conditional Admit	ACND Amended Conditional Offer
*Unconditional Offer:	ADMT Admit	UNCD Unconditional Offer
*Amended Unconditional Offer:	ADMT Admit	AUNC Amended Unconditional Offer
*Rejection:	DENY Deny	REJN Rejection
*Amended Rejection:	DENY Deny	AREJ Amended Rejection
*Rejection - English:	DENY Deny	REJE Rejection - English
*Amended Rejection - English:	DENY Deny	ARJE Amended Rejection - English
*Rejection - Maths:	DENY Deny	REJM Rejected - Maths
*Amended Rejection - Maths:	DENY Deny	ARJM Amended Rejection - Maths
*Rejection - Science:	DENY Deny	REJS Rejection - Science
*Amended Rejection - Science:	DENY Deny	ARJS Amended Rejection - Science

GTTR Program Actions page (1 of 3)

*Course Closed:	DENY Deny	CRCL Course Closed
*Amended Course Closed:	DENY Deny	ACRC Amended Course Closed
*Interview:	APPL Application	INTV Interview
*Amended Interview:	APPL Application	AINT Amended Interview
*Withdrawal:	WAPP Applicant Withdrawal	WDRV Withdrawal
*Amended Withdrawal:	WAPP Applicant Withdrawal	AWDW Amended Withdrawal
*UF Withdrawal - Institution:	WADM Administrative Withdrawal	UFWI UF Withdrawal - Institution
*UF Amendment:	DATA Data Change	

Applicant Replies

	Program Action	Action Reason
*Conditional Firm:	COND Conditional Admit	CNDF Conditional Firm
*Unconditional Firm:	ADMT Admit	UNCF Unconditional Firm
*Conditional Decline:	WAPP Applicant Withdrawal	CNDD Conditional Decline
*Unconditional Decline:	WAPP Applicant Withdrawal	UNDC Unconditional Decline

GTTR Program Actions page (2 of 3)

GTTR Amendments			
	Program Action		Action Reason
*Changed Course:	PRGC	Program Change	CHCR Changed Course
*Changed Campus:	PRGC	Program Change	CHCM Changed Campus
*Changed Term:	PRGC	Program Change	CHTR Changed Term
*Withdrawal - GTTR:	WAPP	Applicant Withdrawal	WDGT Withdrawal - GTTR
*UF Withdrawal - GTTR:	WAPP	Applicant Withdrawal	UFWG UF Withdrawal - GTTR
*Withdrawal Re-instated:	APPL	Application	WDRE Withdrawal Reinstated
*Reject by Default:	DENY	Deny	RBDE Reject by Default
*Decline by Default:	WAPP	Applicant Withdrawal	DBDE Decline by Default

GTTR Program Actions page (3 of 3)

Institution Decisions

When you generate GTTR decision transactions, the system uses the Institution Decisions group box values to update the Campus Solution application records (related to the imported GTTR application data). The following table describes when the system uses the program action and the reason values for the institution decisions:

Program Action and Action Reason Values For	Used by the System When
Conditional Offer	You make a conditional offer.
Amended Conditional Offer	You amend a decision to conditional offer. This decision is applicable to an LA transaction.
Unconditional Offer	You make an unconditional offer.
Amended Unconditional Offer	You amend a decision to unconditional offer. This decision is applicable to an LA transaction.
Rejection	You reject an application.
Amended Rejection	You amend a decision to rejection. This decision is applicable to an LA transaction.
Rejection - English	You enter a decision of <i>Not qualified in English</i> .
Amended Rejection - English	You amend a decision to <i>Not qualified in English</i> . This decision is applicable to an LA transaction.
Rejection - Maths	You enter a decision of <i>Not qualified in Mathematics</i> .

Program Action and Action Reason Values For	Used by the System When
Amended Rejection - Maths	You amend a decision to <i>Not qualified in Mathematics</i> . This decision is applicable to an LA transaction.
Rejection - Science	You enter a decision of <i>Not qualified in Science</i> .
Amended Rejection - Science	You amend a decision to <i>Not qualified in Science</i> . This decision is applicable to an LA transaction.
Course Closed	You enter a decision of <i>Course Closed</i> .
Amended Course Closed	You amend a decision to <i>Course Closed</i> . This decision is applicable to an LA transaction.
Interview	You enter a decision of <i>Interview</i> and specify the interview date for the transaction.
Amended Interview	You amend a decision to <i>Interview</i> and specify the interview date for the transaction. This decision is applicable to an LA transaction.
Withdrawal	Your enter a decision of <i>Withdrawal</i> .
Amended Withdrawal	You amend a decision to <i>Withdrawal</i> . This decision is applicable to an LA transaction.
UF Amendment	You amend an unconditional firm application.

The UF Withdrawal - Institution field values are not required until RW processing functionality for GTTR is added in a future release.

Applicant Replies

The system uses the Applicant Replies group box values when the Reply values you imported change. The following table describes when the system uses the program action and the reason values for the applicant replies:

Program Action and Action Reason Values For	Used by the System When
Conditional Firm	The applicant accepts a conditional offer firmly.
Unconditional Firm	The applicant accepts a unconditional offer firmly.
Conditional Decline	The applicant declines a conditional offer.
Unconditional Decline	The applicant declines an unconditional offer.

GTTR Amendments

The system uses the GTTR Amendments group box values when GTTR initiates changes and you import these changes from ivgStarG and ivgStarK. The following table describes when the system uses the program action and the reason values for the GTTR amendments:

Program Action and Action Reason Values For	Used by the System When
Changed Course	GTTR changes a course.
Changed Campus	GTTR changes a campus.
Changed Term	GTTR changes entry year, entry month, or both, resulting in a change of admit term for the applicant.
Withdrawal - GTTR	GTTR notifies that the applicant has withdrawn all application choices (in ivgStarK, Withdrawn field is C or in ivgStarG, Decision field is W).
UF Withdrawal - GTTR	Applicants with an unconditional firm offer for an application choice notify UCAS that they want to withdraw their applications (in ivgStarK, Withdrawn field is U).
Withdrawal Re-instated	GTTR notifies that a previously withdrawn application choice can be considered by the institution. The system uses the Withdrawal Re-instated field values when GTTR changes the ivgStarG decision value to blank from W. Note that the system does not process the R values for the ivgStarK Withdrawn fields. This change is not specific to an application choice and, as a consequence, the system does not process this change when you import data. To process this type of change, you must change the decision value to blank from W for an application choice.
Reject by Default	GTTR rejects the application because your institution did not communicate any decision to UCAS (in ivgStarG, Action field is R).
Decline by Default	GTTR declines an offer because the applicant did not reply (in ivgStarG, Action field is D).

Setting Up UCAS Program Action Reasons for Confirmation, Clearing, and Adjustment

Access the UCAS Confirmation page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, UCAS Confirmation).

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[GTR Decision Approval](#)
[UCAS Program Actions](#)
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[GTR Confirmation](#)

Academic Institution: PSGBR PeopleSoft University UK

UCAS Confirmation Decisions

	Program Action	Action Reason
*Accept Firm:	ADMT Admit	ACCF Accept Firm
*Accept Insurance:	ADMT Admit	ACCI Accept Insurance
*Reject Firm:	DENY Deny	REJF Reject Firm
*Reject Insurance:	DENY Deny	REJI Reject Insurance
*Amended Confirmation:	ADMT Admit	ACNF Amended Confirmation
*Confirmation with Change:	ADMT Admit	CNFC Confirmation with Change
*Delayed Conditional:	COND Conditional Admit	DCON Delayed Confirmation Decision

UCAS Confirmation Amendments

	Program Action	Action Reason
*UF Elsewhere:	WAPP Applicant Withdrawal	UFEL UF Elsewhere
*Clearing Elsewhere:	WAPP Applicant Withdrawal	CLEL Clearing Elsewhere
*Adjustment Decline:	WAPP Applicant Withdrawal	
*UI to UF at Confirmation:	ADMT Admit	UIUF UI to UF at Confirmation
*CI to CF at Confirmation:	COND Conditional Admit	CICF CI to CF at Confirmation

UCAS Confirmation page (1 of 2)

UCAS Enquiry

	Program Action	Action Reason
*Adjustment Acceptance:	ADMT Admit	
*Clearing Application:	APPL Application	CLAP Clearing Application
*Clearing Acceptance:	ADMT Admit	CLAC Clearing Acceptance
*Clearing Rejection:	DENY Deny	CLRJ Clearing Rejection
*Release to Clearing:	WADM Administrative Withdrawal	RLCL Release to Clearing
*RPA Applicant:	ADMT Admit	RPAA RPA Applicant

UCAS Confirmation page (2 of 2)

UCAS Confirmation Decisions

When the system generates UCAS confirmation transactions (RD transactions), it uses the UCAS Confirmation Decisions group box values to update the Campus Solutions application records (related to the imported UCAS application data). The following table describes when the system uses the program action and reason values for the UCAS Confirmation decisions:

Program Action and Action Reason Values For	Used by the System When
Accept Firm	The institution confirms acceptance for a conditional firm application. That is, Decision is <i>A</i> (Accept) and Reply is <i>F</i> (Firm). Also, the system uses this value in ivStarC update processing when the Reply changes to <i>F</i> , the Decision is <i>U</i> , and the application was previously <i>CF</i> .
Accept Insurance	The institution confirms acceptance for a conditional insurance application. That is, Decision is <i>A</i> and Reply is <i>I</i> (Insurance).
Reject Firm	The institution confirms rejection for a conditional firm application. That is, Decision is <i>R</i> (Reject) and Reply is <i>F</i> .
Reject Insurance	The institution confirms rejection of a conditional insurance application. That is, Decision is <i>R</i> and Reply is <i>I</i> .
Amended Confirmation	You change a Confirmation decision and a new RD transaction is generated.
Confirmation with Change	You change Course or Year as part of a Confirmation decision. That is, Decision is <i>C</i> (Conditional Offer) in an RD transaction.
Delayed Conditional	You delay the conditional offer. That is, Decision is <i>D</i> (Delayed Confirmation Decision) in an RD transaction.

For an applicant, you can enter the institution decision and view the applicant reply on the Initial Decision Entry page and the Decision Processing page.

See "Entering an Initial Admission Decision for a UCAS Application Choice", "Entering or Updating an Admission Decision for a UCAS Application Choice", and "Entering a Decision for Multiple UCAS Application Choices" sections in this chapter.

UCAS Confirmation Amendments

When you receive Confirmation amendments from UCAS, the system uses the UCAS Confirmation Amendments group box values to update the Campus Solution application records (related to the imported UCAS application data). The following table describes when the system uses the program action and the reason values for the UCAS Confirmation amendments:

Program Action and Action Reason Values For	Used by the System When
UF Elsewhere	The applicant is UF (unconditional firm) at another institution and the local choice is UI (unconditional insurance) or CI (conditional insurance).
Clearing Elsewhere	Another institution has accepted the applicant through Clearing.
Adjustment Decline	Another institution has accepted the applicant through Adjustment.
UI to UF at Confirmation	An unconditional insurance offer becomes firm as a result of the applicant's conditional firm choice being rejected at Confirmation. That is, Decision is <i>U</i> , Reply is <i>F</i> , and the previous Reply value was <i>I</i> .
CI to CF at Confirmation	The applicant's CF choice is rejected during Confirmation and UCAS updates the applicant's existing CI choice to CF. That is, Decision is <i>C</i> , Reply is <i>F</i> , and the previous Reply value was <i>I</i> .

UCAS Enquiry

During the Clearing and Adjustment processes, the system uses the UCAS Enquiry group box values to create or update the Campus Solutions application records. The following table describes when the system uses the program action and the reason values for the UCAS Clearing and Adjustment decisions:

Program Action and Action Reason Values For	Used by the System When
Adjustment Acceptance	You import Adjustment applications (for which the institution has sent AD transactions) and the system updates the corresponding Campus Solutions application record.
Clearing Application	You import Clearing applications and the system creates the corresponding Campus Solutions application records for the imported Clearing applications.
Clearing Acceptance	You create a RX transaction (with Decision = A) and the system updates the corresponding Campus Solutions application record. You import an accepted Clearing application and the system creates a new Campus Solution application record for the accepted Clearing application (new application). You import an accepted Clearing decision (Result = A) and the system updates the Campus Solution application record with the result (existing application).
Clearing Rejection	You create a RX transaction (with Decision = R) and the system updates the corresponding Campus Solutions application record. You import a rejected Clearing decision (Result = R) and the system updates the Campus Solution application record with the result (existing application).

Program Action and Action Reason Values For	Used by the System When
Release to Clearing	You create a RR transaction to notify UCAS that the applicant is released into Clearing and the system updates the corresponding Campus Solutions application record.
RPA Applicant (record of prior acceptance applicant)	EAS in ivStarK is R, and the system updates the corresponding Campus Solutions application record.

Scenarios

The following scenarios show how Campus Solutions uses the values set up on the Confirmation page:

Scenario 1: Importing new Clearing applications (that is, application choice number 9 does not exist in the database)

1. For Clearing Application, enter the program action *APPL* (Application) and action reason *CAP*. For Clearing Acceptance, enter the program action *ADMT* and action reason *CAC*. For Clearing rejection, enter the program action *DENY* and action reason *CR*.
2. The Import Applicant Data Application Engine (SAD_UC_IMPAP) process imports UCAS Clearing application records from ivStarZ1. The imported UCAS Clearing application records have a choice number of 9.
3. If the Result value in ivStarZ1 is *null* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *APPL* and action reason of *CAP*.
4. If the Result value in ivStarZ1 is *A* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *ADMT* and action reason of *CAC*.
5. If the Result value in ivStarZ1 is *R* for the Clearing application, the system creates a corresponding Campus Solutions application record with a program action of *DENY* and action reason of *CR*.
6. For the new Clearing Campus Solutions application record that has a program action of *APPL*, you enter a decision *A*. After entering the decision you generate the RX transaction. In this case, the system updates the Campus Solutions application record with the program action of *ADMT* and action reason *CAC*.

Scenario 2: Confirming offers

1. For the Accept Firm decision enter a program action of *ADMT* and action reason of *COF*.
2. Click Accept on the UCAS Confirmation page for a UCAS application that has a conditional offer. If required, approve the acceptance of the admission offer.
3. Select the Generate Transaction check box on the Transaction Processing page and run the Transaction Processing process to generate a transaction for the Confirmation decision.
4. The system assigns the program action *ADMT* and action reason *COF* to the Campus Solutions application record for the corresponding UCAS application.

Scenario 3: Importing Adjustment Applications

1. For the Adjustment Acceptance decision, enter a program action of *ADMT* and action reason of *ADA*.

2. The Import Applicant Data process imports UCAS adjustment (choice number 6) records from ivStarC. For applications, which the institution has already sent AD transactions to UCAS, the incoming decision value is *U* and reply value is *F*.
3. If the incoming decision value is not *U*, the system creates a corresponding Campus Solutions application record with a program action of *APPL* and the action reason that you had set up on the UCAS Application Import page.
4. If the incoming decision value is *U* and reply is *F*, the system updates the corresponding Campus Solutions application record with a program action of *ADMT* and action reason of *ADA*.
5. If the incoming decision value is *U*, reply is *D*, and Adjustment is not *D*, the system updates the corresponding Campus Solutions application record with the program action and action reason values that you had set up for Unconditional Decline on the UCAS Program Actions page.
6. For the new Adjustment Campus Solutions application record that has a program action of *APPL*, the institution generates an AD transaction. In this case, the system updates the Campus Solutions application record with the program action of *ADMT* and action reason of *ADA*.

Scenario 4: An applicant has been accepted by another institution through Adjustment. Your institution previously sent an unconditional offer or a confirmation acceptance to UCAS that the applicant has firmly accepted (the applicant has an application choice with a decision reply value of *UF*).

1. For the Adjustment Decline decision, enter a program action of *DENY* and action reason of *ADD*.
2. The Import Applicant Data process imports UCAS choice records from ivStarC.
3. If the incoming Adjustment value is *D* for an application choice that exists in your database, the process updates the decision-reply value from *UF* to *UD*. Also, the system updates the corresponding Campus Solutions application record with a program action of *DENY* and action reason of *ADD*.

Setting Up GTTR Program Action Reasons for Confirmation and Clearing Elsewhere

Access the GTTR Confirmation page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, UCAS Configuration, GTTR Confirmation).

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GTTR Decision Approval
UCAS Program Actions
GTTR Program Actions
UCAS Confirmation
GTTR Confirmation

Academic Institution: PSGBR PeopleSoft University UK

GTTR Confirmation Decisions

	Program Action	Action Reason
*Accept Firm:	ADMT Admit	ACCF Accept Firm
*Reject Firm:	DENY Deny	REJF Reject Firm
*Amended Confirmation:	ADMT Admit	ACNF Amended Confirmation
*Confirmation with Change:	ADMT Admit	CNFC Confirmation with Change
*Delayed Conditional:	COND Conditional Admit	DCON Delayed Confirmation Decision

GTTR Confirmation Amendments

	Program Action	Action Reason
*Clearing Elsewhere:	WAPP Applicant Withdrawal	CLEL Clearing Elsewhere

GTTR Enquiry

	Program Action	Action Reason
*Clearing Application:	APPL Application	CLAP Clearing Application
*Clearing Acceptance:	ADMT Admit	CLAC Clearing Acceptance
*Clearing Offer:	COND Conditional Admit	
*RPA Applicant:	APPL Application	

GTTR Confirmation page

GTTR Confirmation Decisions

When the system generates GTTR Confirmation transactions, it uses the GTTR Confirmation Decisions group box values to update the Campus Solution application records (related to the imported GTTR application data). The following table describes when the system uses the program action and the reason values for the GTTR Confirmation decisions:

Program Action and Action Reason Values For	Used by the System When
Accept Firm	The institution confirms acceptance for a conditional firm application (Decision is A and Reply is F). Also, the system uses this action in ivgStarG update processing when you change the Reply to F, the Decision is U, and previously the application was CF.
Reject Firm	The institution confirms rejection for a conditional firm application (Decision is R, and Reply is F).

Program Action and Action Reason Values For	Used by the System When
Amended Confirmation	You change a Confirmation decision and a new RD transaction is generated.
Confirmation with Change	You change Course, Campus, Modular, Part Time, Entry Year, or Entry Month as part of a Confirmation decision (Decision is C in an RD transaction).
Delayed Conditional	You delay the conditional offer. That is, Decision is D (Delayed Confirmation Decision) in an RD transaction.

GTTR Confirmation Amendments

When you receive GTTR Confirmation amendments, the system uses the GTTR Confirmation Amendments group box values to update the Campus Solution application records (related to the imported GTTR application data). The following table describes when the system uses the program action and the reason values for the GTTR Confirmation amendments:

Program Action and Action Reason Values For	Used by the System When
Clearing Elsewhere	An applicant was accepted through Clearing at another institution.

GTTR Enquiry

When the system generates GTTR Enquiry transactions, it uses the GTTR Enquiry group box values to create or update the Campus Solution application records (related to the imported GTTR application data). The following table describes when the system uses the program action and the reason values for the GTTR Enquiry decisions:

Program Action and Action Reason Values For	Used by the System When
Clearing Application	You import Clearing applications and the system creates the corresponding Campus Solutions application records for the imported Clearing applications.
Clearing Acceptance	You import an accepted Clearing application that has Decision = <i>U</i> (Unconditional Offer) or <i>A</i> and the system creates a new Campus Solution application record for the accepted Clearing application. You create a RX transaction (Decision is <i>U</i>) and the system updates the corresponding Campus Solutions application record.
Clearing Offer	You import an accepted Clearing application that has Decision = <i>C</i> (Conditional Offer) and the system creates a new Campus Solution application record for the accepted Clearing application. You create a RX transaction (Decision is <i>C</i>) and the system updates the corresponding Campus Solutions application record.

Program Action and Action Reason Values For	Used by the System When
RPA Applicant	EAS in ivStarK is R, and the system updates the corresponding Campus Solutions application record.

Setting Up Outcomes for Enquiries and Notes

Access the Outcome Codes page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Outcome Codes).

Outcome Codes

Academic Institution: PSUNV PeopleSoft University

Outcome Code: CALLB

*Long Description: Could not transfer call; applicant to call back

*Short Description: Applicant to call back

*Action Required: Applicant

☒ UCAS

☐ GTTR

☒ Confirmation

☒ Active

Outcome Codes page

Action Required

Select a value that allows you to filter the outcome codes on the UCAS Confirmation Enquiries page, and UCAS and GTTR Application Notes pages.

Values are *Applicant*, *Institution*, and *None*.

UCAS

Select to have the outcome code available for selection on the UCAS Application Notes and UCAS Confirmation Enquiries pages.

GTTR

Select to have the outcome code available for selection on the GTTR Application Notes page.

Confirmation

Select to have the outcome code available for selection on the UCAS Confirmation Enquiries page.

Mapping UCAS Attendance Types

Access the Attendance Type page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Attendance Type).

Attendance Type

Academic Institution:

PSUNV PeopleSoft University

UCAS Attendance Type:

Full Time

*Academic Load:

Full-Time

Attendance Type page

Map the UCAS attendance types to Campus Solutions academic load values.

Note. When you import UCAS application data, the system uses the mapped academic load to create the related Campus Solutions application records.

Mapping UCAS and GTTR Entry Years and Months

Access the Entry Year page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Entry Year).

Entry Year

Academic Institution:

PSUNV PeopleSoft University

UCAS System:

UCAS

Academic Career:

UGRD Undergraduate

Admit Term:

0630 2009 Fall

Entry Year and Month					Customize Find		First 1 of 1 Last	
	*Entry Year	Entry Month	Default for Term					
1	2009	9	☒	+	-			

Entry Year page

Entry Year Enter the UCAS entry year in the format YYYY.

Entry Month	Enter a number between 1 and 12 to indicate the UCAS entry month. For example, if the month is January, enter <i>1</i>. For non-modular GTTR applications, enter <i>0</i>. GTTR does not deliver an entry month value for non-modular GTTR applications. If any incoming application does not have an entry month, the import process uses the mapping with 0 as the default.
Default for Term	If you have mapped multiple combinations of entry year and month to a single admit term, select a default admit term for transactions that you send to UCAS.

Note. When you import the UCAS application data, the system uses the mapped admit term to create or update the related Campus Solutions application records.

Note. It is recommended that you define entry year mappings for a single career for each combination of institution and UCAS system.

Mapping UCAS Entry Points

Access the Entry Point page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Entry Point).

Entry Point

Academic Institution:

PSUNV

UCAS Entry Point:

1

*Academic Level:

1st Year

Entry Point page

Note. When you import UCAS application data, the system uses the mapped academic level to create the related Campus Solutions application records.

UCAS admission entry points range from 0 for foundation year and 1 through 5 for first through fifth year entry. Entry point is not used in GTTR admissions. Therefore, for GTTR you need not map entry points with academic levels and careers. The system uses the default academic level that you defined on the GTTR Application Import page for GTTR applications.

Mapping UCAS Housing Interest

Access the Home page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Home).

Home

Academic Institution:

PSUNV

PeopleSoft University

Home:

H

Live at home

Mapping

'Housing Interest:

Commuter

☒

Active

Home page

Values for the Housing Interest field are delivered with your system as translate values. Values are *Commuter*, *Off Campus Housing*, and *On Campus Housing*.

Note. When you import UCAS application data, the system populates the mapped Campus Solutions Housing Interest into the related Campus Solutions application records.

Defining External Systems

Access the External System page (Setup SACR, Product Related, Campus Community, Define Campus Community, Set Up, Define External Systems).

External System

External System:

ULN

External System

Find | View All

First

1 of 1

Last

'Effective Date:

01/01/1900

'Status:

Active

'Description:

Unique Learner Number (ULN)

Short Description:

ULN

Person / Organization

☐ Organizations

☒ Persons

External System page

Define the following external systems codes listed in the following table.

External System Code	Description
GT	GTTR Personal ID (GTTRPERID)
ISA	Ind Safeguarding Auth (ISA)
NIN	National Insurance No (NIN)
SCN	Scottish Candidate Number (SCN)
UC	UCAS Personal ID (UCASPERID)
ULN	Unique Learner No (ULN)

You must define the codes as shown in the table but you can modify the description.

The system uses this setup to track applicant IDs imported from UCAS. To view the imported IDs for an applicant, use the External System page (Campus Community, Personal Information, Identification, External System ID).

Setting Up UCAS and GTTR User Defaults

Access the UCAS, GTTR Defaults page (Set Up SACR, User Defaults, UCAS, GTTR Defaults).

Enrollment Override Defaults		Communication Speed Keys		User 3C Groups Summary		UCAS, GTTR Defaults	
User ID:	PS	Name:	Locherty,Betty				
Institution Defaults Find View All First 1 of 1 Last							
Academic Institution:	PSUNV	PeopleSoft University					
UCAS Decision Entry							
UCAS Course:	G522	Business Information Systems					
UCAS Campus:	*						
UCAS Entry Year:							
Decision Maker:	0024	Francesca Fierros					
Approver:	0025	Trisha Tang					
Decision:							
Offer:							
GTTR Decision Entry							
GTTR Course:	GT17	Graduate Science Teaching					
GTTR Campus:	*						
GTTR Entry Year:							
Decision Maker:	0034	Alex Edmond					
Approver:	0035	Robert Matthews					
Decision:							
Offer:							

UCAS, GTTR Defaults page

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

Although setting user defaults can save time and minimize data entry errors, doing so is optional.

To set up user defaults for the Academic Institution, Term, Career, and Academic Program fields, select Set Up SACR, User Defaults, User Defaults 1. To set up user defaults for the Application Center field, select Set Up SACR, User Defaults, User Defaults 2.

If your institution does not have HRMS installed, the Decision Maker and Approver lookups do not have access to the database table that differentiates staff members from the other person records (such as students). Therefore, if HRMS is not installed, the lookups will display all person records. The same logic applies to other pages where Decision Maker or Approver lookups exist (for instance, the UCAS Decision Processing page).

Setting Up National ID Types for Country Code GBR

Access the National ID Type Table page (Set Up HRMS, Foundation Tables, Personal, National ID Type).

National ID Type Table

Country: GBR United Kingdom

National ID Types						Customize Find View All  First 1-6 of 6 Last	
NID Type	Default	Description	Short Desc	National ID Format	NID as stored		
GTTRID	☐	GTTR Personal ID	GTTRPERI	9999999999	9999999999	+	-
PR	☐	National Insurance Number	NINO	AA999999	AA999999	+	-
PR_9	☒	Nat Ins Num (9 Chars)	NINO	AA999999A	AA999999A	+	-
TEMP	☐	Temp National Insurance Numl	NINO	AA999999	AA999999	+	-
TEMP_9	☐	Temp NI Number (9 Chars)	NINO	AA999999A	AA999999A	+	-
UCASID	☐	UCAS Personal ID	UCASPER	9999999999	9999999999	+	-

National ID Type Table page

You must define GTTRID and UCASID as National ID types as described in the following table:

<i>NID Type (maximum 6 characters)</i>	<i>Default</i>	<i>Description (maximum 30 characters)</i>	<i>Short Desc (maximum 10 characters)</i>	<i>National ID Format (maximum 20 characters)</i>
UCASID	No	UCAS Personal ID	UCASPERID	9999999999 (10 digits)
GTTRID	No	GTTR Personal ID	GTTRPERID	9999999999 (10 digits)

The Import Applicant process uses the UCASID and GTTRID NID types to import GTTR and UCAS applications.

Processing UCAS and GTTR Reference Data

This section provides an overview of reference data processing and discusses how to:

- Import reference data.
- Review and map UCAS courses.
- Review and map GTTR courses.
- Review and map area of permanent residence.
- Review and map disability data.

- Review and map ethnicity data.
- Review and map residential category data.
- Review and map country data.
- Review and map nationality data.
- Review and map exam level data.

Understanding UCAS and GTTR Reference Data Processing

You must process reference data before importing applications. To process reference data, first run the Import Reference Data Application Engine (SAD_UC_IMREF) process to import the reference data. Then, use the Reference Data pages to view the imported reference data in the Campus Solutions tables.

If you selected the Import Live check box on the UCAS Configuration page, the system loads the data from UCAS into the staging tables and then into the Campus Solutions tables.

If you did not select the Import Live check box, the system loads the data from the staging tables into the Campus Solutions tables. The following table lists the staging tables that store the reference data:

<i>Staging Table</i>	<i>Stores Data Imported From</i>
PS_SAD_UC_I_SCHCTX	cvRefSchoolContextualData
PS_SAD_UC_I_INST	cvInstitution
PS_SAD_UC_I_REGION	cvnRefRegion
PS_SAD_UC_I_CVCOURSE	cvCourse
PS_SAD_UC_I_CVGCOURSE	cvgCourse
PS_SAD_UC_I_KEYWORD	cvRefKeyword
PS_SAD_UC_I_SCHOOL	cvSchool
PS_SAD_UC_I_SCHOOLCONT	cvSchoolContact
PS_SAD_UC_I_SCHOOLTYPE	cvRefSchoolType
PS_SAD_UC_I_ESTGROUP	cvRefEstGroup
PS_SAD_UC_I_APR	cvRefAPR
PS_SAD_UC_I_DIS	cvRefDis
PS_SAD_UC_I_ETHNIC	cvRefEthnic
PS_SAD_UC_I_RESCAT	cvRefResCat

Staging Table	Stores Data Imported From
PS_SAD_UC_I_COUNTRY	cvRefCountry
PS_SAD_UC_I_NATIONLTY	cvRefNationality
PS_SAD_UC_I_POCC	cvRefPOCC
PS_SAD_UC_I_SOCCLASS	cvRefSocialClass
PS_SAD_UC_I_SOCIOECON	cvRefSocioEconomic
PS_SAD_UC_I_CARE	cvRefCare
PS_SAD_UC_I_SPONSOR	cvRefPrepSponsor
PS_SAD_UC_I_SCHOOLYEAR	cvRefSchoolYear
PS_SAD_UC_I_PARENTHE	cvRefParentinHE
PS_SAD_UC_I_FEE	cvRefFee
PS_SAD_UC_I_EBLSUBJ	cvEBLSubject
PS_SAD_UC_I_AWARDBODY	cvRefAwardBody
PS_SAD_UC_I_EXAM	cvRefExam
PS_SAD_UC_I_SUBJ	cvRefSubj
PS_SAD_UC_I_UNITS	cvRefUnits
PS_SAD_UC_I_OEQ	cvRefOEQ
PS_SAD_UC_I_DEGRSUBJ	cvgRefDegreeSubject
PS_SAD_UC_I_OFFABBR	cvRefOfferAbbrev
PS_SAD_UC_I_UVOFFABBR	uvOfferAbbrev
PS_SAD_UC_I_STATUS	cvRefStatus
PS_SAD_UC_I_OFFERSUBJ	cvRefOfferSubj
PS_SAD_UC_I_ERROR	cvRefError
PS_SAD_UC_I_CVAMEND	cvRefAmendments
PS_SAD_UC_I_CVGAMEND	cvgRefAmendments
PS_SAD_UC_I_CAREDUR	cvRefCareDuration

Staging Table	Stores Data Imported From
PS_SAD_UC_I_TARIFF	cvRefTariff
PS_SAD_UC_I_LEA	cvRefLea

If you selected both the GTTR and UCAS check boxes on the UCAS Configuration page, the system loads both the UCAS and GTTR reference data.

The system imports cvRefSchoolContextualData data only if you have selected the Contextual Data check box and the UCAS Cycle is 2012 or greater on the UCAS Configuration page.

After loading the reference data, you need to use the Reference Data pages to map the UCAS values to the Campus Solutions values. For example, you must map the UCAS courses to the Campus Solutions careers, programs, and plans. Additionally, you can use the Reference Data pages to review whether the Import Reference Data process imported all the required data.

For information about the fields on the Reference Data pages that display the imported data, refer to the ODBC-link Technical Manual.

All the Reference Data pages have Active and Imported check boxes. Clear the Active check box to deactivate a manually added reference data record.

The system enables the Active check box for records that you entered manually through the Reference Data pages. However, the system disables the Active check box for imported records.

The Imported check box indicates whether you imported or manually added the reference data. If you manually add the data on a Reference Data page, then the system clears the Imported check box.

For cvName/cvNameU and cvgName/cvgNameU, the system does not import the data into Campus Solutions. Therefore, staging tables do not exist for these views. The Personal ID look up icon directly queries these views to display the applicant values on the UCAS and GTTR Enquiry Entry pages. If the Unicode check box is selected on the UCAS Configuration page, then the lookup queries the NameU version of the view.

Pages Used to Process UCAS and GTTR Reference Data

Page Name	Definition Name	Navigation	Usage
Import Reference Data	SAD_UC_IMP_REF_PRC	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Import Reference Data	Import UCAS reference data into your database.
UCAS Courses	SAD_UC_COURSE	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, UCAS Course	View the imported cvCourse data or manually enter the UCAS course data into your database. Also, map a UCAS course with a Campus Solutions academic career, program, plan, subplan, application center, and campus.

Page Name	Definition Name	Navigation	Usage
Area of Permanent Residence	SAD_UC_APR	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Area of Permanent Residence	View the imported cvRefAPR domicile data or manually enter the APR data into your database. Also, map the UCAS domicile to the Campus Solutions country code.
Country	SAD_UC_CNTRY	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Country	View the imported cvRefCountry data or manually enter the UCAS country data into your database. Also, map the UCAS country code to the Campus Solutions country code.
Disability	SAD_UC_DIS	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Disability	View the imported cvRefDis data or manually enter the UCAS disability data into your database. Also, map the UCAS disability code to the Campus Solutions disability code and type of impairment.
Ethnic	SAD_UC_ETHNIC	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Ethnic	View the imported cvRefEthnic data or manually enter the UCAS ethnic data into your database. Also, map the UCAS ethnicity code to the Campus Solutions set ID, regulatory region, and ethnicity group.
Nationality	SAD_UC_NATION	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Nationality	View the imported cvRefNationality data or manually enter the UCAS nationality data into your database. Also, map the UCAS nationality code to the Campus Solutions country and citizenship codes.

Page Name	Definition Name	Navigation	Usage
Residential Category	SAD_UC_RESCAT	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Residential Category	View the imported cvRefResCat data or manually enter the UCAS residential category data into your database. Also, map the UCAS residential category code to the Campus Solutions residency code.
Import Examination Results	SAD_UC_EXAM	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Exam Levels	View the imported cvRefExam data or manually enter the UCAS exam level data into your database. Also, map the UCAS exam level to the Campus Solutions qualification type.
EBL Subject	SAD_UC_EBLSUB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, EBL Subject	View the imported cvEBLSubject data or manually enter the UCAS EBL Subject data into your database.
Institution	SAD_UC_INST	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Institution	View the imported cvInstitution data or manually enter the UCAS institution data into your database.
NHS Region	SAD_UC_REGION	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, NHS Region	View the imported cvnRefRegion data or manually enter the NHS Region data into your database.
Awarding Body	SAD_UC_AWDBDY	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Awarding Body	View the imported cvRefAwardBody data or manually enter the UCAS awarding body data into your database.
In Care	SAD_UC_CARE	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, In Care	View the imported cvRefCare data or manually enter the UCAS In Care data into your database.
In Care Duration	SAD_UC_CAREDUR	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, In Care Duration	View the imported cvRefCareDuration data or manually enter the UCAS In Care Duration data into your database.

Page Name	Definition Name	Navigation	Usage
Error Code	SAD_UC_ERROR	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Error Code	View the imported cvRefError data or manually enter the UCAS Error Code data into your database.
Establishment Group	SAD_UC_ESTGRP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Establishment Group	View the imported cvRefEstGroup data or manually enter the UCAS establishment group data into your database.
Fee Payer	SAD_UC_FEE	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Fee Payer	View the imported cvRefFee data or manually enter the UCAS fee payer data into your database.
Keyword	SAD_UC_KEY	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Keyword	View the imported cvRefKeyword data or manually enter the UCAS keyword data into your database.
LEA	SAD_UC_LEA	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, LEA	View the imported cvRefLea data or manually enter the LEA codes into your database.
Other Exam Qualifications	SAD_UC_OEQ	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Other Exam Qualifications	View the imported cvRefOEQ data or manually enter the UCAS Other Exam Qualifications data into your database.
Offer Abbreviation	SAD_UC_COFABB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Offer Abbreviation	View the imported cvRefOfferAbbrev data.
Offer Subject	SAD_UC_OFFSUB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Offer Subject	View the imported cvRefOfferSubj data or manually enter the UCAS Offer Subject data into your database.
Parent in Higher Education	SAD_UC_PARHE	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Parent in Higher Education	View the imported cvRefParentinHE data or manually enter the UCAS Parent in Higher Education data into your database.

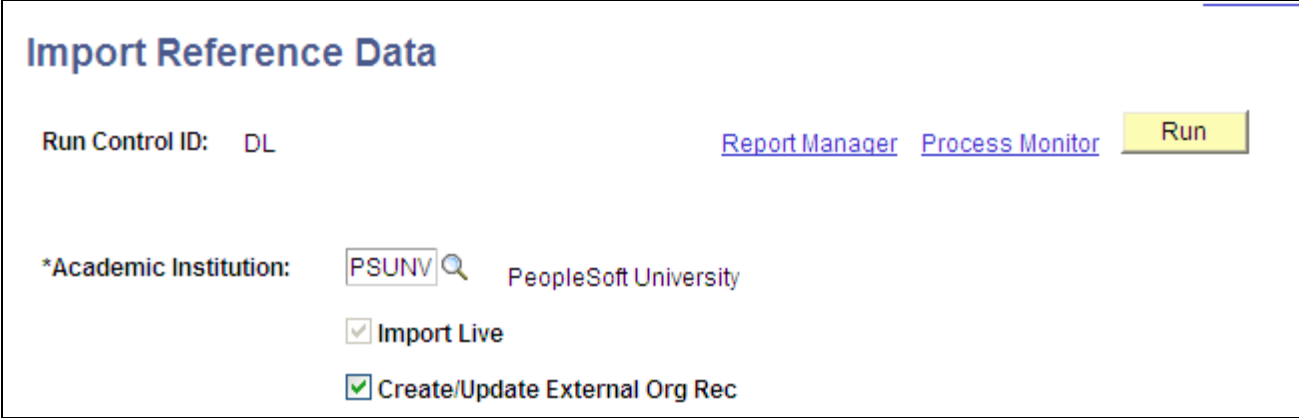
Page Name	Definition Name	Navigation	Usage
Parental Occupation	SAD_UC_POCC	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Parental Occupation	View the imported cvRefPOCC data or manually enter the UCAS Parental Occupation data into your database.
Sponsor	SAD_UC_PRESPN	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Sponsor	View the imported cvRefPrepSponsor data or manually enter the UCAS sponsor data into your database.
School	SAD_UC_SCHOOL	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, School	View the imported cvSchool and cvSchoolContact data. Click the External Org Details link to update or view the details of the External Organization that is mapped to the school.
School Contextual Data	SAD_UC_SCH_CTXT	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, School Contextual Data	View the imported cvRefSchoolContextualData data or manually enter the School Contextual data into your database.
School Type	SAD_UC_SCHTYP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, School Type	View the imported cvRefSchoolType data or manually enter the UCAS school type data into your database.
School Year	SAD_UC_SCHYR	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, School Year	View the imported cvRefSchoolYear data or manually enter the UCAS school year data into your database.
Social Class	SAD_UC_SOCCLS	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Social Class	View the imported cvRefSocialClass data or manually enter the UCAS social class data into your database.
Socio Economic	SAD_UC_SOCECO	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Socio Economic	View the imported cvRefSocioEconomic data or manually enter the UCAS Socio Economic data into your database.

Page Name	Definition Name	Navigation	Usage
Status	SAD_UC_STATUS	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Status	View the imported cvRefStatus data or manually enter the UCAS status data into your database.
Subject	SAD_UC_SUB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Subject	View the imported cvRefSubj data or manually enter the UCAS subject data into your database.
Units	SAD_UC_UNITS	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Units	View the imported cvRefUnits data or manually enter the UCAS unit data into your database.
Institution Course Keyword	SAD_UC_CRSKEY	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Institution Course Keyword	View the imported uvCourseKeyword data or manually enter the UCAS Institution Course Keyword data into your database. If required, update or add keywords that users can use to search for the course in the UCAS course web search utility.
Institution Offer Abbreviation	SAD_UC_UOFABB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Institution Offer Abbreviation	View the imported uvOfferAbbrev data or manually enter the UCAS Institution Offer Abbreviation data into your database.
Tariff Scores	SAD_UC_TARIFF	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, Tariff Scores	View the imported cvRefTariff data or manually enter the UCAS tariff data into your database.
GTTR Course	SAD_UC_GCOURSE	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, GTTR Course	View the imported cvgCourse data or manually enter the GTTR course data into your database. Also, map a GTTR course with a Campus Solutions academic career, program, plan, sub-plan, application center, and campus.

Page Name	Definition Name	Navigation	Usage
GTTR Degree Subject	SAD_UC_GDSUB	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Reference Data, GTTR Degree Subject Table	View the imported cvgRefDegreeSubject data or manually enter the GTTR degree subject data into your database.
Regional	EXT_ORG_TBL_REG	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional	View the imported cvSchool data or manually enter the UCAS school data into your database. The system enables the UK UCAS School Data region only if you select the HESA, UCAS check box on the SA Features page.

Importing Reference Data

Access the Import Reference Data page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Import Reference Data).



Import Reference Data

Run Control ID: DL [Report Manager](#) [Process Monitor](#) [Run](#)

*Academic Institution:  PeopleSoft University

☒ Import Live

☒ Create/Update External Org Rec

Import Reference Data page

The Import Reference Data process imports reference data based on UCAS timestamps. After the process runs, you can view the latest timestamp information on the Internal Timestamp page. Refer to the Defining a Timestamp for Re-importing Data topic in this document for more information about the Internal Timestamp page.

Import Live

Indicates how the Import Reference Data process loads data into the Campus Solutions tables.

You cannot select or clear this check box. The system selects this check box if you selected the Import Live check box on the UCAS Configuration page.

If the system selects the check box, the import process loads the data into the staging tables and then into the Campus Solutions tables. If the system does not select the check box, the import process loads the data from the staging tables into the Campus Solutions tables.

Academic Institution

Enter the academic institution for which you want to import the data.

Create/Update External Org Rec

Select this check box to instruct the process to create or update an external organization record for the imported school.

If you select this option, and if the process does not find a corresponding external organization record for the imported school, it creates an external organization record. You can view this external organization record using the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table).

If you select this option, and if the process finds a corresponding external organization record that needs to be updated, it creates a new effective dated record in the Organization Table page. For example, suppose a school's contact email ID has changed and the school already has an associated external organization record in Campus Solutions. When you import the school reference data, the process inserts a new record with the new email ID of the contact.

If the check box is cleared, the process imports the cvSchool and cvSchoolContact records into the Campus Solutions tables but does not create external organization records.

Creation of External Org records can cause the process to run slowly. Therefore, you can first run the Import Reference Data process without selecting this check box. Then you can run the process again with the Create/Update External Org Rec check box selected to create the external organization records.

Reviewing and Mapping UCAS Courses

Access the UCAS Course page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, UCAS Course).

UCAS Course

Academic Institution: PSUNV PeopleSoft University
UCAS Institution Code: X99
UCAS Course Code: E150
Campus: *
Entry Year: 2012
Entry Month: 9

Short Name: BA/Art
Long Name: Fine Ar

Mapping

Academic Career: Undergrad 
Academic Program: BALAU  BA Liberal Arts Programs
Academic Plan: ART  Art (BFA)
Academic Sub-Plan: 
Application Center: 
Campus: 

Faculty: A
☐ **Joint Admission** ☒ **Open Extra**
☐ **Interview or Audition Required** ☐ **Portfolio Required**
Status: OPEN
Start Date:
Age Restriction:
Course Type
☐ **Criminal Check Required**
UCAS Timestamp 09/06/10 6:23:24AM
☒ **Imported** ☒ **Active**

UCAS Course page

Note. If the UCAS Campus value in cvCourse is *null* (that is, the institution does not have separate UCAS campus codes), then the Import Reference Data process imports the value as *. If you are adding course records manually, you need to add either a valid UCAS campus value or *.

UCAS Timestamp

Displays the date and time when UCAS updated the cvCourse view.

This field is read-only and only appears for imported records. For manually added records, this field is blank and you do not need to enter a value.

Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of UCAS course code, entry year and entry month that may exist in an imported application choice. The remaining fields in the Mapping group box are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to the UCAS application choice.

If you do not map the Application Center and Campus values on this page, then the system uses the default values defined in the UCAS Application Import page.

Reviewing and Mapping GTTR Courses

Access the GTTR Course page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, GTTR Course).

GTTR Course

Academic Institution:

PSUNV

PeopleSoft University

UCAS Institution Code:

X99

GTTR Course:

GT32

Campus:

*

Entry Year:

2009

Entry Month:

9

Long Name:

Business Statistics/Japanese Studies

Mapping

Academic Career:

Graduate

Academic Program:

GLAU

Graduate Liberal Arts Programs

Academic Plan:

UNDECL-GR

Undeclared-Graduate

Academic Sub-Plan:

Application Center:

GRAD

Graduate Admissions

Campus:

MAIN

Main Hacienda Campus

☐ Modular

Part Time:

☐ Course Cancelled

Course Cancelled Date:

Vacancy Status:

English:

Maths:

Science:

Age Range of Children:

Status:

A

☐ Criminal Check Required

UCAS Timestamp:

09/09/09 6:14:45AM

☒ Imported

☒ Active

GTTR Course page

Note. If the GTTR Campus value in cvgCourse is *null* (that is, the institution does not have separate GTTR campus codes), then the Import Reference Data process imports the value as *. If you are adding course records manually, you need to add either a valid GTTR campus value or *.

UCAS Timestamp

Displays the date and time when GTTR updated the cvgCourse view.

This field is read-only and only appears for imported records. For manually added records, this field is blank and you do not need to enter a value.

Mapping

You must map a Campus Solutions academic career, program, and plan for each combination of GTTR course code, entry year and entry month that may exist in an imported application choice. The remaining fields in the Mapping group box are optional. The system uses the mapped values when creating or updating the Campus Solutions application record related to the GTTR application choice.

If you do not map the Application Center and Campus values on this page, then the system uses the default values defined in the GTTR Application Import page.

Reviewing and Mapping Area of Permanent Residence

Access the Area of Permanent Residence page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Area of Permanent Residence).

Area of Permanent Residence

Academic Institution: PSUNV PeopleSoft University

Domicile: 001

Description: BELFAST

HESA Code: XG ☒ LEA Flag

Mapping

Country: GBR United Kingdom

State: BFS Belfast

☒ Imported

☒ Active

Area of Permanent Residence page

Mapping

In the Country and the State fields, enter the Campus Solutions country and state codes to map to the UCAS domicile code.

Reviewing and Mapping Disability Data

Access the Disability page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Disability).

Disability

Academic Institution:PSUNVPeopleSoft University

Disability Code:3

DescriptionDeaf/partial hearing

HESA Code:03

Mapping

Disability:Hearing

Type of Impairment:Hearing Disability

☒ Imported

☒ Active

Disability page

Mapping

In the Disability and Type of Impairment fields, enter the Campus Solutions disability and type of impairment codes to map to the UCAS disability code.

Reviewing and Mapping Ethnicity Data

Access the Ethnic page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Ethnic).

Ethnic

Academic Institution:PSUNVPeopleSoft University

Ethnic Code:10

Description:Whit

HESA Code:

Mapping

SetID:PSUNVPeoplesoft University

Regulatory Region:GBRUnited Kingdom

Ethnic Group:WHITEWhite British

☒ Imported

☒ Active

Ethnic page

Mapping

In the SetID field, enter the setID of your institution. In the Regulatory Region field, enter the Campus Solutions regulatory region code. In the Ethnic Group field, enter the Campus Solutions ethnic code to map to the UCAS ethnic code.

Reviewing and Mapping Residential Category Data

Access the Residential Category page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Residential Category).

Residential Category

Academic Institution:

PSUNV PeopleSoft University

Residential Category Code:

B

Description:

UK Resident

Mapping

Residency:

IC

In City

☒ Imported

☒ Active

Residential Category page

Mapping

In the Residency field, enter the Campus Solutions residency code to map to the UCAS residential category code.

Reviewing and Mapping Country Data

Access the Country page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Country).

Country

Academic Institution:

PSUNV PeopleSoft University

Country Code:

124

Description:

Great Britai

Country Type

Mapping

Country:

GBR

United Kingdom

☒ Imported

☒ Active

Country page

Mapping

In the Country field, enter the Campus Solutions country code to map to the UCAS country code.

Reviewing and Mapping Nationality Data

Access the Nationality page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Nationality).

Nationality

Academic Institution:PSUNVPeopleSoft University

Nationality:610

Description:Other

HESA Code:

Mapping

Country:CHNChina

Citizenship Status:1Citizen

☒Imported

☒Active

Nationality page

Mapping

In the Country and Citizenship Status fields, enter the Campus Solutions country and citizenship status codes to map to the UCAS nationality code.

Reviewing and Mapping Exam Level Data

Access the Import Examination Results page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, Exam Levels).

Import Examination Results

Academic Institution: PSUNV PeopleSoft University

Exam Level: A1

Description: Advanced Subsidiar

Mapping

Qualification Type AS

☒ Imported
☒ Active

Import Examination Results page

Mapping

In the Qualification Type field, enter the Campus Solutions qualification type code to map to the UCAS exam level.

Importing UCAS and GTTR Applications and Applicant Data

This section provides an overview of importing applications and applicant data into your database, and discusses how to:

- View the transaction setup.
- Define the search/match criteria.
- Enter the applicant import parameters.
- Review and edit the suspense data.
- View, update, and delete application staging data.
- Define a timestamp for re-importing data.

Understanding Importing UCAS and GTTR Applications and Applicant Data

When you import applicant data from UCAS, the system creates new person records in your database or updates details about existing person records. First, you must ensure that you are not going to create any duplicate data by setting up the search/match parameters. Then, you run the Import Applicant Data process to load the application and applicant data into your database. The search/match process determines if the person might already exist in your database. The purpose of the search/match is to prevent duplicate records. You can specify what you want the post process to do when search/match finds a match or multiple matches. It is recommended that you set the status as *Suspend* when you set up the search/match criteria for multiple matches. Based on the results of the search/match process, the import process can update the record in your database that matches the UCAS data if you are sure that the person in your database is the same person to whom the UCAS data relates.

If you selected the UCAS check box on the UCAS Configuration page, the Import Applicant Data process imports data from the UCAS iv views. If you selected the GTTR check box on the UCAS Configuration page, the Import Applicant Data process imports data from the GTTR iv views. If you selected both the UCAS and GTTR check boxes, the Import Applicant Data process imports data from both the UCAS and GTTR iv views.

If you selected the Import Live check box on the UCAS configuration page, the system loads the data from UCAS into the Campus Solutions tables through the staging tables.

If you did not select the Import Live check box because you have data in the staging tables, the system loads the data from the staging tables into the Campus Solutions tables. You can then use the Campus Solutions pages to review the data in the Campus Solutions tables.

The Import Applicant Data process imports data from the ivContextual view only if the Contextual check box is selected and the UCAS Cycle is 2012 or greater on the UCAS Configuration page. Also, the process imports data from the Unicode version of views, only if the Unicode check box is selected on the UCAS Configuration page. For example, if you have selected the Unicode check box, the process imports data from the Unicode views, such as ivStarAU and ivStarJU. Conversely, if you have not selected the Unicode check box, the process imports data from the standard views, such as ivStarA and ivStarJ.

You can view, update, or delete the suspended UCAS and GTTR application data in the staging tables using the Staging Data pages. You can search for the suspended data based on various search parameters including import status, application code and personal ID.

The import process creates a corresponding Campus Solutions application record for each imported application choice. If an applicant has more than one ChoiceNo for an AppCode at your institution, the import process creates a separate Campus Solutions application record for each AppCode and ChoiceNo combination. You can use the Maintain Applications component to access the Campus Solutions application record. Each application record will have an effective date that indicates the date when you imported the application. If you import updates to the same application on different days, the system creates new application records with the different effective dates. If you import updates to the same application multiple times on a particular day, the system updates the Campus Solutions application record for that particular date.

The import process also creates an application choice record in Campus Solutions for the imported UCAS application choice. You can use the UCAS Applications and GTTR Applications components to view the imported application choice. Refer to the *Reviewing Imported UCAS and GTTR Applications and Applicant Data* section for more information about these two components.

Suppose you are importing a UCAS or GTTR choice and its decision value already exists in ivStarC or ivgStarG. For such a choice, when you run the import process for the first time, the process creates the Campus Solutions application and populates the Program Action and Action Reason of the Application Program Data record based on the following mappings set up on the program action page of the UCAS Configuration component:

UCAS processing - ivStarC:

- If Decision = I, use action/reason for *Interview*
- If Decision = F, use action/reason for *Course Full*
- If Decision = R, use action/reason for *Rejection*
- If Decision = W, use action/reason for *Withdrawal*
- If Decision = C or D and Reply = F, use action/reason for *Conditional Firm*
- If Decision = C or D and Reply = I, use action/reason for *Conditional Insurance*
- If Decision = C or D and Reply = D, use action/reason for *Conditional Decline*
- If Decision = C or D and Reply = blank, use action/reason for *Conditional Offer*
- If Decision = U and Reply = F, use action/reason for *Unconditional Firm*
- If Decision = U and Reply = I, use action/reason for *Unconditional Insurance*
- If Decision = U and Reply = D, use action/reason for *Unconditional Decline*
- If Decision = U and Reply = blank, use action/reason for *Unconditional Offer*
- Else set program action = APPL and reason = default value (if defined) from the UCAS Application Import page of the UCAS Configuration component.

GTTR processing - ivgStarG:

- If Decision = I, use action/reason for *Interview*
- If Decision = G, use action/reason for *Course Closed*
- If Decision = R, E, M, or S, use action/reasons for *Rejection, Rejection - English, Rejection - Maths, Rejection - Science*
- If Decision = W, use action/reason for *Withdrawal*
- If Decision = C or D and Reply = F, use action/reason for *Conditional Firm*
- If Decision = C or D and Reply = D, use action/reason for *Conditional Decline*
- If Decision = C or D and Reply = blank, use action/reason for *Conditional Offer*
- If Decision = U and Reply = F, use action/reason for *Unconditional Firm*
- If Decision = U and Reply = D, use action/reason for *Unconditional Decline*
- If Decision = U and Reply = blank, use action/reason for *Unconditional Offer*

- Else set program action = APPL, reason = default value (if defined) from the GTTR Application Import page of the UCAS Configuration component.

The Import Applicant Data process uses the Nationality page mapping to import the passport field values from StarK and create the citizenship and passport records. If the nationality value in an imported record does not have a corresponding country code mapping, then the process does not create a citizenship and passport record. The process logs an error message and the record is retained in the staging tables.

Suppose, you have mapped a nationality with a country code but did not map the same nationality with a citizenship status. In this case, if a citizenship record does not exist in Campus Solutions for the imported record, the process creates a new blank citizenship record. That is, the process enters only the Country value and leaves the Citizenship Status value as blank on the Citizenship Detail page (Add/Update a Person component).

Suppose, you have mapped a nationality *610* with a country code *CHN* and citizenship status *1* (Citizen). The citizenship record for a person named Eric with the same nationality exists in Campus Solutions with a different citizenship status *2* (Naturalized). In this case, when the process again imports Eric's record that has a nationality of *610*, it updates Eric's citizenship record in Campus Solutions with the mapped citizenship status *1*.

The Import Applicant Data process processes an incoming passport record if you have mapped the Nationality and Country values and if UCAS has provided a passport number. The process creates or updates a passport record for the applicant in the following ways:

- If the applicant's passport record with the Country and Passport Number combination exists in Campus Solutions, then the process updates that record with the incoming passport issue date, expiry date and place issued values.
- If the applicant's passport record with the Country and Passport Number combination does *not* exist in Campus Solutions, then the process creates a new record using the incoming values.

The import process uses the Forenames and Surname values from StarN to create or update a Primary and Preferred Name record in Campus Solutions. However, if Preferred First Name value from StarK exists, then the import process uses this StarK value to create or update the Preferred Name record for the applicant.

If the LastEducation value exists in the ivStarK view and the school code is mapped to a Campus Solutions External Org in the imported School reference data, the process populates this mapped External Org value in the Application School/Recruiting page for the Campus Solutions application record. If the LastEducation value does not exist, but the School value exists in the ivStarK view and the school code is mapped to a Campus Solutions External Org in the imported School reference data, the process populates this mapped External Org value in the Application School/Recruiting page.

Pages Used to Import UCAS and GTTR Applications and Applicant Data

Page Name	Definition Name	Navigation	Usage
Transaction Setup	SCC_TRANSAC_DTLS	Student Admissions, UCAS Processing, Import Applicants, Transaction Setup	View the delivered UCAS transaction that you can use in the Transaction Search/Match Setup page. Do not modify any values for this delivered UCAS transaction or create a new UCAS transaction.

Page Name	Definition Name	Navigation	Usage
Search/Match Setup	SCC_SEARCH_PARMS	Student Admissions, UCAS Processing, Import Applicants, Transaction Setup, Search/Match Setup	Define search and match parameters for the delivered UCAS transaction, which specify what UCAS data the system will append to existing records in your database and which UCAS data the system will suspend or ignore.
Import Applicant Data	SAD_UC_RUN_CNTL	Student Admissions, UCAS Processing, Import Applicants, Import Applicant Data	Import the UCAS and GTTR applications and applicant data into your system. Before you import the data, set up the search/match parameters on the Search/Match Processing pages.
Transaction Data	SCC_TRANSAC_DATA	Student Admissions, UCAS Processing, Import Applicants, Transaction Data	After you run the Import Applicant Data process, use this page to review the status of a UCAS record with regard to loading, searching/matching, and posting processing. For example, determine if a record is waiting to be processed or if a record caused a new person to be added to your database.
ivContextual Staging Data	SAD_UC_I_IVCONXT	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivContextual Staging Data	View, update, or delete the suspended ivContextual data stored in the staging tables.
ivEducation Staging Data	SAD_UC_I_EDUCAT	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivEducation Staging Data	View, update, or delete the suspended ivEducation data stored in the staging tables.
ivEmployment Staging Data	SAD_UC_I_IVEMPL	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivEmployment Staging Data	View, update, or delete the suspended ivEmployment data stored in the staging tables.
ivFormQuals Staging Data	SAD_UC_I_IVFMQ	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivFormQuals Staging Data	View, update, or delete the suspended ivFormQuals data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
ivOffer Staging Data	SAD_UC_I_OFFER	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivOffer Staging Data	View, update, or delete the suspended ivOffer data stored in the staging tables.
ivPrepActivities Staging Data	SAD_UC_I_IVPREP	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivPrepActivities Staging Data	View, update, or delete the suspended ivPrepActivities data stored in the staging tables.
ivQualification Staging Data	SAD_UC_I_IVQUAL	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivQualification Staging Data	View, update, or delete the suspended ivQualification data stored in the staging tables.
ivReference Staging Data	SAD_UC_I_IVREF	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivReference Staging Data	View, update, or delete the suspended ivReference data stored in the staging tables.
ivStarA Staging Data	SAD_UC_I_STARA	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarA Staging Data	View, update, or delete the suspended ivStarA data stored in the staging tables.
ivStarC Staging Data	SAD_UC_I_IVSTRC	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarC Staging Data	View, update, or delete the suspended ivStarC data stored in the staging tables.
ivStarH Staging Data	SAD_UC_I_IVSTH	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarH Staging Data	View, update, or delete the suspended ivStarH data stored in the staging tables.
ivStarJ Staging Data	SAD_UC_I_IVSTJ	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarJ Staging Data	View, update, or delete the suspended ivStarJ data stored in the staging tables.
ivStarK Staging Data	SAD_UC_I_IVSTK	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarK Staging Data	View, update, or delete the suspended ivStarK data stored in the staging tables.
ivStarN Staging Data	SAD_UC_I_STARN	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarN Staging Data	View, update, or delete the suspended ivStarN data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
ivStarPQR Staging Data	SAD_UC_I_IVPQR	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarPQR Staging Data	View, update, or delete the suspended ivStarPQR data stored in the staging tables.
ivStarW Staging Data	SAD_UC_I_STARW	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarW Staging Data	View, update, or delete the suspended ivStarW data stored in the staging tables.
ivStarX Staging Data	SAD_UC_I_IVSTX	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarX Staging Data	View, update, or delete the suspended ivStarX data stored in the staging tables.
ivStarZ1 Staging Data	SAD_UC_I_STARZ1	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStarZ1 Staging Data	View, update, or delete the suspended ivStarZ1 data stored in the staging tables.
ivStatement Staging Data	SAD_UC_I_IVSTAT	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivStatement Staging Data	View, update, or delete the suspended ivStatement data stored in the staging tables.
ivUnitResults Staging Data	SAD_UC_I_IVUNRS	Student Admissions, UCAS Processing, Import Applicants, UCAS Staging Data, ivUnitResults Staging Data	View, update, or delete the suspended ivUnitResults data stored in the staging tables.
ivGDegreeContents Staging Data	SAD_UC_I_IVGDGC	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGDegreeContents Staging Data	View, update, or delete the suspended ivgDegreeContents data stored in the staging tables.
ivGEducation Staging Data	SAD_UC_I_IVGDGC	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGEducation Staging Data	View, update, or delete the suspended ivgEducation data stored in the staging tables.
ivGFirstDegree Staging Data	SAD_UC_I_IVGFDG	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGFirstDegree Staging Data	View, update, or delete the suspended ivgFirstDegree data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
ivGFormQuals Staging Data	SAD_UC_I_IVGFMQ	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGFormQuals Staging Data	View, update, or delete the suspended ivGFormQuals data stored in the staging tables.
ivGOffer Staging Data	SAD_UC_I_GOFFER	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGOffer Staging Data	View, update, or delete the suspended ivGOffer data stored in the staging tables.
ivGOtherLanguages Staging Data	SAD_UC_I_IVGOLN	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGOtherLanguages Staging Data	View, update, or delete the suspended ivGOtherLanguages data stored in the staging tables.
ivGReference Staging Data	SAD_UC_I_IVGREF	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGReference Staging Data	View, update, or delete the suspended ivGReference data stored in the staging tables.
ivGStarA Staging Data	SAD_UC_I_GSTARA	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarA Staging Data	View, update, or delete the suspended ivGStarA data stored in the staging tables.
ivGStarG Staging Data	SAD_UC_I_IVSTRG	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarG Staging Data	View, update, or delete the suspended ivGStarG data stored in the staging tables.
ivGStarH Staging Data	SAD_UC_I_IVGSTH	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarH Staging Data	View, update, or delete the suspended ivGStarH data stored in the staging tables.
ivGStarJ Staging Data	SAD_UC_I_IVGSTJ	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarJ Staging Data	View, update, or delete the suspended ivGStarJ data stored in the staging tables.
ivGStarK Staging Data	SAD_UC_I_IVGSTK	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarK Staging Data	View, update, or delete the suspended ivGStarK data stored in the staging tables.

Page Name	Definition Name	Navigation	Usage
ivGStarN Staging Data	SAD_UC_I_GSTARN	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarN Staging Data	View, update, or delete the suspended ivGStarN data stored in the staging tables.
ivGStarW Staging Data	SAD_UC_I_GSTARW	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarW Staging Data	View, update, or delete the suspended ivGStarW data stored in the staging tables.
ivGStarX Staging Data	SAD_UC_I_GSTARX	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGStarX Staging Data	View, update, or delete the suspended ivGStarX data stored in the staging tables.
ivGstatement Staging Data	SAD_UC_I_IVGSTA	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGstatement Staging Data	View, update, or delete the suspended ivGstatement data stored in the staging tables.
ivGWorkExperience Staging Data	SAD_UC_I_IVGSTA	Student Admissions, UCAS Processing, Import Applicants, GTTR Staging Data, ivGWorkExperience Staging Data	View, update, or delete the suspended ivGWorkExperience data stored in the staging tables.
Internal Timestamps	SAD_UC_TIMESTAMP	Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Timestamps	For an institution, reset a timestamp to a previous date if you want to re-import UCAS records. See the highest UCAS timestamp when the view was last imported. Additionally, see the number of records that were added, deleted, or amended when the view was last imported.

Viewing the Transaction Setup

Access the Transaction Setup page (Student Admissions, UCAS Processing, Import Applicants, Transaction Setup).

[New Win](#)

Transaction Setup

Search/Match Setup

Transaction:

UCAS

*Transaction Name:

UCAS

Transaction Description:

*Transaction Status:

Active

*Data Update Rule:

DEFAULT_UPDATE_RULE

Transaction Options

☒ Online Transaction

Process Search/Match:

☐ Batch

☒ Realtime

☐ Run on Save

Transaction Handler

*Root Package ID:

SAD_UC_TRANSACTION

*Path:

TRANSACTION

*Application Class ID:

UCASTransaction

Transaction Status and Date

*Staged Record Name:

SCC_STG_CONSTIT

Constituent

Transaction Setup page (1 of 2)

Constituent Handler

*Root Package ID:

SCC_SL_TRANSACTION

*Path:

INTFC

*Application Class ID:

DefaultConstituent

Partition Data

☐ By Constituent

☒ By Transaction

Transaction Data Launch View

Menu Name:

Menu Bar Name:

Menu Item Name:

Menu Page Name:

Transaction Setup page (2 of 2)

The system uses this delivered *UCAS* transaction to process the incoming UCAS and GTTR data. Do not change any values for this transaction.

Defining the Search/Match Criteria

Access the Search/Match Setup page (Student Admissions, UCAS Processing, Import Applicants, Transaction Setup, Search/Match Setup).

Transaction Setup

Search/Match Setup

Transaction: UCAS UCAS

Run Search/Match

Process Search/Match:
☐ Batch
☒ Realtime
☐ Run on Save

Search Type: Person

'Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional

'Search Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

Match(es) Found

Customize | Find | 1-5 of 5 | First | Last

	Search Order Nbr	Description	*One Match	*Multiple Matches
1	10	Name,Addr,City,Bday,Gender,SSN	Update	Suspend
2	20	SSN Only	Update	Suspend
3	30	Name,Bday,Gender	Suspend	Suspend
4	40	Name,Gender	Suspend	Suspend
5	50	Name Only	Suspend	Suspend

No Match Found

☒ Add
☐ Suspend
☐ Ignore

Search/Match Setup page

The system uses this delivered *UCAS* transaction to process the incoming UCAS and GTTR data. Therefore, you will need to define search match parameters for the *UCAS* transaction.

Use the Search Parameter field to select the group of predefined search parameters that you want to use for the Import Applicant Data process.

Use the Search Result Field field to select a search result value that you defined in the Search Result page.

It is recommended that you change the Number of Characters of FirstNameSrchRule and LastNameSrchRule to 7 for PSCS_10, PSCS_30, PSCS_40 and PSCS_50 in the Search/Match Rules page. Select Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules to navigate to the Search/Match Rules page.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Setting Up Search/Match" for information about setting up search/match rules, search parameters, and results.

Note. You must define at least one Suffix value in the Name Suffix table (Set Up HRMS, Foundation Tables, Personal, Name Suffix)

Match(es) Found

This group box contains one row for each search/match criteria order defined by your institution. Define search/match orders on the Search/Match Criteria page.

Search Order Nbr (search order number)

For each order number, select what you want to do with the record if the search/match/post process discovers one or more matching records.

One Match and Multiple Matches

Select whether you want to add, update, suspend, or ignore matching records:

Add: Add a new record to your database using the staging table record.

Update: Update the existing record with the data in the staging table record.

Suspend: Keep the suspense record back in the staging table. Determine manually whether or not this record matches a record in your database.

Ignore: Ignore the staging table record that matched a record in your database.

The process marks the record to be purged.

No Match Found

Select one of the following options to specify what the search/match/post process should do when it does not find a matching record in your database:

Add: Add the unmatched record, including personal data, to your database.

Suspend: Keep the unmatched record in the staging tables to be looked at manually.

Ignore: Ignore the unmatched record completely. The process marks the record to be purged.

Entering the Applicant Import Parameters

Access the Import Applicant Data page (Student Admissions, UCAS Processing, Import Applicants, Import Applicant Data).

Import Applicant Data

Run Control ID: DN01

[Report Manager](#) [Process Monitor](#) Run

Import Applicant Parameters

*Academic Institution:

PSUNV

☒ Import Live

	UCAS	GTTR
Import Applicants:	☐	☐
Import Biographical Data:	☒	☒
Import Examination Results:	☒	
Import Application Choices:	☒	☒
Import HESA Data:	☒	☒

Import Applicant Data page

Academic Institution	Enter the academic institution for which you want to import data.
Import Live	Select if you want the import process to load the data into the staging tables and then into the Campus Solutions tables. If you do not select this check box, the import process loads the data from the staging tables into the Campus Solutions tables. By default, the system selects this check box if the Import Live check box on the UCAS Configuration page is selected.
Import Applicants	Indicates whether the process imports applicant data from UCAS, GTTR, or both. You cannot select or clear these check boxes. The system selects the check boxes if you have selected the UCAS and GTTR check boxes on the UCAS Configuration page. If the system selects the GTTR check box, the process imports applicant data from GTTR ivgStarN, ivgStarA, and ivgStarK views. If the system selects the UCAS check box, the process imports applicant data from UCAS ivStarN, ivStarA, and ivStarK views. Note. Either the UCAS check box or the GTTR check box for Import Applicants must appear as selected for the Import Applicant Data process to run successfully.

Import Biographical Data

Select the UCAS check box if you want to import application biographical data from the following UCAS views:

- ivStarX
- ivStarH
- ivFormQuals
- ivQualification
- ivEducation
- ivEmployment
- ivPrepActivities
- ivContextual

Select the GTTR check box if you want to import application biographical data from the following GTTR views:

- ivgStarX
- ivgStarH
- ivgFormQuals
- ivgEducation
- ivgWorkExperience
- ivgOtherLanguages
- ivgFirstDegree
- ivgDegreeContents

Select both check boxes if you want to import application biographical data from the GTTR and UCAS views.

Import Examination Results

Select the UCAS check box if you want to import data from ivStarPQR and ivUnitResults views.

Import Application Choices Select the UCAS check box if you want to import application choices from these UCAS views:

- ivStarC
- ivStarW
- ivReference
- ivStatement
- ivOffer
- ivStarZ1

Select the GTTR check box if you want to import application choices from the following GTTR views:

- ivgStarG
- ivgStarW
- ivgReference
- ivgStatement
- ivgOffer

Select both check boxes if you want to import application choices from GTTR and UCAS.

Import HESA Data

Select the UCAS check box if you want to import ivStarj data.

Select the GTTR check box if you want to import ivgStarj data.

If you have installed CRM for Higher Education, you can run an EIP batch replay process following the main Import Applicant Data process. The following example shows the options available on the Process Scheduler Request page when CRM for HE is installed.

Process Scheduler Request

User ID: PS Run Control ID: AD

Server Name: Run Date: 03/03/2010 

Recurrence: Run Time: 4:44:41AM [Reset to Current Date/Time](#)

Time Zone: 

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☐	Batch Replay UCAS	EIPUCAS	PSJob	(None) 	(None) 	Distribution
☒	SAD_UC_IMPAP	SAD_UC_IMPAP	Application Engine	Web 	TXT 	Distribution

OK Cancel

Process Scheduler Request page for the Import Applicant Data process

If you select the Batch Replay UCAS option, the Import Applicant Data process (SAD_UC_IMPAP) runs first and then the EIP Batch Replay (SCC_BAT_RPLY) runs. If you select the SAD_UC_IMPAP option, only the Import Applicant Data process runs.

For more information about the EIP Batch Replay process see *CRM for Higher Education Developer's Guide*.

Reviewing and Editing the Suspense Data

Access the Transaction Data page (Student Admissions, UCAS Processing, Import Applicants, Transaction Data).

Transaction Data

Search Match Result			
Search Parameter	PSCS_TRADITIONAL	CS_Person_Traditional	
Search Order Nbr	40	Name,Gender	
Total Matches	1		

Row Summary			
Temp Constituent ID	20	Status	Suspended
EmplID		Personal ID:	1071001919

Personal Information			
First Name	Richard	Middle Name	Lesley
Last Name	Webster	*Gender	Male
Date of Birth	01/01/1990	Email	ricky@webster.co.uk
Previous Surname	Harvey		

Address			
		Find View All First 1 of 2 Last	
Address Line 1	22 Acacia Avenue	Address Type:	CAMP
Address Line 2	Weston		
Address Line 3	Guildford	Post Code:	GU11 4GT
Address Line 4	Surrey	Country	GBR United Kingdom

Phone Type			
		Find View All First 1 of 2 Last	
*Phone Type	CELL	Telephone	07965 234567

Transaction Data page (1 of 2)

Select a duplicate							
		Customize Find View All First 1-2 of 2 Last					
Results	Results2	Additional Information					
		EmplID	Name Type	Name Effective Date	First Name	Last Name	
☐	1 Detail	0167	PRI	14/07/2010	Richard	Webster	
☐	2 Detail	0167	PRF	14/07/2010	Richard	Webster	

Transaction Data page (2 of 2)

Personal ID

Displays the value imported from the StarN staging record for suspended records and from PS_SAD_UC_APPLREC for updated or added records.

First Name, Middle Name, and Last Name	Displays the values from the primary (PRI) name type record in the constituent names staging record.
Previous Surname	Displays the value from the StarN staging record for suspended records. This field does not display a Previous Surname value for updated or added records.

Possible values for the Status field include:

- *New ID Created*: The import process added a record with a new ID to your database when the post process was run. Or the system added a record with a new ID to your database when you clicked the Add button.
- *ID Updated*: The import process updated an existing ID record with the data from the UCAS record. Or the system updated an existing ID record with the data from the UCAS record when you selected the existing ID in the Results region and then clicked the Update button.
- *Suspended*: The import process has completed running the search/match process and indicated that the record should be held for later processing.
- *Ignore*: The import process has completed running the search/match process and indicated that the record should be ignored for any processing.

Other staging statuses that you can see on the Transaction Data search page are not currently used in UCAS.

You define the logic to determine the status values in the Search/Match Setup page. For example, to give the *ID Updated* status to a record, you may have specified that if the import process does not find a matching record, then add the imported record to the tables.

The Select a Duplicate region displays the single or multiple matching records. The system disables the Add and Update buttons and hides the Select a Duplicate region if the data has been posted. Also, all the fields appear as read-only when the status is *New ID Created* or *ID Updated*.

Select a duplicate

Displays a single or multiple matching records for the imported UCAS record.

This region does not appear if no single or multiple matching record exists.

Click the Detail link to navigate to the Add/Update a Person component.

Add	Click to ignore any potential duplicates, manually add a new ID, and post the imported UCAS record to your database. When you click this button, the system posts the record and assigns an ID to the person.
Update	Click to match to an existing record and update the person record selected in the Select a Duplicate region with data from the UCAS record.

Viewing, Updating and Deleting Application Staging Data

Use the Staging Data pages to view, update, or delete the suspense data in the staging tables. The following is an example of a Staging Data page.

ivStarH Staging Data

IVSTARH Staging Data

Academic Institution: PSUNV PeopleSoft University
Personal Id: 2097000822
Application Code: UC01

[Find](#) | [View All](#) First 1 of 1 Last

Import Status:	N	Timestamp:	03/01/2009 12:00:00AM
Ethnic Code:	10		
Social Class:	2		
Date of change of Parental Occ:	24/04/2003 12:00AM		
Parental Occupation:	6212		
Last School Attended:			
Education Leave Date:			
Socio-Economic Classification:	3		

Example of a Staging Data page

The Import Status field displays any one of the following values:

- *Error*: If the Import Applicant Data process cannot load the record into the Campus Solutions tables.
- *Imported*: If the Import Applicant Data process has loaded the record into the Campus Solutions tables.
- *New*: If the Import Applicant Data process has not loaded the record into the Campus Solutions tables.
- *Pending*: If the Import Applicant Data process load is waiting for the creation of a new person ID for the applicant.

In the UCAS and GTTR StarA Staging Data search pages, the Country Code search field searches both the Correspondence Country and the Home Country values loaded from the StarA views. The search results therefore display records that have a matched search value in either the Correspondence Country field or Home Country field or both fields. For example, if you enter NLD in the Country Code search field, the system displays records that have NLD as either the Home Country or Correspondence Country or both. It is recommended that you use the Contains option when searching using this field.

The staging data pages can display data from either the Unicode views or the standard views. For example, if you have selected the Unicode check box on the UCAS Configuration page, the StarA Staging Data page displays the ivStarAU data. Conversely, if you have not selected the Unicode check box on the UCAS Configuration page, the StarA Staging Data page displays the ivStarA data.

Defining a Timestamp for Re-importing Data

Access the Internal Timestamp page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Timestamps).

Internal Timestamp

Academic Institution:

PSUNV

PeopleSoft University

UCAS System:

UCAS

UCAS View:

ivQualification

Timestamp:

25/06/07 11:32:29PM

Override:



Last Run Timestamp:

Records Added:

12

Records Amended:

Records Deleted:

Internal Timestamp page

Timestamp	Displays the highest UCAS timestamp for the view when it was last imported.
Override	Specify an override date if you want to reload a particular view. After specifying the override date, run the import process. The import process then imports the UCAS view records that have a timestamp of on and after the specified override date. The default system time for the specified override date is 00:00:00. After the import process finishes, the system sets the Override field value to blank.
Last Run Timestamp	Displays the latest timestamp used by the import process when it was last run.
Records Added	Displays the number of records that the import process added when the process last ran.

Records Amended	Displays the number of records that the import process modified when the process last ran.
Records Deleted	Displays the number of records that the import process deleted when the process last ran.

The following scenario describes how the Internal Timestamp page displays its field values:

1. You have already imported records for a view that has UCAS timestamps up to and including July 31, 2008. Therefore, the Timestamp field on the Internal Timestamp page displays the date *July 31, 2008*.
2. You now want to re-import data for the view that UCAS has modified and added on or after May 31, 2008, 12 AM.
3. On August 4, 2008 enter an override date of May 31, 2008 in the Internal Timestamp page and run the Import Applicant Data process.
4. After the Import Applicant Data process completes importing the data, the system sets the Override date field as blank and sets the Last Run Timestamp field as *May 31, 2008* because May 31, 2008 was the override timestamp date that the system used when the process was run.
5. The Internal Timestamp page displays the number of records that the import process added, amended, and deleted on August 4, 2008.
6. The Timestamp field on the Internal Timestamp page still displays the date *July 31, 2008* if no records were found in the UCAS view with timestamps greater than July 31. If the import process imported records in the UCAS view that had a timestamp of August 1, 2008, then the Timestamp field displays the date *August 1, 2008*.

Reviewing Imported UCAS and GTTR Applications and Applicant Data

This section provides an overview of reviewing the imported admissions data and discusses how to review the imported admissions data.

Understanding Reviewing Imported UCAS and GTTR Applications and Applicant Data

After you load the UCAS applicant data into the Campus Solutions tables, use the UCAS Applications and GTTR Applications components to review the imported applications and applicant data. Refer to the ODBC-link Technical Manual for information about the fields displayed on the UCAS Applications and GTTR Applications components.

These components also enable you to view and maintain the Campus Solutions admission application record for the imported UCAS or GTTR application. For example, you can click the admission application number link on the Choices grid of the UCAS Applicant Summary to navigate to the Maintain Applications component. Use the Maintain Applications component to maintain the Campus Solutions admission application record for the imported UCAS application.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Adding and Updating Applications", Updating Applications, for more information about the Maintain Applications component.

The UCAS Applications and GTTR Applications components also enable you to view and maintain the person records that the import process creates for the applicants. For example, you can click the Personal Information link on any page of the UCAS Applications component to navigate to Campus Community's Add/Update a Person component. Note that the import process creates various other personal information records, such as Citizenship and Passport Data records, Impairment records, and Residency records, that you can review using the Campus Community menus.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*

The applicant summary pages of both these components displays a decision entry link that enables you to navigate to a decision entry/update page where you can enter or update a decision for the imported application. When you click this link, the system displays the Initial Decision Entry page if a decision record does not exist for the UCAS or GTTR application. If a decision record does exist for the UCAS or GTTR application, the system displays the Decision Processing page.

See "Processing Imported UCAS and GTTR Applications and Applicant Data" section in this chapter, for more information about the initial decision entry and decision processing pages for UCAS and GTTR.

When a service indicator is assigned to a person ID, the corresponding negative or positive service indicator button appears on all the pages of the UCAS Applications component or GTTR Applications component for that person ID.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, Managing Service Indicators

Note that UCAS and GTTR application search pages enforce application center security. The system restricts the search results on the UCAS and GTTR decision pages based on the application centers defined for the user (Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security). You can view the UCAS or GTTR application only if your User ID has access to the application center of the related Campus Solutions application. For example, suppose that user ID SATRN11 does not have access to the UGRD application center. In such a case, the UCAS Applications page does not allow SATRN11 to access an application associated with the UGRD application center.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Recruiting and Admissions", for more information about application center security.

The system applies the same application center security to UCAS and GTTR application pages and the Maintain Applications component.

Pages Used to Review Imported UCAS and GTTR Applications and Applicant Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
UCAS Applicant Summary	AD_UC_APPL	Student Admissions, UCAS Processing, UCAS Applications, UCAS Applicant Summary	View the imported UCAS applicant record and data from ivStarC and ivStarK application and applicant data. View a summary of the application choices for your institution, application status, and applicant biographical details.
Choices	SAD_UC_CHOICE_DTL	Student Admissions, UCAS Processing, UCAS Applications, Choices	View the applicant's imported application choices (ivStarC data) and the related Campus Solutions application records.
Statements	SAD_UC_STATEMENTS	Student Admissions, UCAS Processing, UCAS Applications, Statements	View the applicant's imported ivStatement data.
References	SAD_UC_REFERENCES	Student Admissions, UCAS Processing, UCAS Applications, References	View the applicant's imported ivReference data.
Qualifications	SAD_UC_FRMQUAL	Student Admissions, UCAS Processing, UCAS Applications, Qualifications	View the applicant's imported ivFormQuals and ivStarPQR data.
Unit Results	SAD_UC_IVUNRS_SP	Student Admissions, UCAS Processing, UCAS Applications, Qualifications, Subject Detail, Unit Results	View the applicant's imported ivUnitResults data.
Qualification Summary	SAD_UC_QUAL_SUMM	Student Admissions, UCAS Processing, UCAS Applications, Qualification Summary	View the applicant's imported ivQualification and ivStarK data.
Education	SAD_UC_EDUCAT	Student Admissions, UCAS Processing, UCAS Applications, Education	View the applicant's imported ivEducation data.
Employment	SAD_UC_IVEMPL	Student Admissions, UCAS Processing, UCAS Applications, Employment	View the applicant's imported ivEmployment data.

Page Name	Definition Name	Navigation	Usage
Preparatory Activities	SAD_UC_IVPREP	Student Admissions, UCAS Processing, UCAS Applications, Preparatory Activities	View the applicant's imported ivPrepActivities data .
HESA Data	AD_UC_HESA_DTL	Student Admissions, UCAS Processing, UCAS Applications, HESA Data	View the applicant's imported ivStarH and ivStarK HESA details.
GTTR Applicant Summary	SAD_UC_GTAPPL	Student Admissions, UCAS Processing, GTTR Applications, GTTR Applicant Summary	View the imported GTTR applicant record and the imported ivgStarG and ivgStarK application and applicant details. View a summary of the application choices, application status, and applicant biographical details.
Choices	SAD_UC_CHOICEGT_DT	Student Admissions, UCAS Processing, GTTR Applications, Choices	View the applicant's imported application choices (ivgStarG data) and the related Campus Solutions application records. Check whether the Import Applicant Data process has marked the application choice as clearing application. The process marks the application choice as clearing if ClearingStatus from ivgStarK is 2 (under consideration by institution) or 3 (accepted in clearing) and the ivgStarG Round Number is equal to or greater than the ivgStarK Round Number.
Statements	SAD_UC_STATEMENTS	Student Admissions, UCAS Processing, GTTR Applications, Statements	View the applicant's imported ivgStatement data.
Qualifications	SAD_UC_FRMQUAL	Student Admissions, UCAS Processing, GTTR Applications, Qualifications	View the applicant's imported ivgFormQuals data.
References	SAD_UC_REFERENCES	Student Admissions, UCAS Processing, GTTR Applications, References	View the applicant's imported ivgReference data.

Page Name	Definition Name	Navigation	Usage
Degree Details	SAD_UC_DEG_DTLS	Student Admissions, UCAS Processing, GTTR Applications, Degree Details	View the applicant's imported ivgFirstDegree and ivgDegreeContents data.
Work Experience	SAD_UC_IVGEXP	Student Admissions, UCAS Processing, GTTR Applications, Work Experience	View the applicant's imported ivgWorkExperience data.
Other Languages	SAD_UC_IVGOLN	Student Admissions, UCAS Processing, GTTR Applications, Other Languages	View the applicant's imported ivgOtherLanguages data.
Education	SAD_UC_EDUCAT	Student Admissions, UCAS Processing, GTTR Applications, Education	View the applicant's imported ivgEducation data.
HESA Details	SAD_UC_HESA_GT_DTL	Student Admissions, UCAS Processing, GTTR Applications, HESA Details	View the applicant's imported ivgStarH and ivgStarK HESA details.
Biographical Details	SCC_BIO_DEMO_PERS	Click the Personal Information link on any page of the UCAS Applications component (SAD_UC_APPL) or the GTTR Applications component (SAD_UC_GTAPP). Campus Community, Personal Information, Add/Update a Person, Biographical Details	View or update the imported ivStarN, ivStarA, ivgStarA, and ivgStarN applicant biographical data. Biographical data includes details such as applicant name, birth date, marital status, and address.
Application Program Data	ADM_APPL_PROG_ENT	Click the Maintain Applications link on the UCAS Applicant Summary page or the GTTR Applicant Summary page. Student Admissions, Application Maintenance, Maintain Applications, Application Program Data	View or edit the Campus Solutions program and plan data pertaining to the imported application.
External Education	SAD_EXT_EDUCATION	Records and Enrollments, Transfer Credit Evaluation, External Education	View the applicant's school information imported from ivStarK. The imported school record includes the attendance type (academic load).

Reviewing the Imported UCAS Applications and Applicant Data

Access the UCAS Applicant Summary page (Student Admissions, UCAS Processing, UCAS Applications, UCAS Applicant Summary).

UCAS Applicant Summary
Choices
Statements
References
Qualifications
Qualification Summary
Education

Name: Alexander Maxie
Academic Institution: PSGBR PeopleSoft University UK
Personal Id: 0035836757 [Personal Information](#)
Application Code: UC01

ID: 2560
Application Year: 2011

Date of Birth: 25/11/1979

Application Status

Application Date: 25/06/10 ☐ Late Application

☐ Choices All Transparent

Withdrawn:
Status: 10 Referred

Withdrawn Date:
Extra Status:

Adjustment Status:
EAS: UK Home

Registration Date:
Fee Level: Multiple

Expiry Date:

Choices

Customize | Find |
First 1 of 1 Last

Choice Number	UCAS Course	UCAS Course Name	UCAS Campus	Entry Year	Entry Month	Entry Point	Decision	Reply	Adjustment	Choice Details	Maintain Applications	Decision Entry
2	B904	MA/HS	*	2011	9	1				Choice Details	00024827	Decision Entry

Other Institution Choices

Customize | Find | View All |
First 1 of 1 Last

Choice Number	Institution Code	Name	UCAS Course	UCAS Course Name	Entry Year	Entry Month	Entry Point	Decision	Reply	Summary Condition
5	M20	University of Manche	L100	MA/Econ	2011	9	1			

UCAS Applicant Summary page (1 of 3)

▼ Biographical Details			
School:	00200	APPLY 2005, CHELTENHAM	Last Education:
Fee Payer:	02	SLC, SAAS, NIBd, EU, Chl, IoM	UK Entry Date:
Residential Category:	1	UK Citizen or EU National	
Domicile (APR):	161	Aberdeen	Country of Birth:
Nationality:	000	UK national	000 United Kingdom
Passport Number:			
Place Issued:			☐ Student Visa Required
Issue Date:			Expiration Date:
Disability:	A	No disability	
Criminal Conviction:	No		☐ Criminal Records Declared
Special Needs:			
Support Arrangements:			
Unavailable:	01/08/2010		
Preferred First Name:			Previous Surname:
Nominee Name:	Dad		Nominee Relationship:
Diploma:			Father
Cambridge PreU:			
Principal Learning:			
Expected Qual Level:	B	Below degree level	
Expected Qual Code:	P50	A/AS level	
Attained Qual Code:	Q80	Other qualification at level 2	

UCAS Applicant Summary page (2 of 3)

▼ Identification
IELTS Reference Number:
ISA Reference Number:
National Insurance Number:
Scottish Candidate Number:
Nursing & Midwifery PIN Number:
TOEFL Reference Number:

UCAS Applicant Summary page (3 of 3)

The values in the Application Status and the Biographical Details group boxes come from ivStarK.

The system selects the Criminal Record Declared check box if any of the choice records associated with the applicant has a declared criminal record.

Processing Imported UCAS and GTTR Applications and Applicant Data

This section provides an overview of processing the imported admissions data, and discusses how to:

- Define conditions for an offer.
- Review key UCAS application information.
- Add attachments and review 3C information for UCAS application.
- Delete incorrect UCAS applicant records.
- Enter an initial admission decision for a UCAS application choice.
- Enter or update an admission decision for a UCAS application choice.
- Enter a decision for multiple UCAS application choices.
- Approve or reject a UCAS decision.
- Approve or reject multiple UCAS decisions.
- Determine whether applicants satisfy the offer conditions.
- Enter or update a UCAS Confirmation decision.
- Enter multiple UCAS Confirmation decisions.
- Approve or reject a UCAS Confirmation decision.
- Approve or reject multiple UCAS Confirmation decisions.
- Enter a decision to release an applicant into Clearing.
- Approve or reject the Release into Clearing decision.
- Enter UCAS Clearing and Adjustment details.
- Review and update UCAS qualifications.
- Generate, export, and update UCAS and GTTR transactions
- Review UCAS transactions.
- Review UCAS Clearing and Adjustment transactions.
- Handle UCAS applicant enquiries.
- Review key GTTR application information.
- Add attachments and review 3C information for GTTR application.
- Delete incorrect GTTR applicant records.
- Enter an initial admission decision for a GTTR application choice.

- Enter or update an admission decision for a GTTR application choice.
- Enter a decision for multiple GTTR application choices.
- Approve or reject a GTTR decision.
- Approve or reject multiple GTTR decisions.
- Enter or update a GTTR Confirmation decision.
- Enter multiple GTTR Confirmation decisions.
- Approve or reject a GTTR Confirmation decision.
- Approve or reject multiple GTTR Confirmation decisions.
- Enter GTTR Clearing details.
- Review and update GTTR qualifications.
- Review GTTR transactions.
- Review GTTR Clearing transactions.

Understanding Processing Imported UCAS and GTTR Applications and Applicant Data

After you import and review the applicants and their applications, delete any applicant records that UCAS has sent in error or UCAS has cancelled. The UCAS ivStarW view and the GTTR ivgStarW view contain the data related to applicants and application choices that have been sent to UCAS by mistake or subsequently cancelled at UCAS. When you use the Import Applicant Data process to import the applications and applicant data, the import process also imports the data from these two views. Use the Remove Wrong Applicants components to review the ivStarW and ivgStarW data and delete them from your database.

After reviewing and removing incorrect applicant records, use the Decision Processing or Initial Decision Entry pages to enter admission decisions for the remaining applications. The UCAS and GTTR Initial Decision Entry pages require less data entry as compared to the Decision Processing pages for making an admission decision. You can use the Initial Decision Entry pages for the quick entry of standard decisions. If decision approval is set up, use the Decision Approval pages to approve the decision.

Next, your institution communicates the admission decisions and approvals to UCAS. The following steps describe how the Campus Solutions system communicates this data to UCAS:

1. After entering or updating a decision, run the Transaction Processing process to generate a transaction . If decision approval is set up, use the Decision Approval page to approve the decision before you generate a transaction.
2. Use the Transaction Processing process to export transactions to the TRANIN view at UCAS and to import error codes once UCAS has processed the transactions. Transactions that the system loads into TRANIN include the transaction ID generated by UCAS and an error code of -1 to indicate that UCAS has not yet processed the transaction. Once UCAS fully processes the transaction, the error code is either 0 (success) or is a code that UCAS defines in the cvRefError reference data view.

UCAS runs a batch process approximately every five minutes to process incoming transactions. As a result, the Campus Solutions system may delay in reading the error codes and return1 value from TRANIN and updating its transaction records.

The following (1 and 2) describes how the system processes standards decisions which are not related to Confirmation or Clearing:

1.) When you run the Transaction Processing process for UCAS applications, the process selects each UCAS decision record where the system code equals U, transaction flag equals Y, and the approval status is either Approved or Not Required. For each decision record:

- If the latest transaction for an application has a transaction type other than LD, LA, LC, RA, or RD, the process does not generate a transaction. In these cases, you should use the UCAS Transactions page to manually create a transaction.
- If there is no previous transaction for an application and you had entered C (Conditional Offer), U (Unconditional Offer), W (Withdrawal) or R (Rejection), the process generates a LD (initial decision) transaction.
- If the most recent transaction is LD or LA (amended decision):
 - If the application is not UF and either the new decision value is different from the decision value of the existing transaction or the course details have changed, the process generates a new LA transaction.
 - If the application is UF and the new decision is equal to withdrawal, the process generates a RW transaction.
 - If the application is UF and any of the course details of the decision have changed, the process generates a RA transaction.
- If the most recent transaction is LC and there is no previous transaction, the process generates an LD transaction. If there is a previous transaction then the process generates a LA transaction.
- When the process completes processing the decisions, it sets the transaction flag for the decision record to N to indicate that transaction processing has completed.

2.) When you run the Transaction Processing process for GTTR applications, the process selects each GTTR decision record where the system code equals G, transaction flag equals Y, and the approval status is either Approved or Not Required. For each decision record:

- If the latest transaction for an application has a transaction type other than LD, LA or RA, the process does not generate a transaction. In these cases, you should use the GTTR Transactions page to manually create a transaction.
- If there is no transaction for an application and you enter I, C, U, W, R, E, M, S, or G decision, the system generates a LD (initial decision) transaction.
- If the most recent transaction is LD or LA (amended decision), then processing is same as UCAS applications and the process generates a LA, RW or RA transaction.
- When the system completes processing the decisions, it sets the transaction flag for the decision record to N to indicate that transaction processing has completed.

When the Transaction Processing process generates a new transaction record, it automatically updates the Campus Solutions application (linked to the UCAS application choice) with the program action and action reason values. For example, if transaction type equals LD and decision is I for a GTTR application, the system looks at the program action reason mapping for the decision Interview you have set up in the GTTR Program Actions page. The system then attaches the program action and action reason to the application.

Use the Standard Offers page to define conditions for an offer to send to UCAS. For example, you can define a condition *three A Levels at Grade B* that can be used for multiple application decisions. Subsequently, you can enter this condition in the Decision Processing pages when making a conditional offer. When you generate transactions for the conditional offers, the system includes this condition in the transactions to send to UCAS.

The following example is a scenario for UCAS application processing.

Enter a decision and generate a transaction:

1. Use the Initial Decision Entry pages to enter a decision. For example, enter a decision of unconditional offer.
2. Run the Transaction Processing process to generate the transaction for the unconditional offer decision. (Select the Generate Transactions check box on the Transaction Processing page.)
3. Use the UCAS Transactions page to review the transaction. For example, because you entered a decision of Unconditional Offer, the Transaction Details section of the page displays the Transaction Type LD and Decision of U.

Now you want to export this decision to UCAS and also want to know that UCAS has received this transaction.

It is recommended that you first generate transactions, review the sent transactions, and then request UCAS for acknowledgement. Normally, a time delay occurs between Campus Solutions writing the transaction to UCAS and UCAS updating the transaction with an error code. Therefore, we recommend that you do not run the transaction processing process with both the Export Transactions and Update Transactions from UCAS check boxes selected. Run the transaction processing process with the Generate Transaction check box selected first and review the sent transactions. Then, run the transaction processing process with the Update Transactions from UCAS check box selected and review the transaction for acknowledgement.

1. Run the Transaction Processing process to export the applicant's LD transaction to UCAS (select the Export Transactions check box on the Transaction Processing page.)
2. In the UCAS Transactions page, review the exported transaction (the Sent check box appears as selected).
3. Run the Transaction Processing process to receive the acknowledgment from UCAS for the exported transaction (select the Update Transactions from UCAS check box on the Transaction Processing page).
4. Use the UCAS Transactions page to review the error code for the applicant's LD transaction sent to UCAS. The error code is 0 (success) in the UCAS Transactions page, which indicates that UCAS received the institution's decision.

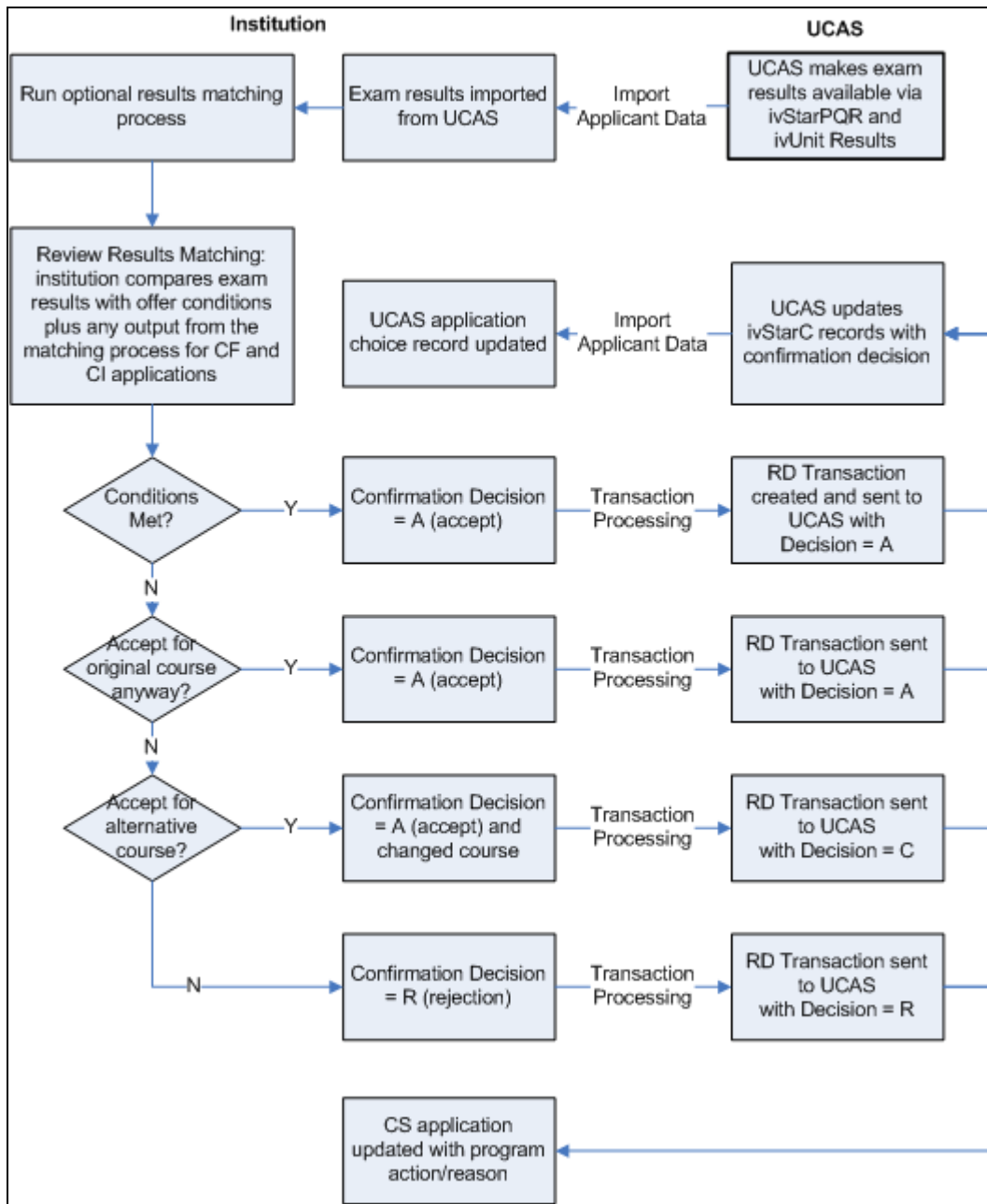
Finally, to know the UCAS applicant's response, complete these steps:

1. Run the Import Applicant Data process. If the applicant has responded to the offer, the offer response will be in ivStarC.
2. On import, Campus Solutions sets the Reply as F (for a Firm response) or I (for an Insurance response) on the UCAS Decision Processing page of the applicant if the applicant has accepted the offer. If the applicant has declined the offer, Campus Solutions sets the Reply as D.

When exam results are available, your institution will confirm conditional offers for GTTR and UCAS applications:

1. For UCAS applications, make sure you have imported cvRefTariff data (by running the Import Reference Data process) if you want to use the Results/Offer Matching process to evaluate tariff offers. This step is not applicable for GTTR applications.
2. Run the Import Applicant Data process to import the exam results.
3. Compare the applicant exam results with the offer conditions. You can do the comparison manually or run the Results/Offer Matching process. This process is not available for GTTR applications.
4. Use the Quick Confirmation page or the Confirmation Entry page to accept or reject the conditional offer.
5. Run the Transaction Processing process to generate and export the RD transaction.

The following diagram illustrates the Confirmation process flow:



Confirmation Processing Flow

The following is an example of processing the Delayed Conditional decisions:

1. Use the Decision Processing page to enter the Delayed Conditional decision for a CF application.
2. If you have selected the Conditional Offer check box on the UCAS Configuration component, use the Decision Approval page to approve this decision.
3. Run the Transaction Processing process to generate and export the RD transaction with the decision code of D.
4. A decision code of D is only valid in an RD transaction during September or October for a CF applicant. Once the results are known, use the Confirmation Entry page to confirm the DF application.

5. If you have selected the Confirmation Acceptance check box on the UCAS Configuration component, use the Confirmation Approval page to approve this decision.
6. Run the Transaction Processing process to generate and export another RD transaction for the application.

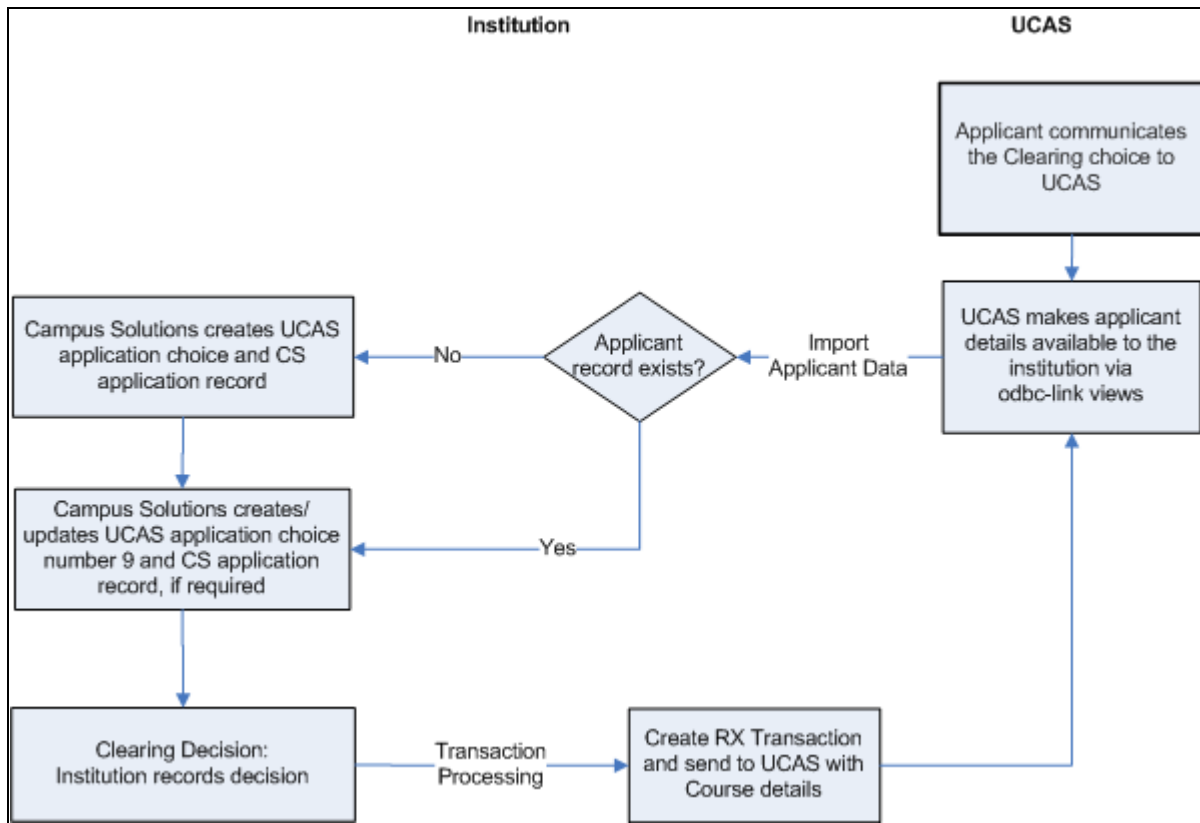
An applicant who may not have got admission in any institution is eligible for Clearing. To process Clearing applications for UCAS applicants:

1. Use the Import Applicant Data to import the Clearing application choices.
2. Use the UCAS Initial Decision Entry or the UCAS Decision Processing page to enter an admission decision for the Clearing application. To search for the Clearing applications, enter 9 in the UCAS Choice Number field of the decision search page. Note that the decision search pages do not display accepted Clearing applications (that is UCAS applications with choice number = 9 and the decision value = A).
3. Use the UCAS Enquiry Entry page to create enquiry records and record RQ Clearing transactions to request the details of a Clearing applicant. If your institution wants to offer admission to the Clearing applicant, use the UCAS Enquiry Entry page to record the RX transaction.
4. Run the Transaction Processing process to generate and export the RQ or RX transaction to UCAS. The RX transaction must have a decision value.
5. Use the Import Applicant Data process to import the application choices for Clearing if you have sent a RQ transaction.

To process Clearing applications for GTTR applicants:

1. Use the GTTR Enquiry Entry page to collect student contact address and exam results while the institution is negotiating with the student. The personal ID and application code values can be looked up from the cvgName UCAS view.
2. If the institution decides to accept or make a conditional offer to the student, enter the course, campus, entry year, entry month, transaction type (RX), decision (U or C) and decision maker.
3. Run the Transaction Processing process to generate and export the RX transaction to UCAS. The RX transaction must have a decision value.
4. Run the Import Applicant Data process to import the applicant data and application choices for the students you have sent RX transactions for.

The following diagram illustrates an example of the Clearing process flow:



Clearing Processing Flow Example

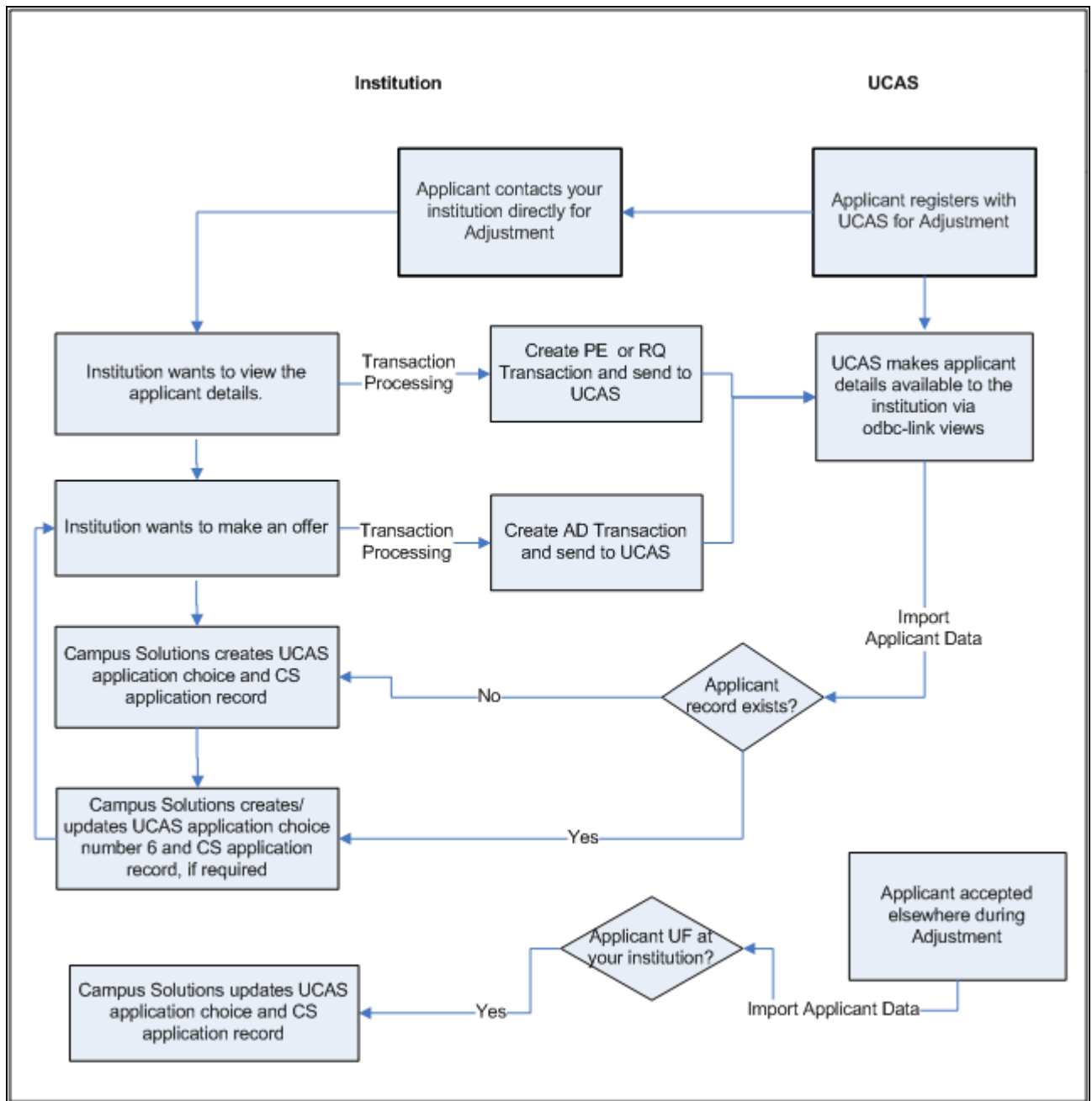
For processing Adjustment records (not applicable for GTTR applications):

1. Use the UCAS Enquiry Entry page to create Adjustment records and record RQ or PE transactions. Use this page to record the AD transaction.
2. Run the Transaction Processing process to generate and export the RQ, PE, or AD transaction to UCAS.
3. Run the Import Applicant Data process. The process imports the Adjustment application choice if you have sent an AD transaction. If you have sent a RQ or PE transaction, the process imports only Adjustment applicant data such as biographical data, and ivStarN, ivStarA and ivStarK data.

Use the UCAS Release to Clearing page to release an applicant into Clearing.

After your institution has accepted an applicant through Adjustment (that is, your institution has sent an AD transaction), the system updates the application choice to UF. If the applicant subsequently withdraws the applicant, then the institution may either release the application to clearing (RR transaction) or withdraw the applicant (RW transaction). Use the UCAS Release to Clearing page to record the RR transaction or use the UCAS Transactions page to record the RW transaction.

The following diagram illustrates an example of the Adjustment process flow:



Adjustment Processing Flow Example

When a service indicator is assigned to a person ID, the corresponding negative or positive service indicator button appears on the UCAS or GTTR decision processing pages for that person ID.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, Managing Service Indicators

Note that the UCAS and GTTR processing pages discussed in this section (except the Wrong Applicant, Standard Offer, and Result/Offer Matching Process pages) enforce application center security. The system restricts the search results on the UCAS and GTTR processing pages based on the application centers defined for the user (Set Up SACR, Security, Secure Student Administration, User ID, Application Center Security). You can view the UCAS or GTTR application only if your User ID has access to the application center of the related Campus Solutions application. For example, suppose that user ID SATRN11 does not have access to the UGRD application center. In such a case, the UCAS Decision Processing page does not allow SATRN11 to access an application associated with the UGRD application center.

The system applies the same application center security to UCAS and GTTR processing pages and the Maintain Applications component.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Securing Recruiting and Admissions"

Pages Used to Process the Imported UCAS and GTTR Applications and Applicant Data

Page Name	Definition Name	Navigation	Usage
Standard Offers	SAD_UC_STD_OFF	Student Admissions, UCAS Processing , Standard Offers	Define conditions for an offer that UCAS sends to the applicant.
UCAS Application Notes	SAD_UC_APPLNOTES	Student Admissions, UCAS Processing, UCAS Application Notes	View the key information for a UCAS application choice, on a single page. Enter notes for the application choice.
3C/Attachments	SAD_UC_3C_ATTACH	Student Admissions, UCAS Processing, UCAS Application Notes, 3C/Attachments	Add or view attachments for the Campus Solutions application record. Enter or view the 3C information for the person ID.
UCAS Wrong Applicants	SAD_UC_STARW	Student Admissions , UCAS Processing, Remove Wrong Applicants, UCAS Wrong Applicants	Review the imported applicant records from ivStarW and delete records if required.
UCAS Initial Decision Entry	SAD_UC_DECENTRY	Student Admissions, UCAS Processing, UCAS Decision Processing, Initial Decision Entry	Enter an admission decision for a UCAS application choice.

Page Name	Definition Name	Navigation	Usage
UCAS Decision Processing	SAD_UC_DECISN	Student Admissions, UCAS Processing, UCAS Decision Processing, Decision Processing	Enter or update an admission decision for a UCAS application choice. Find out whether your institution has confirmed the applicant's admission offer or released the applicant into Clearing.
UCAS Quick Decision Entry	SAD_UC_QDEC	Student Admissions, UCAS Processing, UCAS Decision Processing, Quick Decision Entry	Enter a decision simultaneously for multiple UCAS applications.
UCAS Decision Approval	SAD_UC_DECAPR	Student Admissions, UCAS Processing, UCAS Decision Approval, Decision Approval	Approve or reject the admission decision for a UCAS application choice.
UCAS Quick Decision Approval	SAD_UC_QDAPR	Student Admissions, UCAS Processing, UCAS Decision Approval, Quick Decision Approval	Approve or reject simultaneously the admission decisions for multiple UCAS applications.
Results/Offer Matching Process	SAD_UC_MATCH_PROC	Student Admissions, UCAS Processing, UCAS Decision Processing, Result/Offer Matching Process	Match exam results with conditional offer details for Confirmation. The process determines whether the applicants have satisfied the offer conditions. You can run this process for all applicants in an institution, for all applicants of a particular course, or for specific applicants. This process is optional for confirming conditional offers. You can use the Confirmation Entry page to manually determine whether an applicant has satisfied the offer conditions.

Page Name	Definition Name	Navigation	Usage
UCAS Confirmation Entry	SAD_UC_CNFDEC	Student Admissions, UCAS Processing, UCAS Decision Processing, Confirmation Entry	Accept or reject the conditional offer of an applicant. If you have not run the Results/Offer Matching process for the applicant, manually match the applicant's exam results with the conditional offer details and indicate whether the applicant has satisfied the conditions for admission.
UCAS Quick Confirmation	SAD_UC_QCONF	Student Admissions, UCAS Processing, UCAS Decision Processing, Quick Confirmation	Accept or reject the conditional offer of multiple applicants.
UCAS Confirmation Approval	SAD_UC_CNFAPR	Student Admissions, UCAS Processing, UCAS Decision Approval, Confirmation Approval	Approve or reject the Confirmation decision for an applicant.
UCAS Quick Confirmation Approval	SAD_UC_QAPR	Student Admissions, UCAS Processing, UCAS Decision Approval, Quick Confirmation Approval	Approve or reject the Confirmation decision for multiple applicants.
UCAS Release To Clearing	SAD_UC_RELDEC	Student Admissions, UCAS Processing, UCAS Decision Processing, Release to Clearing	Release an applicant into Clearing.
UCAS Release to Clearing Approval	SAD_UC_RELAPR	Student Admissions, UCAS Processing, UCAS Decision Approval, Release to Clearing Approval	Approve or reject an applicant's release into Clearing.
UCAS Enquiry Entry	SAD_UC_CLEARING	Student Admissions, UCAS Processing, UCAS Decision Processing, Enquiry Entry	Create or update an applicant's Clearing or Adjustment record. Specify whether you want the Transaction Processing process to generate an RX, RQ, PE, or AD transaction.
UCAS Qualifications	SAD_UC_IVFRMQUAL	Student Admissions, UCAS Processing, UCAS Decision Processing, Qualifications	Review and edit imported qualification and exam result records.

Page Name	Definition Name	Navigation	Usage
Transaction Processing	SAD_UC_TRN_PROC	Student Admissions, UCAS Processing, Transaction Processing, Transaction Processing	Generate, export, and update UCAS and GTTR transactions.
UCAS Transactions	SAD_UC_TRANIN	Student Admissions, UCAS Processing, Transaction Processing, UCAS Transactions	Review the UCAS transactions. In addition, manually add or delete transactions and set the hold flag to prevent the system from sending the transactions to UCAS.
UCAS Enquiry Transactions	SAD_UC_TRANINCLR	Student Admissions, UCAS Processing, Transaction Processing, UCAS Enquiry Transactions	Review the UCAS Clearing and Adjustment transactions that the Transaction Processing process has generated. Alternatively, manually add or delete Clearing or Adjustment transactions. Set the hold flag to prevent the system from sending the Clearing or Adjustment transactions to UCAS.
UCAS Confirmation Enquiries	SAD_UC_CONF_ENQ	Student Admissions, UCAS Processing, UCAS Confirmation Enquiries	Review a summary of the Confirmation or Clearing application choice. Also, enter notes and outcome codes for an application choice while handling applicant enquiries related to Confirmation and Clearing.
GTTR Application Notes	SAD_UC_GTAPPNOTE	Student Admissions, UCAS Processing, GTTR Application Notes	View the key information for a GTTR application choice, on a single page. Enter notes for the application choice.
3C/Attachments	SAD_UC_GT3C_ATTACH	Student Admissions, UCAS Processing, GTTR Application Notes, 3C/Attachments	Add or view attachments for the Campus Solutions application record. Enter or view the 3C information for the person ID.
GTTR Wrong Applicants	SAD_UC_GSTARW	Student Admissions, UCAS Processing, Remove Wrong Applicants, GTTR Wrong Applicants	Review the imported applicant records from ivgStarW and delete records if required.

Page Name	Definition Name	Navigation	Usage
GTTR Initial Decision Entry	SAD_UC_GTDECENTRY	Student Admissions, UCAS Processing, GTTR Decision Processing, Initial Decision Entry	Enter an admission decision for a GTTR application choice
GTTR Decision Processing	SAD_UC_GTDECISN	Student Admissions, UCAS Processing, GTTR Decision Processing, Decision Processing	Enter or update an admission decision for a GTTR application choice.
GTTR Quick Decision Entry	SAD_UC_QGTDEC	Student Admissions, UCAS Processing, GTTR Decision Processing, Quick Decision Entry	Enter a decision simultaneously for multiple GTTR applications.
GTTR Qualifications	SAD_UC_IVGFRMQUAL	Student Admissions, UCAS Processing, GTTR Decision Processing, Qualifications	Review and edit imported qualification records.
GTTR Decision Approval	SAD_UC_GTDECAPR	Student Admissions, UCAS Processing, GTTR Decision Approval, Decision Approval	Approve or reject the admission decision for a GTTR application choice.
GTTR Quick Decision Approval	SAD_UC_QGTDAPR	Student Admissions, UCAS Processing, GTTR Decision Approval, Quick Decision Approval	Approve or reject simultaneously the admission decisions for multiple GTTR applications.
GTTR Confirmation Entry	SAD_UC_GTCNFDEC	Student Admissions, UCAS Processing, GTTR Decision Processing, Confirmation Entry	Accept or reject the conditional offer of a GTTR applicant.
GTTR Quick Confirmation	SAD_UC_QGTCONF	Student Admissions, UCAS Processing, GTTR Decision Processing, Quick Confirmation	Accept or reject the conditional offer of multiple GTTR applicants.
GTTR Confirmation Approval	SAD_UC_GTAPR	Student Admissions, UCAS Processing, GTTR Decision Approval, Confirmation Approval	Approve or reject the Confirmation decision for a GTTR applicant.
GTTR Quick Confirmation Approval	SAD_UC_QGTAPR	Student Admissions, UCAS Processing, GTTR Decision Approval, Quick Confirmation Approval	Approve or reject the Confirmation decision for multiple GTTR applicants.

Page Name	Definition Name	Navigation	Usage
GTTR Enquiry Entry	SAD_UC_GTCLRING	Student Admissions, UCAS Processing, GTTR Decision Processing, Enquiry Entry	Create or update an applicant's Clearing record. Specify whether you want the Transaction Processing process to generate an RX.
GTTR Transactions	SAD_UC_GTTRANIN	Student Admissions, UCAS Processing, Transaction Processing, GTTR Transactions	Review GTTR transactions that you have sent or not sent. In addition, manually add or delete transactions and set the hold flag to prevent the system from sending the transactions to UCAS.
GTTR Enquiry Transactions	SAD_UC_GTTRNCLR	Student Admissions, UCAS Processing, Transaction Processing, GTTR Enquiry Transactions	Review the UCAS Clearing transactions that the Transaction Processing process has generated. Alternatively, manually add or delete Clearing transactions. Set the hold flag to prevent the system from sending the Clearing transactions to GTTR.
ID Delete	RUNCTL_ID_CHANGE	Campus Community, Personal Information, ID Management, ID Delete	Delete an ID from the database after initiating the removal process of the ID in the UCAS Wrong Applicants or the GTTR Wrong Applicants pages.

Defining Conditions for an Offer

Access the Standard Offers page (Student Admissions, UCAS Processing, Standard Offers).

Standard Offers

Academic Institution: PSUNV PeopleSoft University **System:** UCAS
Decision: C Conditional Offer **Offer Code:** NG1
***Description:** 3 B's @ A Level

Line Number	Abbrev	Grade / Mark	@ or /	Subject	End /	Text		
1	GC	B		ECON			+	-
2	GC	B		BIOL			+	-
3	GC	B		CHEM			+	-

Comment:
Free Format:

^
v

Letter Text This offer is subject to your obtaining
 GCE A Level
 Grade B Economic
 GCE A Level
 Grade B Biolog
 GCE A Level
 Grade B Chemistr

Transaction Code:

C.GC,BECON,.GC,BBIOL,.GC,B
 CHEM

Summary of Conditions:
 ☐ Manual Matching Required
 ☒ Active

Standard Offers page

For GTTR, you should enter only the interview date element in the Free Format field and not the interview time. For UCAS, you can enter both the interview date and time in the Free Format field.

You can use the Decision Code field in the Decision Processing, Initial Decision and Quick Decision pages to select a standard offer. On selecting a standard offer, the system populates the decision record with the values that you defined on the Standard Offers page.

Free Format field and the Interview decision

For Interview decisions, the value you enter in the Free Format field need not start with *DDMMYY*. You can define interview standard offers with or without date and time elements. Note that the generated Transaction Code should not be blank for Interview decisions. You must enter text in either the Comment field or the Free Format field to generate transaction code.

If the Free Format field on the Standard Offers page starts with a date in the format DDMMYY, then the system populates the Interview Date field in the UCAS and GTTR Decision Processing and Initial Decision pages with this date. For example, suppose you have an *INT01* offer with a free format text that starts with *010100* on the Standard Offers page. In such a case, when you select *INT01* as a decision code on the UCAS Decision Processing page, the page automatically populates the Interview Date field as *01/01/2000*.

If the Free Format field on the Standard Offers page includes a time in the format HHMM from position 8 to 11 (that is, after a hyphen - as character 7), then the system populates the Interview Time field in the UCAS Decision Processing and UCAS Initial Decision pages with this time. For example, suppose you have an *INT01* offer with a free format text that starts with *010100-1300*. In such a case, when you select *INT01* as a decision code on the UCAS Decision Processing page, the page automatically populates the Interview Date field as *01/01/2000* and Interview Time as *13:00*. GTTR does not use Interview Time.

The system populates the Free Format field on the UCAS and GTTR Decision Processing pages with the Free Format value from the Standard Offers page without the interview date and time elements for UCAS and without the interview date for GTTR. For example, suppose you have an *INT01* offer with a free format text *010100-1300 Is your interview date and time*. In such a case, when you select *INT01* as a decision code on the UCAS Decision Processing page, the page automatically populates the Interview Date field with *01/01/2000*, Interview Time field with *13:00*, and the Free Format field with *Is your interview date and time*. The Free Format field does not appear on the Initial Decision pages but the system applies similar logic in the background to populate the Free Format field of the decision record with the free format text from the standard offer minus any interview date and time elements.

You can change the interview date and time, comment, and the free format text values on the decision pages, if required.

Reviewing Key UCAS Application Information

Access the UCAS Application Notes page (Student Admissions, UCAS Processing, UCAS Application Notes).

UCAS Application Notes		3C/Attachments	
Name:	Alberta Natashaia	ID:	1764
Academic Institution:	PSUNV PeopleSoft University	Date of Birth:	08/07/1979
UCAS Personal ID:	0035836353	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2011
Choice Details			
Choice Number:	1	Application Number:	00053396
UCAS Course Code:	B904	UCAS Campus:	*
Entry Year:	2011	Entry Month:	9
UCAS Decision:		Reply:	
		Maintain Applications	
		Choice Details	
		Entry Point: 1	
		Decision Entry	
Application Details			
Application Date: 25/06/2010		Disability: G You have a specific learning difficulty such as dyslexia, dyspraxia or AD(H)D	
Residential Category: 1 UK Citizen or EU National		Country of Birth: 000 United Kingdom	
Criminal Conviction: No		☒ Criminal Records Declared	
School: 00200 APPLY 2005, CHELTENHAM		Last School:	

UCAS Application Notes page (1 of 5)

Contextual Data

Find | View All | First | 1 of 1 | Last

School:

Timestamp:

School Year:

Percentage Achieving 5 GCSE:

Percentage Achieving 5 SCQF:

Best 8 GCSE Performance Score:

Best 8 SCQF Performance Score:

Average QCA per Qual/Entry:

Average Tariff per Qual/Entry:

Average QCA per Qual/Stdnt:

Average Tariff per Qual/Stdnt:

Percentage FSM Entitled:

Percentage FSM Registered:

Percentage EMA:

Qualifications

Customize | Find | | | First | 1-6 of 6 | Last

Qualification Details

Subject Details

Year	Month	Award Body	Type	Subject	Result
2009	5	AQA	General Certificate of Secondary Education	English	A
2009	5	AQA	General Certificate of Secondary Education	Mathematics	B
2009	5	AQA	General Certificate of Secondary Education	French	C
2011	2	AQA	GCE Advanced Level	Computer Studies	Incomplete
2011	2	AQA	GCE Advanced Level	Mathematics	Incomplete
2011	2	AQA	GCE Advanced Level	English	Incomplete

UCAS Application Notes page (2 of 5)

▼ Personal Statements

Find | View All First 1 of 1 Last

Statement:

Timestamp: 26/08/2010 12:00:00AM

It is a long standing ambition of mine to attend your prestigious institution to study Physics

UCAS Application Notes page (3 of 5)

▼ References

Find | View AllFirst1 of 1Last

Referee Type: PPrincipal Referee

Referee Name: Mr Manager

Referee Post: Manager

Estab Name: Acme

Predicted Grades:

A:Computer Studies = C A:Mathematics = B A:English = A

Statement:

This candidate is ideally suited to the course and is highly recommended

UCAS Application Notes page (4 of 5)

Telephone:	01234567890
Email:	test@ucas.ac.uk
Fax:	01234567890
Address Line 1:	Acme Towers
Address Line 2:	Acme Road
Address Line 3:	Acme
Address Line 4:	AA11 1AA
Postal Code:	
Quals Checked:	N
Full Time Count:	0
Part Time Count:	0
Timestamp:	26/08/2010 12:00:00AM

Notes		Find View All	First 1 of 1 Last
*Effective Date:	20/06/2011	*Effective Sequence:	1
*Notes:	The application is under consideration by the Admissions Tutor		
Action Required:	Institution	Outcome Code:	
User ID:	PSUK	Dockett,Darnell James	

UCAS Application Notes page (5 of 5)

The fields on the Notes region are similar to those on the UCAS Confirmation Enquiries page. The Automatic Save and Outcome Required settings on the UCAS Configuration page affects only the UCAS Confirmation Enquiries page and does not affect the UCAS Application Notes page.

Adding Attachments and Reviewing 3C Information for UCAS Application

Access the 3C/Attachments (Student Admissions, UCAS Processing, UCAS Application Notes, 3C/Attachments).

UCAS Application Notes

3C/Attachments

Name: Melissa Richards

ID: ADCRM1002

Date of Birth: 01/07/1986

Academic Institution: PSUNV

PeopleSoft University

UCAS Personal ID: 0035836353

[Personal Information](#)

[Applicant Summary](#)

Application Code: UC01

Application Year: 2011

Choice Details

Choice Number: 1

Application Number: 00024571

[Maintain Applications](#)

UCAS Course Code: LR21

UCAS Campus: *

[Choice Details](#)

Entry Year: 2011

Entry Month: 9

Entry Point: 1

UCAS Decision:

[Decision Entry](#)

Reply:

File Attachments

Customize

Find

View All

First

1 of 1

Last

Attachments

Audit

Attached File	View	Add Attachment	
	View	Add Attachment	

3C/Attachments page (1 of 3)

Checklists						
						
Status	Institution and Function					
Edit	View	Checklist	Item	Description	Due Date	Item Status
Edit	View	B	ENGPRO	English Proficiency	03/08/2006	Initiated
Edit	View	B	GRE	GRE Scores	03/08/2006	Initiated
Edit	View	B	GMAT	GMAT Scores	03/08/2006	Initiated
Edit	View	A	DEAN	Dean's Report	03/08/2012	Active
Edit	View	A	GMAT	GMAT Scores	03/08/2012	Active
Edit	View	A	APFEE	Application Fee	03/08/2012	Active
Edit	View	UGAPTR	RECLTR	Recommendation Letter	01/07/2007	Waived
Edit	View	UGAPTR	TRANS	Academic Transcripts	01/07/2007	Completed
Edit	View	UGAPTR	TRFSTM	Transfer Statement	01/07/2007	Initiated
Edit	View	UGAPST	ESSAY	Essay	09/02/2001	Waived
Edit	View	UGAPST	RECLTR	Recommendation Letter	09/02/2001	Waived
Edit	View	UGAPST	ACTSAT	ACT or SAT I Test Scores	09/02/2001	Completed
Edit	View	UGAPST	TRANS	Academic Transcripts	09/02/2001	Completed
Edit	View	ADPROM	APFEE	Application Fee	01/06/2010	Completed
Edit	View	ADPROM	FINSTA	Financial Statement	01/06/2010	Initiated
Edit	View	UGRALL	ACTSAT	ACT or SAT I Test Scores	01/07/2007	Completed
Edit	View	UGRALL	PERSTA	Personal Statement	01/07/2007	Completed
Edit	View	UGRALL	TRANS	Academic Transcripts	01/07/2007	Completed

3C/Attachments page (2 of 3)

Comments									
Comment Category		Comment ID							
Edit	View	Category	Description	Function	DateTime	Sequence			
Edit	View	BADO	Business Admissions - Open	ADMA	18/05/2011 7:11:16AM	10			
Edit	View	UADO	Undergraduate Admission-Open	ADMA	29/05/2009 10:19:12PM	6			
Edit	View	UADO	Undergraduate Admission-Open	ADMA	29/05/2009 10:12:42PM	5			
Edit	View	UADS	Undergrad Admission - Secure	ADMA	29/05/2009 10:11:18PM	4			
Edit	View	GEVL	Graduate Evaluations	ADMA	22/05/2009 3:37:29AM	3			
Edit	View	GADO	Graduate Admissions - Open	ADMA	22/05/2009 3:36:12AM	2			

Communications									
General Info		Letter Details							
Edit	View	Process Used	Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
Edit	View	Manual	Document		Incoming	ADMA	29/05/2009 10:04:16PM	21/05/2007	7
Edit	View	Manual	Letter	OFR	Outgoing	ADMP	29/05/2009 9:46:58PM	01/04/2007	4
Edit	View	Manual	Letter	F02	Outgoing	ADMA	22/05/2009 3:29:10AM	14/05/2007	3

3C/Attachments page (3 of 3)

File Attachments

Use this group box to add, delete and view attachments for the Campus Solutions application.

Add Attachment

Click to access standard PeopleTools functionality to browse to a file and upload it

View

Click the link to open the attachment in a new window.

The Audit tab displays all updates to attachments, including user name and date/time.

Note that you can also use the File Attachments group box on the Application Data page of the Maintain Applications component to maintain and access the attachment data.

The 3C Group Boxes (Checklists, Comments, and Communications)

The fields on these group boxes are similar to the fields that appear on the Campus Community's checklist, comment, and communication pages. The group boxes display the records in a similar way to the Campus Community's checklist, comment, and communication summary pages.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Managing Checklists

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Managing Comments

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Managing Communications

Note that the group boxes display a person ID's records for only the ADMA and ADMP administrative functions. Also, these records that the group boxes display are not restricted to records associated with the particular choice in context, *all* 3C records of the person for ADMA and ADMP are displayed.

When you create a checklist, comment, or communication record by clicking the create button on any one of these group boxes, the system by default:

- Enters the administrative function as *ADMA*.
- Enters the variable data based on the application choice (that is, academic career, student career Nbr, application number, and application center).

Deleting Incorrect UCAS Applicant Records

Access the UCAS Wrong Applicants page (Student Admissions, UCAS Processing, Remove Wrong Applicants, UCAS Wrong Applicants).

UCAS Wrong Applicants

Name:	Nathan Collins	ID:	6314	Date of Birth:	01/01/1986
Academic Institution:	PSUNV PeopleSoft University				
Personal Id:	1097000814			Personal Information	
Application Code:	UC01	Application Year:	2009	Applicant Summary	

Wrong Applicant Details

Status	Pending				
☒ Cancelled	Cancelled Date	30/07/08 12:00:00AM			
☒ Miscoded	☐ Joint Admission				
☐ Choice 1 Lost					
☐ Choice 2 Lost					
☐ Choice 3 Lost					
☐ Choice 4 Lost					
☐ Choice 5 Lost					
☐ Choice 6 Lost					
☐ Choice 7 Lost					
Remark	Cancelled				
Remove Applicant		No Action			

UCAS Wrong Applicants page

Remove Applicant

Click to delete the UCAS applicant record, UCAS applications of the applicant, and any corresponding non-matriculated Campus Solutions application records. The system enables this button if the status is *Pending*, *Partially Removed*, or *No Action*.

When you click the button for a UCAS applicant for whom only specific choices are lost, the system removes the specific lost choices but retains the overall applicant record.

No Action

Click to change the record status from *Pending* to *No Action*. The *No Action* status indicates that the record need not be removed.

After clicking the Remove Applicant button, navigate to Campus Community, Personal Information, ID Management, ID Delete to remove the person record of the UCAS wrong applicant.

Entering an Initial Admission Decision for a UCAS Application Choice

Access the UCAS Initial Decision Entry page (Student Admissions, UCAS Processing, UCAS Decision Processing, Initial Decision Entry).

UCAS Initial Decision Entry			
Name: Tyler Brown	ID: 6334	Date of Birth: 21/06/1986	
Academic Institution: PSUNV	PeopleSoft University		
UCAS Personal ID: 1097001822		Personal Information	
Application Code: UC01	Application Year: 2009	Applicant Summary	
Choice Details			
Choice Number: 3	Application Number: 00024766	Maintain Applications	
UCAS Course Code: G522 BSc/BIS	UCAS Campus: *	Choice Details	
Entry Year: 2009	Entry Month: 9	Entry Point: 1	
UCAS Decision:	Reply:		
Decision Details			
Institution Decision: A Accept	Decision Date Time: 23/07/09 11:19:06PM		
Decision Code:			
Decision Maker:	Comment:		
Approval Status: P Awaiting Approval			

UCAS Initial Decision Entry page

If you have not selected the Interview Applicants option on the UCAS Initial Decision Entry search page, the UCAS Initial Decision Entry page displays a record, only if the record does not have an institution decision and does not have a UCAS decision. In such a case, the UCAS Initial Decision Entry page does not allow you to modify an institution decision. If you want to modify an institution decision, use the UCAS Decision Processing page.

If you select the Interview Applicants option on the UCAS Initial Decision Entry search page, the UCAS Initial Decision Entry page displays a record, only if the record has an institution decision of Interview that is either approved or does not require approval and the UCAS decision value of the choice (imported from StarC/StarG) is not *W*. You can then use the UCAS Initial Decision Entry to modify the Interview decision to a post-interview decision (that is, Offer, Conditional offer, or Reject).

The UCAS Initial Decision Entry page does not allow you to access an application withdrawn at UCAS.

Institution Decision

Select an admission decision. After you enter a decision, run the Transaction Processing process to generate the transaction to send to UCAS.

If the choice number is 9 (Clearing), the valid decisions are *A* (Accept) or *R* (Rejection). If the choice number is 6 (Adjustment), the valid decision is *U* (Unconditional Offer). If the choice number is not 9 or 6 (standard application), the valid decisions are *C* (Conditional Offer), *U* (Unconditional Offer), *R* (Rejection), *F* (Course Full), and *I* (Interview).

The Interview Date and Interview Time fields appear only if you select the Interview decision.

You cannot enter the Delayed Conditional decision code (*D*) in this page or the GTTR Initial Decision Entry page. This decision can be entered only in the Decision Processing page.

Decision Code

Optionally, add a standard offer to the decision.

Interview Date

Select the date on which the interview is to take place.

Interview Time

Enter the time the interview is scheduled to begin. The time format uses a 24-hour clock. Therefore, for example, if the interview time is 2:30 PM, enter *14:30*.

Comment

For all decisions you can add a comment, unless a standard offer is entered.

You can enter the reason for a Clearing Rejection in the Comment field. When you generate a RX transaction for the rejection, the system includes the comment text in the Free Format column of the RX transaction.

Entering or Updating an Admission Decision for a UCAS Application Choice

Access the UCAS Decision Processing page (Student Admissions, UCAS Processing, UCAS Decision Processing, Decision Processing).

[New Window](#) | [Customize](#)

UCAS Decision Processing

Name: Nam Cicely **ID:** 0357 **Date of Birth:** 29/08/1979  

Academic Institution: PSGBR PeopleSoft University UK

UCAS Personal ID: 0035697369 [Personal Information](#) [Applicant Summary](#)

Application Code: UC01 **Application Year:** 2011

Choice Details

Choice Number: 1 **Application Number:** 00024813 [Maintain Applications](#)

UCAS Course Code: B120 BSc/Physio **UCAS Campus:** * [Choice Details](#)

Entry Year: 2011 **Entry Month:** 9 **Entry Point:** 1

UCAS Decision: **Reply:** [Application Notes](#)

Qualifications

[Customize](#) | [Find](#) |   First **1-6 of 6** Last

Qualification Details | **Subject Details** | 

Year	Month	Award Body	Type	Subject	Result
2009	5	AQA	General Certificate of Secondary Education	English	A
2009	5	AQA	General Certificate of Secondary Education	Mathematics	B
2009	5	AQA	General Certificate of Secondary Education	French	C
2011	2	AQA	GCE Advanced Level	Computer Studies	Incomplete
2011	2	AQA	GCE Advanced Level	Mathematics	Incomplete
2011	2	AQA	GCE Advanced Level	English	Incomplete

UCAS Decision Processing page (1 of 3)

Exam Results

[Customize](#) | [Find](#) |   First **1-3 of 3** Last

Result Details | **Subject Details** | 

Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
2011	8	IB		COMPUTER SC.	A		Unit Results
2011	8	OCR		MATHEMATICS	A	120	Unit Results
2011	8	OCR		ENGLISH LANG. and LIT (MODULAR)	A	120	Unit Results

Predicted Grades

Referee Name: Mr Manager

A:Computer Studies = C A:Mathematics = B A:English = A

UCAS Decision Processing page (2 of 3)

Decision Details

Find | View AllFirst1 of 1Last

*Institution Decision: Rejection

☐ Confirmation Decision

☐ Release to Clearing

Decision Date/Time: 20/05/11 3:34:26AM

Decision Maker:

Approval Status: P Awaiting Approval

Approver:

Course Change:

Campus Change:

Entry Year Change:

Entry Month Change:

Entry Point Change:

Decision Code:

Offer Details

Customize | Find | First1 of 1Last

Line Number	Abbrev	Grade / Mark	@ or /	Subject	End /	Text
1						

Comment:

Free Format:

Transaction Code:

Summary of Conditions: ☐ Manual Matching Required

Letter Text

UCAS Decision Processing page (3 of 3)

- Institution Decision

Select an admission decision. After you enter or update a decision, if required, use the UCAS Decision Approval page to approve the decision. Then use the Transaction Processing process to generate the decision transaction to send to UCAS.

The validations of this field are similar to that of the Institution Decision field on the UCAS Initial Decision Entry page. However, you can enter the Delayed Conditional (D) decision only from this page. Decision D is valid only for non-clearing CF application choices (CF means decision is *Conditional Offer* and reply is *Firm*).
- Confirmation Decision

The system automatically selects this check box when you enter a Confirmation decision in the UCAS Confirmation Entry page or the UCAS Quick Confirmation page.
- Release to Clearing

The system automatically selects this check box when you enter a Release into Clearing decision in the UCAS Release to Clearing page.
- Decision Code

Optionally, add a standard offer to the decision.

Comment

The usage of this field is similar to that of the Comment field on the UCAS Initial Decision Entry page. The only difference is that on this page you can use this field for transaction code. For example, if Interview Date is *May 26, 2009* and Interview Time is *9:15* and Comment is *Bring your portfolio* and you click Letter Text, then the following transaction code appears 260509-0915,'Bring your portfolio'

The offer details fields are similar to the fields on the Standard Offers page.

Entering a Decision for Multiple UCAS Application Choices

Access the UCAS Quick Decision Entry page (Student Admissions, UCAS Processing, UCAS Decision Processing, Quick Decision Entry).

Quick Decision Entry

*Academic Institution: PeopleSoft University ☐ Interview Applicants

UCAS Course:

UCAS Campus:

UCAS Entry Year:

Application Center:

Application Date:

Decision:

Decision Code:

Decision Maker:

Comment:

Decision Date/Time: 04/10/10 3:24:10AM

Approval Status:

UCAS Personal ID	UCAS Application Code	Application Date	Choice Number	Last Name	First Name	UCAS Course Code	Campus	Entry Year	Entry Month	Entry Point	Decision	Approval Status	Apply	Decision Processing
1 1081002001	UC01	25/10/2008	3	Pearce	Ben	C200	*	2011	9	1			Apply	Decision Processing
2 1081003301	UC01	25/10/2008	3	Pearce	Dominic	C200	*	2011	9	1			Apply	Decision Processing
3 1081004831	UC01	25/10/2008	3	Francis	Elaine	C200	*	2011	9	1			Apply	Decision Processing

UCAS Quick Decision Entry page

If you have not selected the Interview Applicants option on the UCAS Quick Decision Entry page, the search results can only display records that do not have a decision. In such a case, the page does not allow you to modify an admission decision. If you want to modify an admission decision, use the UCAS Decision Processing page.

If you select the Interview Applicants option on this page, the search results only display records that have a decision of Interview. You can then use this page to modify the Interview decision to a post-interview decision (that is, Offer, Conditional offer, or Reject).

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The decision, decision code, decision maker and comment field values are used for all the records that have a decision applied and are saved.

You cannot enter the Delayed Conditional decision code (D) in this page or the GTTR Quick Decision Entry page. This decision can be entered only in the Decision Processing page.

Approving or Rejecting a UCAS Decision

Access the UCAS Decision Approval page (Student Admissions, UCAS Processing, UCAS Decision Approval, Decision Approval).

UCAS Decision Approval			
Name:	Marinda Moira	ID:	2294
Date of Birth:	28/12/1981		
Academic Institution:	PSGBR PeopleSoft University UK		
UCAS Personal ID:	0035849203	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2011
Choice Details			
Choice Number:	9	Application Number:	00029947 Maintain Applications
UCAS Course Code:	W300 BMus/M	UCAS Campus:	* Choice Details
Entry Year:	2011	Entry Month:	9
UCAS Decision:		Entry Point:	1
		Reply:	Application Notes
Decision Details			
Institution Decision:	A Accept	Decision Maker:	
Decision Date/Time:	10/06/11 3:00:44PM		
Approval Status:	P Awaiting Approval	Approve	Deny
Approver:			
Course Change:		Campus Change:	
Entry Year Change:		Entry Month Change:	Entry Point Change:
Decision Code:			

UCAS Decision Approval page (1 of 2)

Offer Details	
Letter Text:	Eligible
Transaction Code:	'Eligible'
Summary of Conditions:	

UCAS Decision Approval page (2 of 2)

Click Approve or Deny button to indicate whether the admission decision entered in the UCAS Decision Processing or UCAS Initial Decision Entry page is approved or denied.

Approving or Rejecting Multiple UCAS Decisions

Access the UCAS Quick Decision Approval page (Student Admissions, UCAS Processing, UCAS Decision Approval, Quick Decision Approval).

Quick Decision Approval

***Academic Institution:** PeopleSoft University
UCAS Course:
UCAS Campus:
UCAS Entry Year:
Application Center:

Approver:

Customize Find View All First 16-19 of 19 Last															
	UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	UCAS Course Code	UCAS Campus	Entry Year	Entry Month	UCAS Entry Point	Decision	Approval Status	Approve	Deny	Decision Processing
16	1097001814	UC01	1	Collins	Nicholas	G522	*	2009	9	1	C	P	Approve	Deny	Decision Processing
17	1097001822	UC01	3	Brown	Tyler	G522	*	2009	9	1	C	P	Approve	Deny	Decision Processing
18	1097001877	UC01	3	Jefferys	William	G522	*	2009	9	1	F	P	Approve	Deny	Decision Processing
19	1097001899	UC01	3	Murphy	Ryan	G522	*	2009	9	1	I	P	Approve	Deny	Decision Processing

UCAS Quick Decision Approval page

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The Approver value is used for all the records that are approved and saved.

Determining Whether Applicants Satisfy the Offer Conditions

Access the Result/Offer Matching Process page (Student Admissions, UCAS Processing, UCAS Decision Processing, Result/Offer Matching Process).

Result/Offer Matching Process

Run Control ID: NG01 [Report Manager](#) [Process Monitor](#) [Run](#)

*Academic Institution: PeopleSoft University

UCAS Course Code:

Student Override

☒ **Student Override**
[Clear Data](#)

[Customize](#) | [Find](#) | [View All](#) |
First 1 of 1 Last

EmpID	Name		
1 6108	Black, Nicholas		

Result/Offer Matching Process page

Student Override

Select if you want to run the process for one or more IDs selected in the EmplID field.

If you select the Student Override check box, the process ignores any values entered in the UCAS Course Code field.

For a student, the process can compare the conditions you generated (Transaction Code) on the UCAS Decision Processing page with the exam results, and determine whether the student has satisfied the conditions. The process considers the following abbreviations when comparing conditional offer details with exam results:

- TO - Tariff offers
- GC - GCE A Level
- AS - GCE AS Level
- IH - Irish Leaving Certificate (Higher Level)
- SH - SQA Highers
- AH - SQA Advanced Highers
- EG - Excluding General Studies
- AC - Alternate conditions

Any other abbreviations need to be manually reviewed before the offer is confirmed.

After running this process, navigate to the UCAS Confirmation Entry page to check whether the applicant has satisfied the conditions. If the process determines that the applicant has satisfied all the conditions, the Results Matching field displays *Satisfied* on the UCAS Confirmation Entry page. If the process determines that at least one condition has not been met, the Results Matching field displays *Not Satisfied*. If the process determines that at least one condition has not been evaluated, the Results Matching field displays *Partially Evaluated*. If the process determines that none of the conditions have been evaluated, the Results Matching field displays *Not Evaluated*.

The following example shows how the Result/Offer Matching process works for a tariff offer:

1. Use the UCAS Decision Processing page to enter a conditional offer for a student.

Enter abbreviation = TO (Tariff Score) and Grade Mark = 200. This condition is generated: *The student must obtain a minimum of 200 UCAS tariff points.*

2. Import the exam results from ivStarPQR.

The student has grade C for GCE A Levels in Maths, General Studies, and English.

3. Run the Results/Offer Matching process for the student.

The system uses the imported cvRefTariff data to translate the total tariff score to 240 (grade C is equivalent to 80 tariff points).

4. The UCAS Confirmation Entry page for the student shows that the condition is satisfied.

Note. The Result/Offer Matching process considers only records that have a current decision of *C* or *D*, for which the Manual Matching Required check box is cleared on the UCAS Decision Processing page.

Entering or Updating a UCAS Confirmation Decision

Access the UCAS Confirmation Entry page (Student Admissions, UCAS Processing, UCAS Decision Processing, Confirmation Entry).

UCAS Confirmation Entry

Name: Hilario Val

ID: 2480

Date of Birth: 28/06/1975

Academic Institution: PSGBR PeopleSoft University UK

UCAS Personal ID: 0036803473 [Personal Information](#) [Applicant Summary](#)

Application Code: UC01 **Application Year:** 2011

Choice Details

Choice Number:	3	Application Number:	00027421	Maintain Applications
UCAS Course Code:	F100 BSc/Chem	UCAS Campus:	*	Choice Details
Entry Year:	2011	Entry Month:	9	Entry Point: 1
UCAS Decision:	Conditional Offer	Reply:	Firm Acceptance	Application Notes

Decision Confirmation

Institution Decision: C Conditional Offer

Decision Date/Time: 04/01/2012 3:38:46AM

Approval Status: N Not Required

Course Change:

Entry Year Change:

Results Matching: Not Satisfied

Decision Maker:

Approver:

Campus Change:

Entry Month Change:

Entry Point Change:

UCAS Confirmation Entry page (1 of 3)

Exam Results

Personalize | Find | View All |  

First 1-4 of 4 Last

Result Details

Subject Details



Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
2011	8	OCR	A LEVEL	MATHEMATICS	A	120	Unit Results
2011	8	OCR	A LEVEL	GENERAL STUDIES	B	100	Unit Results
2011	8	OCR	A LEVEL	MUSIC	B	100	Unit Results
2011	8	OCR	A LEVEL	PSYCHOLOGY	B	100	Unit Results

Letter Text

Transaction Code:

.GC,A@MATHS,.GC,A@PSYCH,.GC,A@MUSIC

Summary of Conditions:

Letter Text:

GCE A level

Grade A in Mathematics

GCE A level

Grade A in Psychology

GCE A level

Grade A in Music

UCAS Confirmation Entry page (2 of 3)

Results Matching

☐ Manual Matching Required

Line Number	Transaction Code	Result Matching Text
1	.GC,A@MATHS	SATISFIED
2	.GC,A@PSYCH	NOT SATISFIED
3	.GC,A@MUSIC	NOT SATISFIED

UCAS Confirmation Entry page (3 of 3)

Click the Accept or Reject button to indicate the Confirmation decision.

To add any changes to the course details, first enter the changes, then click the Accept button, and finally save the record. For example, enter a Campus Change value, click the Accept button, and then save the record.

Note that if you decide to save the record without clicking either the Accept button or Reject button, then the system removes any course change details in the existing non-confirmation decision record.

All application records that are CF or CI (decision is conditional offer, and reply is firm or insurance) appear on the UCAS Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. Additionally, any application records that are DF (decision is delayed conditional and reply is firm) appear on the UCAS Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. You can enter or amend a confirmation decision using this page.

The system automatically selects the Confirmation Decision check box on the UCAS Decision Processing page when you click Accept or Reject.

After you enter a Confirmation decision, if required, use the Confirmation Approval page to approve the decision. Then run the Transaction Processing process to generate the RD transaction to send to UCAS.

If you amend an existing confirmation decision using this page, in most cases, the Transaction Processing process generates another RD transaction with the new Accept or Reject decision. However, in cases where you have already sent an accept decision and a course change is being made, then the process generates a RA transaction.

If the Entry Point is being changed to a foundation year with Entry Point of zero, you must enter 9 in the Entry Point Change field of this page. The system will send this value to UCAS in the confirmation transaction as zero when you run the Transaction Processing process.

Entering Multiple UCAS Confirmation Decisions

Access the UCAS Quick Confirmation page (Student Admissions, UCAS Processing, UCAS Decision Processing, Quick Confirmation).

UCAS Quick Confirmation

'Academic Institution' PeopleSoft University

UCAS Course

UCAS Campus

UCAS Entry Year Reply Firm

Application Center [Search Decisions](#)

Decision Maker Decision Date 03/06/09

	UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	Course Change	Campus Change	Entry Year Change	Fulfilment Condition	Accept	Reject	Decision	Reply	Confirmation Details
1	1090000062	UC01	3	Parsons	Tyler					Accept	Reject	C	F	Confirmation Details
2	1097001730	UC01	71	Sharp	Donna					Accept	Reject	C	F	Confirmation Details

UCAS Quick Confirmation page

The same rules discussed in the Entering a Confirmation Decision topic in this chapter apply to the UCAS Quick Confirmation page. However, there are two exceptions:

- The Quick Confirmation page does not display a DF application choice.
- The Quick Confirmation page does not display an application choice for which you already have entered a confirmation decision.

You can search for records of a particular course. Also, you can use the same Decision Maker value for all the records that appear in the search results.

When you click Accept or Reject, the system automatically updates the Decision value to A or R, respectively.

Approving or Rejecting a UCAS Confirmation Decision

Access the UCAS Confirmation Approval page (Student Admissions, UCAS Processing, UCAS Decision Approval, Confirmation Approval).

UCAS Confirmation Approval

Name: Emile Alleen

ID: 3643

Date of Birth: 05/10/1990

Academic Institution: PSGBR

PeopleSoft University UK

UCAS Personal ID: 0043279412

[Personal Information](#)

[Applicant Summary](#)

Application Code: UC01

Application Year: 2012

Choice Details

Choice Number: 2

Application Number: 00030331

[Maintain Applications](#)

UCAS Course Code: B904 MA/HS

UCAS Campus: *

[Choice Details](#)

Entry Year: 2012

Entry Month: 9

Entry Point: 1

UCAS Decision: Unconditional Offer

Reply: Firm Acceptance

[Application Notes](#)

Decision Confirmation

Institution Decision: A Accept

Approve

Deny

Decision Date/Time: 10/06/11 4:01:15PM

Decision Maker:

Approval Status: P Awaiting Approval

Approver:

Course Change:

Campus Change:

Entry Year Change:

Entry Month Change:

Entry Point Change:

Fulfilment Condition:

UCAS Confirmation Approval page (1 of 2)

▼ Exam Results

Customize | Find | View All | First 1 of 1 Last

Result Details

Subject Details

Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results
							Unit Results

▼ Letter Text

Transaction Code:

.GC,BECON,.GC,BBIOL,.GC,BCHE
M

Summary of Conditions:

Letter Text:

GCE A level

Grade B Economics

GCE A level

Grade B Biology

GCE A level

Grade B Chemistry

▼ Results Matching

☐ Manual Matching Required

Line Number	Transaction Code	Result Matching Text
1		

UCAS Confirmation Approval page (2 of 2)

Approving or Rejecting Multiple UCAS Confirmation Decisions

Access the UCAS Quick Confirmation Approval page (Student Admissions, UCAS Processing, UCAS Decision Approval, Quick Confirmation Approval).

Quick Confirmation Approval

*Academic Institution

PSUNV

PeopleSoft University

UCAS Course

G522

Open

UCAS Campus

*

UCAS Entry Year

Application Center

UGRD

Search Decisions

Approver

0035

Robert Matthews

	UCAS Personal ID	UCAS Application Code	Choice Number	Last Name	First Name	Course Change	Campus Change	Entry Year Change	Fulfillment Condition	Decision	Approve	Deny	Approval Status	Description	Confirmation Details
1	1097000844	UC01	3	Green	Ryan				N	A	Approve	Deny	P	Awaiting Approval	Confirmation Details
2	1097001814	UC01	1	Collins	Nicholas					A	Approve	Deny	P	Awaiting Approval	Confirmation Details

UCAS Quick Confirmation Approval page

You can search for records of a particular institution, course, campus, entry year and application center or combination of those. The Approver value is used for all the records that are approved and saved.

Entering a Decision to Release an Applicant into Clearing

Access the UCAS Release to Clearing page (Student Admissions, UCAS Processing, UCAS Decision Processing, Release to Clearing).

UCAS Release to Clearing			
Name:	Alla Melvin	ID:	1993
Academic Institution:	PSGBR PeopleSoft University UK	Date of Birth:	17/11/1981
UCAS Personal ID:	0035837136	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2011
Choice Details			
Choice Number:	1	Application Number:	00024842
UCAS Course Code:	B904 MA/HS	UCAS Campus:	*
Entry Year:	2011	Entry Month:	9
UCAS Decision:	Unconditional Offer	Reply:	Firm Acceptance
			Maintain Applications
			Choice Details
			Application Notes
Release to Clearing			
Institution Decision:	U Unconditional Offer	Release to Clearing	
Decision Date/Time:	10/06/11 3:02:52PM	Decision Maker:	
Approval Status:	N Not Required	Approver:	
Release Reason:			

UCAS Release to Clearing page

The page displays:

- Application choices that have a Institution Decision of *U* (Unconditional), Reply of *F* (Firm), and the Release to Clearing check box cleared on the Decision Processing page.
- All accepted Clearing and Adjustment application choices (that is, application choice number is 6 or 9, decision is *A* or *U*, and Reply is not equal to *D* (declined)).

The system automatically selects the Released to Clearing check box on the UCAS Decision Processing page when you click Release to Clearing.

After you enter a decision to release an applicant into Clearing, if required, use the Release to Clearing Approval page to approve the decision. Then run the Transaction Processing process to generate the RR transaction to send to UCAS.

Note. The system displays a warning message if the applicant is not eligible for release to Clearing. That is, when you click the Release to Clearing button, a warning message appears if the application is for deferred entry, if the application is for a future or previous cycle, if the application is RPA (Record of Prior Acceptance), or if the application Fee Level is single fee.

Approving or Rejecting the Release into Clearing Decision

Access the UCAS Release Approval page (Student Admissions, UCAS Processing, UCAS Decision Approval, Release to Clearing Approval).

UCAS Release Approval			
Name:	Alla Melvin	ID:	1993
Academic Institution:	PSGBR PeopleSoft University UK	Date of Birth:	17/11/1981
UCAS Personal ID:	0035837136	Personal Information	Applicant Summary
Application Code:	UC01	Application Year:	2011
Choice Details			
Choice Number:	1	Application Number:	00024842
UCAS Course Code:	B904 MA/HS	UCAS Campus:	*
Entry Year:	2011	Entry Month:	9
UCAS Decision:	Unconditional Offer	Reply:	Firm Acceptance
			Maintain Applications
			Choice Details
			Entry Point: 1
			Application Notes
Release to Clearing			
Institution Decision:	W Withdrawal	Approve	Deny
Decision Date/Time:	10/06/11 3:30:12PM	Decision Maker:	
Approval Status:	P Awaiting Approval	Approver:	
Release Reason:	R1 Financial hardship		

UCAS Release Approval page

Entering UCAS Clearing or Adjustment Details

To search for only adjustment records, select the Adjustment check box on the search page. To search for only Clearing records, clear the Adjustment check box on the search page.

Access the UCAS Enquiry Entry page (Student Admissions, UCAS Processing, UCAS Decision Processing, Enquiry Entry).

UCAS Enquiry Entry

Academic Institution: PSUNV PeopleSoft University

Enquiry ID: 5 ☐ Adjustment

Personal ID: 1080000213 *Application Year: 2010

Application Code: UC01

*Surname: Miller Title: Ms

*Forenames: Elaine

Date of Birth: 01/01/1986 Gender: Female

UCAS Course Code: C500 Microbiology UCAS Campus: *

UCAS Entry Year: 2010 UCAS Entry Month: 9

UCAS Entry Point: 1 CEF Number:

Transaction Type: RX Clearing Decision [UCAS Application Summary](#)

Decision: R Rejection

Decision Maker: Decision Date/Time:

UCAS Enquiry Entry page (1 of 2)

Exam Results

Customize | Find | View All | First 1-2 of 2 Last

	Qualification Year	Qualification Month	Qualification Type	Award Body	Subject Code	*Subject Title	*Result		
1	2010	7	A	C	ART	Art	D		
2	2010	7	A	C	BIOL	Biology	B		

Notes

Notes:

UCAS Enquiry Entry page (2 of 2)

Use the Transaction Type field to record an RQ, PE, or RX transaction for a Clearing enquiry or the RQ, PE, or AD transaction for an Adjustment enquiry. Use the Decision field to enter A (Accept) or R (Reject). After you record the Clearing or Adjustment details, run the Transaction Processing process to generate the Adjustment or Clearing transactions to send to UCAS.

If you want to record a PE transaction, the UCAS Personal ID and UCAS Application Code fields are required (UCAS Course Code is optional).

If you want to record a AD transaction, the UCAS Personal ID, UCAS Application Code, UCAS Course Code, Entry Year, and Entry Month fields are required.

The UCAS Course Code field is required for RQ and RX transactions. Also, the Decision field is required for RX transaction.

Reviewing and Updating UCAS Qualifications

Access the UCAS Qualifications page (Student Admissions, UCAS Processing, UCAS Decision Processing, Qualifications)

UCAS Qualifications

Name: Nam Cicely **ID:** 0357 **Date of Birth:** 29/08/1979
Academic Institution: PSGBR PeopleSoft University UK
Personal ID: 0035697369 [Personal Information](#) [Applicant Summary](#)
Application Code: UC01 **Application Year:** 2011

Qualifications							Customize	Find	First	1-6 of 6	Last
Year	Month	Award Body	Type	Subject	Result						
2009	5	AQA	General Certificate of Secondary Education	English	A		+	-			
2009	5	AQA	General Certificate of Secondary Education	Mathematics	B		+	-			
2009	5	AQA	General Certificate of Secondary Education	French	C		+	-			
2011	2	AQA	GCE Advanced Level	Computer Studies	Incomplete		+	-			
2011	2	AQA	GCE Advanced Level	Mathematics	Incomplete		+	-			
2011	2	AQA	GCE Advanced Level	English	Incomplete		+	-			

Exam Results								Customize	Find	First	1-3 of 3	Last
Year	Month	Award Body	Type	Subject	Result	Tariff Score	Unit Results					
2011	8	IB		COMPUTER SC.	A		Unit Results					
2011	8	OCR		MATHEMATICS	A	120	Unit Results					
2011	8	OCR		ENGLISH LANG. and LIT (MODULAR)	A	120	Unit Results					

UCAS Qualifications page

Generating, Exporting, and Updating UCAS and GTTR Transactions

Access the Transaction Processing page (Student Admissions, UCAS Processing, Transaction Processing, Transaction Processing).

Transaction Processing

Run Control ID: NG

[Report Manager](#) [Process Monitor](#) Run

*Academic Institution:

PSUNV

PeopleSoft University

UCAS

☒ Generate Transactions

☐ Export Transactions to UCAS

☐ Update Transactions from UCAS

GTTR

☒ Generate Transactions

☐ Export Transactions to GTTR

☐ Update Transactions from GTTR

Transaction Processing page

Use the check boxes in the UCAS and GTTR regions to generate, export, and update UCAS and GTTR transactions.

- Generate Transactions**

Select to generate transactions and update the corresponding Campus Solutions application choice records.
- Export Transactions to UCAS**

Select to write the transactions to the TRANIN table at UCAS.
- Update Transactions from UCAS**

Select to enable the Campus Solutions system to read back error codes from TRANIN at UCAS.

The system disables the GTTR check boxes on the Transaction Processing page if you clear the GTTR check box on the UCAS Configuration page.

Reviewing UCAS Transactions

Access the UCAS Transactions page (Student Admissions, UCAS Processing, Transaction Processing, UCAS Transactions).

UCAS Transactions

Name: Alberta Natashaia **ID:** 1764 **Date of Birth:** 08/07/1979  

Academic Institution: PSGBR PeopleSoft University UK

UCAS Personal ID: 0035836353 [Personal Information](#) [Applicant Summary](#)

Application Code: UC01 **Application Year:** 2011

Choice Details

Choice Number: 1	Application Number: 00024814	Maintain Applications
UCAS Course Code: B904 MA/HS	UCAS Campus: *	Choice Details
Entry Year: 2011	Entry Month: 9	Entry Point: 1
UCAS Decision:	Reply:	Application Notes

▼ Decision Details

Institution Decision: U Unconditional Offer	Decision Maker:
Decision Date/Time: 20/05/11 3:35:34AM	
Approval Status: N Not Required	Approver:
Course Change:	Campus Change:
Entry Year Change:	Entry Month Change:
	Entry Point Change:
Decision Code:	

UCAS Transactions page (1 of 2)

Transaction Details

Find | View All First  1 of 1  Last

Transaction Type: LD Decision	Transaction ID: 1	 
Error Code: 100 Transaction Code Invalid	Error Position:	
Decision: U Unconditional Offer	Created Date: 20/05/11 3:36:44AM	
Course:	Campus:	
Entry Year:	Entry Month:	Entry Point:
Transaction Code:	☒ Auto ☒ Sent ☐ Hold ☐ Obsolete	
Summary of Conditions:		

UCAS Transactions page (2 of 2)

You cannot update transactions that the system has already sent to UCAS. The transaction appears in read-only mode if the system has already sent the transaction to UCAS. If the system has not sent the transaction, you can use this page to update, delete, or hold the transaction.

Error Code	Displays the status of a transaction that UCAS sends back to the institution. You import the error codes, descriptions, and error positions from cvRefError view when you import the reference data. An error code of: • -1 indicates that UCAS has not yet processed the transaction. • 0 indicates that UCAS has successfully processed the transaction.
Error Position	Indicates where the error appears in the transaction code.
Decision	Select a decision for the transaction of an application choice.
Transaction Code	Enter the transaction code that you want to send to UCAS.
Auto	Indicates that the system has automatically generated the transaction.
Sent	Indicates that the system has sent the transaction to UCAS.
Hold	Select to indicate that you do not want the system to export the transaction to UCAS.
Obsolete	Select if you do not want the transaction to appear in the search results when you search for error, hold, or unsent transactions. Note that you can select the Transactions in Error check box, Transaction on Hold check box, or Unsent Transaction check box on the UCAS Transactions search page to search for error, hold, or unsent transactions. Also, if you select the Obsolete check box, the system does not export the transaction to UCAS. Hold or obsolete transactions cannot be sent to UCAS.

The following table lists the field values that are mandatory when you create a transaction manually. If you create a transaction manually, you will need to manually update the related Campus Solutions application record.

<i>Transaction Type</i>	<i>Mandatory Field Value</i>
LD (decision)	Decision
LA (amended decision)	
RD (confirmation decision)	

Transaction Type	Mandatory Field Value
LC (course correction)	At least one of the following values must be provided: • Course • Campus • Entry Year • Entry Month • Entry Point
RR (release into clearing)	Transaction Code must contain a value ranging from <i>.R1</i> to <i>.R8</i> .
PE, RA, or RW	None
RA, RR, and RW	Application must be UF. That is, Decision must be <i>U</i> (Unconditional Offer) and Reply must be <i>F</i> (Firm).

Use the UCAS Enquiry Transactions page to manually create an RX or RQ transaction.

Reviewing UCAS Clearing and Adjustment Transactions

To search for only adjustment transactions, select the Adjustment check box on the search page. To search for only Clearing transactions, clear the Adjustment check box on the search page.

Access the UCAS Enquiry Transactions page (Student Admissions, UCAS Processing, Transaction Processing, UCAS Enquiry Transactions).

[New window](#) | [Customize](#)

UCAS Enquiry Transactions

Name: Andrew-60010002 West6 **Date of Birth:** 23/12/1969

Academic Institution: PSUNV PeopleSoft University **Enquiry ID:** 2

Personal ID: 0035836353 **Application Code:** UC01

UCAS Course Code: **UCAS Campus:** [Clearing Entry](#) ☐ Adjustment

UCAS Entry Year: 2012 **UCAS Entry Month:** **UCAS Entry Point:**

Transaction Details [Find](#) | [View All](#) First **1 of 1** Last

***Transaction Type:**

Transaction ID:

Error Code: -1

Error Position:

Decision:

Created Date: 06/06/11 4:57:01PM ☐ Auto

Course:

Campus:

☐ Sent

Entry Year:

Entry Month:

Entry Point:

☒ Hold

☐ Obsolete

UCAS Enquiry Transactions page

Most of the fields on the UCAS Enquiry Transactions page are similar to those on the UCAS Transactions page.

Handling UCAS Applicant Enquiries

Access the UCAS Confirmation Enquiries page (Student Admissions, UCAS Processing, UCAS Confirmation Enquiries).

UCAS Confirmation Enquiries

Name: Francesca Turvey		ID: 0091	Date of Birth: 01/01/1986
Academic Institution: PSUNV PeopleSoft University		Personal Information	
Personal ID: 1081001291	Application Code: UC01	Application Year: 2010	

Choice Details			
Choice Number: 3	Effective Date: 25/03/2011	Applicant Summary	
UCAS Course: C200 BSc/Bot	UCAS Campus: *	Faculty: C	
Entry Year: 2011	Entry Month: 9	Entry Point: 1	
Previous Course:	Previous Campus:		
Adjustment Status:	Residency: HOME Home/United Kingdom		
Decision: Unconditional Offer	Decision Date/Time: 05/07/2010 10:22:09AM		
Reply: Firm Acceptance	Summary Condition: SOC		
Application Number: 00024828			
Program Action: ADMT Admit	Action Reason: CONF Offer Conditions Met (UF)		
Description:	The applicant has met the conditions of our offer.		
Script Text:	Congratulations on your examination results. I'm pleased to confirm that you have been accepted by PeopleSoft University. You can view the decision on UCAS Track and will receive your AS12 letter shortly. You can confirm your intention to attend by visiting the Peoplesoft University website.		
Application Center: UGRD Undergraduate			
Telephone Contact 1: 01273 345 500 extension 112233	Telephone Contact 2: 01273 345 699 extension 324324		

UCAS Confirmation Enquiries page (1 of 2)

Notes		Find View All	First 1 of 2 Last
*Effective Date:	27/03/2011	*Effective Sequence:	1
*Notes:			
Action Required:	▼	Outcome Code:	🔍
User ID:	SATRN11		
▶ Other Choices			
▶ Qualifications			
▶ Exam Results			

UCAS Confirmation Enquiries page (2 of 2)

The page displays all UCAS application choices (similar to the UCAS Applications component). There is no restriction to just Confirmation and Clearing application choices. You can add multiple notes records for an effective date.

Notes	Enter the details of the interaction with the applicant.
Action Required	Select a value to filter the codes available on the Outcome Code field.
Outcome Code	Select a code to categorize the interaction with the applicant.

Note. If you have configured Automatic Save, the system automatically saves a new record when you enter the mandatory values. The Notes field is always mandatory. The Action Required and Outcome Code fields become mandatory, if Outcome Required is configured as mandatory.

You configure Automatic Save and Outcome Required on the UCAS Configuration page.

Reviewing Key GTTR Application Information

Access the GTTR Application Notes page (Student Admissions, UCAS Processing, GTTR Application Notes).

[New Window](#) | [Custom](#)

GTTR Application Notes		3C/Attachments	

Name: Alexandria Thomas	ID: ADCRM1004	Date of Birth: 23/09/1992
Academic Institution: PSUNV PeopleSoft University		
GTTR Personal ID: 1081202108	Personal Information	Applicant Summary
Application Code: GT01	Application Year: 2010	

Choice Details			
Round Number: 2	☐ Clearing	Application Number: 00024576	Maintain Applications
GTTR Course: GT12		Campus: *	Choice Details
Entry Year: 2010		Entry Month: 9	Decision Entry
GTTR Decision:		Reply: Firm Acceptance	
Modular:		Part Time: F	

Application Details		Find View All	First	1 of 1	Last
Application Date: 12/10/2009	Disability Code: B	You have a social/communication impairment such as Aspergers syndrome/other autistic spectrum disorder			
Residential Category: B UK Resident	Country of Birth: 000	United Kingdom			
Criminal Conviction: No	☐ Criminal Records Declared				

Qualifications

GTTR Application Notes page (1 of 2)

▼ Degree Details

Find | View All

First 1 of 1 Last

Degree Institution:

Degree Title:

Degree Status:

Degree Result:

Completion Year:Completion Month:

Degree Subject:

▶ Personal Statements

▶ References

Notes

Find | View All

First 1 of 1 Last

*Effective Date:06/06/2011

*Effective Sequence:1

*Notes:

Action Required:

Outcome Code:

User ID:SATRN11

GTTR Application Notes page (2 of 2)

Most of the fields on this page are similar to those on the UCAS Application Notes page. The GTTR Application Notes page has a Degree Details region that is not applicable to UCAS.

Adding Attachments and Reviewing 3C Information for GTTR Application

Access the 3C/Attachments (Student Admissions, UCAS Processing, GTTR Application Notes, 3C/Attachments).

[New window](#) | [Customize](#)

GTTR Application Notes | **3C/Attachments**

Name: Alexandria Thomas **ID:** ADCRM1004 **Date of Birth:** 23/09/1992

Academic Institution: PSUNV PeopleSoft University

GTTR Personal ID: 1081202108 [Personal Information](#) [Applicant Summary](#)

Application Code: GT01 **Application Year:** 2010

Choice Details

Round Number: 2 ☐ Clearing **Application Number:** 00024576 [Maintain Applications](#)

GTTR Course: GT12 **Campus:** * [Choice Details](#)

Entry Year: 2010 **Entry Month:** 9 [Decision Entry](#)

GTTR Decision: **Reply:** Firm Acceptance

Modular: **Part Time:** F

File Attachments [Customize](#) | [Find](#) | [View All](#) | | First **1 of 1** Last

Attachments | **Audit**

Attached File	View	Add Attachment
	View	Add Attachment

Checklists

Status | **Institution and Function** |

Edit	View	Checklist	Item	Description	Due Date	Item Status
Edit	View					

3C/Attachments page (1 of 2)

Comments

Comment Category | **Comment ID** |

Edit	View	Category	Description	Function	DateTime	Sequence
Edit	View	UADS	Undergrad Admission - Secure	ADMA	30/05/2009 9:46:17PM	2

Communications

General Info | **Letter Details** |

Edit	View	Process Used	Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
Edit	View	Manual	Letter	F03	Outgoing	ADMP	30/05/2009 9:39:39PM	13/06/2008	2

3C/Attachments page (2 of 2)

The fields on this page are similar to those on the 3C/Attachments page for UCAS.

Deleting Incorrect GTTR Applicant Records

Access the GTTR Wrong Applicants page (Student Admissions, UCAS Processing, Remove Wrong Applicants, GTTR Wrong Applicants).

GTTR Wrong Applicants

Name: Dorothy Collins

ID: 6305

Date of Birth: 01/01/1986

Academic Institution: PSUNV PeopleSoft University

Personal Id: 2097000214 [Personal Information](#)

Application Code: GT01 **Application Year:** 2010 [Applicant Summary](#)

Wrong Applicant Details

Status

Pending

☒ **Cancelled**

Cancelled Date 30/07/08 12:00:00AM

☒ **Miscoded**

Remark

Cancelled

Remove Applicant

No Action

GTTR Wrong Applicants page

The fields on this page are similar to those on the UCAS Wrong Applicants page.

Entering an Initial Admission Decision for a GTTR Application Choice

Access the GTTR Initial Decision Entry page (Student Admissions, UCAS Processing, GTTR Decision Processing, Initial Decision Entry).

GTTR Initial Decision Entry

Name: Max Carley

Academic Institution: PSGBR PeopleSoft University UK

GTTR Personal ID: 1000031397

Application Code: GT01

ID: 3288

[Personal Information](#)

Application Year: 2011

Date of Birth: 18/07/1984

[Applicant Summary](#)

Choice Details

Round Number: 2 ☐ Clearing

GTTR Course: F1X1 Chemistry

Entry Year: 2011

GTTR Decision:

Modular:

Application Number: 00029994

Campus: *

Entry Month: 8

Reply:

Part Time: F

[Maintain Applications](#)

[Choice Details](#)

[Application Notes](#)

Decision Details

*Institution Decision: Unconditional Offer

Decision Code:

Comment:

Decision Maker:

Approval Status: N Not Required

Decision Date/Time: 10/06/11 4:21:04PM

GTTR Initial Decision Entry page

The fields on this page are similar to those on the UCAS Initial Decision Entry page. Note that the GTTR Initial Decision Entry page does not display Accepted clearing choices that have a Choice Number of 99 and Decision of U.

Entering or Updating an Admission Decision for a GTTR Application Choice

Access the GTTR Decision Processing page (Student Admissions, UCAS Processing, GTTR Decision Processing, Decision Processing).

GTTR Decision Processing

Name: Albina Oscar **ID:** 3285 **Date of Birth:** 14/03/1983
Academic Institution: PSGBR PeopleSoft University UK
GTTR Personal ID: 1000031452 [Personal Information](#) [Applicant Summary](#)
Application Code: GT01 **Application Year:** 2011

Choice Details

Round Number: 2	☐ Clearing	Application Number: 00029996	Maintain Applications
GTTR Course: D6X1 Home Economics		Campus: *	Choice Details
Entry Year: 2011		Entry Month: 8	Application Notes
GTTR Decision:		Reply:	
Modular:		Part Time: F	

Qualifications

Customize | Find | First 1-4 of 4 Last

Year	Month	Award Body	Type	Subject	Result
2000	6	AQA	General Certificate of Secondary Education	English	A*
2000	6	AQA	General Certificate of Secondary Education	Maths	A
2000	6	AQA	General Certificate of Secondary Education	Science	B
2000			Advanced Higher Courses	Biology C007	C

Degree Details

Find | View All First 1 of 1 Last

Degree Institution:	University of UCAS		
Degree Title:	BSC		
Degree Status:	H		
Degree Result:			
Completion Year:	2009	Completion Month:	9
Degree Subject:	General Studies		

GTTR Decision Processing page (1 of 2)

Decision Details

Find | View All First 1 of 1 Last

*Institution Decision: ☐

Decision Date/Time: 10/06/11 4:25:31PM

Approval Status:

Course Change: ☐

Modular Change: ☐

Entry Month Change: ☐

Decision Code:

☐ Confirmation Decision

Decision Maker:

Approver:

Campus Change: ☐

Entry Year Change:

Part-Time Change: ☐

Offer Details

Customize | Find | First 1 of 1 Last

Line Number	Abbrev	Grade / Mark	@ or /	Subject	End /	Text		
1							+	-

Comment:

Free Format:

Transaction Code:

Letter Text

GTTR Decision Processing page (2 of 2)

Most of the fields on this page are similar to the UCAS Decision Processing page. However, this page has a Clearing check box that does not appear on the UCAS Decision Processing page. The system selects the Clearing check box if ClearingStatus from ivgStarK is 2 (under consideration by institution) or 3 (accepted in clearing) and the ivgStarG Round Number is equal to or greater than the ivgStarK Round Number.

Entering a Decision for Multiple GTTR Application Choices

Access the GTTR Quick Decision Entry page (Student Admissions, UCAS Processing, GTTR Decision Processing, Quick Decision Entry).

Quick Decision Entry

*Academic Institution:

PSUNV

PeopleSoft University

GTTR Course:

GTTR Campus:

GTTR Entry Year:

Application Center:

Application Date:

12/10/2009

Search

☐ Interview Applicants

Decision:

☐

Decision Code:

Decision Maker:

Comment:

Decision Date/Time:

05/10/10 12:36:38AM

Approval Status:

Customize Find View All First 1-26 of 26 Last														
	GTTR Personal ID	GTTR Application Code	Application Date	Round Number	Last Name	First Name	GTTR Course Code	GTTR Campus	Entry Year	Entry Month	Institution Decision	Approval Status	Apply	Decision Processing
1	2097001655	GT01	12/10/2009	1	Meade	Christopher	GT12	*	2011	9			Apply	Decision Processing
2	2087000351	GT01	12/10/2009	1	Sykes	Greg	GT12	*	2011	9			Apply	Decision Processing

GTTR Quick Decision Entry page

The fields on this page are similar to those on the UCAS Quick Decision Entry page.

Approving or Rejecting a GTTR Decision

Access the GTTR Decision Approval page (Student Admissions, UCAS Processing, GTTR Decision Approval, Decision Approval).

GTTR Decision Approval			
Name:	Jame Jeanne	ID:	3279
Academic Institution:	PSGBR	PeopleSoft University UK	Date of Birth:
GTTR Personal ID:	1000031407	Personal Information	Applicant Summary
Application Code:	GT01	Application Year:	2011
Choice Details			
Round Number:	2	☐ Clearing	Application Number:
GTTR Course:	D6X1	Home Economics	Campus:
Entry Year:	2011	Entry Month:	8
GTTR Decision:		Reply:	
Modular:		Part Time:	F
Decision Details			
Institution Decision:	R	Rejection	Decision Maker:
Decision Date/Time:	10/06/11 4:24:04PM		
Approval Status:	P	Awaiting Approval	Approve Deny Pending
Approver:			
Course Change:		Campus Change:	Modular Change:
Entry Year Change:		Entry Month Change:	Part-Time Change:
Decision Code:			

GTTR Decision Approval page (1 of 2)

Offer Details	
Letter Text:	
Transaction Code:	

GTTR Decision Approval page (2 of 2)

Click Approve or Deny button to indicate whether the admission decision entered in the GTTR Decision Processing or GTTR Initial Decision Entry page is approved or denied.

Approving or Rejecting Multiple GTTR Decisions

Access the GTTR Quick Decision Approval page (Student Admissions, UCAS Processing, GTTR Decision Approval, Quick Decision Approval).

Quick Decision Approval

*Academic Institution:

PSUNV

PeopleSoft University

GTTR Course:

GT12

Info Tech Apps/American St

GTTR Campus:

A

GTTR Entry Year:

2009

Application Center:

Search

Approver:

0023

Brenda Black

Customize Find View All												First 1 of 1 Last		
	GTTR Personal ID	GTTR Application Code	Round Number	Last Name	First Name	GTTR Course Code	GTTR Campus	Entry Year	Entry Month	Institution Decision	Approval Status	Approve	Deny	Decision Processing
1	1081001113	GT02	1	Jeffreys	Jacob	GT12	A	2009	9	C	P	Approve	Deny	Decision Processing

GTTR Quick Decision Approval page

Entering or Updating a GTTR Confirmation Decision

Access the GTTR Confirmation Entry page (Student Admissions, UCAS Processing, GTTR Decision Processing, Confirmation Entry).

GTTR Confirmation Entry

Name: Elisa Autumn **ID:** 3739 **Date of Birth:** 01/04/1981
Academic Institution: PSGBR PeopleSoft University UK
GTTR Personal ID: 1100031388 [Personal Information](#) [Applicant Summary](#)
Application Code: GT01 **Application Year:** 2012

Choice Details			
Round Number:	2	☐ Clearing	Application Number: 00030575 Maintain Applications
GTTR Course:	D6X1		Campus: * Choice Details
Entry Year:	2012		Entry Month: 8 Application Notes
GTTR Decision:	Conditional Offer		Reply: Firm Acceptance
Modular:			Part Time: F

Decision Confirmation			
Institution Decision:	C Conditional Offer	Accept	Reject
Decision Date/Time:	10/06/2011 4:35:48PM	Decision Maker:	
Approval Status:	N Not Required	Approver:	
Course Change:		Campus Change:	
Entry Year Change:		Entry Month Change:	
Modular Change:		Part-Time Change:	

GTTR Confirmation Entry page (1 of 2)

▼ Degree Details		Find View All	First 1 of 1 Last
Degree Institution:			
Degree Title:			
Degree Status:			
Degree Result:			
Completion Year:	Completion Month:		
Degree Subject:			

▼ Letter Text	
Transaction Code:	'Evidence of teaching in a primary school.'
Letter Text:	Evidence of teaching in a primary school.

GTTR Confirmation Entry page (2 of 2)

The fields on this page are similar to those on the UCAS Confirmation Entry page. Note that only application records that are CF (decision is conditional offer, and reply is firm) or DF appear on the GTTR Confirmation Entry page regardless of whether a confirmation decision is pending or has been entered. Also, application records for which a conditional offer has been made during Clearing appear on this page.

Entering Multiple GTTR Confirmation Decisions

Access the GTTR Quick Confirmation page (Student Admissions, UCAS Processing, GTTR Decision Processing, Quick Confirmation).

GTTR Quick Confirmation

*Academic Institution

PSUNV

PeopleSoft University

GTTR Course

GT12

Japanese Studies/Mathematics

GTTR Campus

*

GTTR Entry Year

2010

Application Center

Search Decisions

Decision Maker

p022

Andrea Ashford

Decision Date/Time

20/04/10 02:58:01

Customize Find First 1 of 1 Last													
	GTTR Personal ID	GTTR Application Code	Round Number	Last Name	First Name	GTTR Course	GTTR Campus	Entry Year	Accept	Reject	Decision	Reply	Confirmation Details
1	2087000018	GT01	2	Beardsley	Kevin	GT12	*	2010	Accept	Reject	C	F	Confirmation Details

GTTR Quick Confirmation page

The fields on this page are similar to those on the UCAS Quick Confirmation page.

Approving or Rejecting a GTTR Confirmation Decision

Access the GTTR Confirmation Approval page (Student Admissions, UCAS Processing, GTTR Decision Approval, Confirmation Approval).

GTTR Confirmation Approval

Name: Elisa Autumn **ID:** 3739 **Date of Birth:** 01/04/1981
Academic Institution: PSGBR PeopleSoft University UK
GTTR Personal ID: 1100031388 [Personal Information](#) [Applicant Summary](#)
Application Code: GT01 **Application Year:** 2012

Choice Details			
Round Number:	2	☐ Clearing	Application Number: 00030575 Maintain Applications
GTTR Course:	D6X1		Campus: * Choice Details
Entry Year:	2012		Entry Month: 8 Application Notes
GTTR Decision:	Conditional Offer		Reply: Firm Acceptance
Modular:			Part Time: F

Decision Confirmation	
Institution Decision: A Accept	Approve Deny
Decision Date/Time: 10/06/11 4:38:42PM	Decision Maker:
Approval Status: P Awaiting Approval	Approver:
Course Change:	Campus Change:
Entry Year Change:	Entry Month Change:
Modular Change:	Part-Time Change:

GTTR Confirmation Approval page (1 of 2)

▼ Degree Details		Find View All	First 1 of 1 Last
Degree Institution:			
Degree Title:			
Degree Status:			
Result:			
Completion Year:	Completion Month:		
Degree Subject:			

▼ Letter Text	
Transaction Code:	'Evidence of teaching in a primary school.'
Letter Text:	Evidence of teaching in a primary school.

GTTR Confirmation Approval page (2 of 2)

Approving or Rejecting Multiple GTTR Confirmation Decisions

Access the GTTR Quick Confirmation Approval page (Student Admissions, UCAS Processing, GTTR Decision Approval, Quick Confirmation Approval).

Quick Confirmation Approval

*Academic Institution

PSUNV

PeopleSoft University

GTTR Course

GT12

Japanese Studies/Mathematics

GTTR Campus

*

GTTR Entry Year

2010

Application Center

Search Decisions

Approver

0023

Brenda Black

Customize Find View All [Grid Icon] [Print Icon]														First	1 of 1	Last
	GTTR Personal ID	GTTR Application Code	Round Number	Last Name	First Name	GTTR Course	GTTR Campus	Entry Year	Decision	Approve	Deny	Approval Status	Reply	Confirmation Details		
1	2087000018	GT01	2	Beardsley	Kevin	GT12	*	2010	A	Approve	Deny	P	F	Confirmation Details		

GTTR Quick Confirmation Approval page

Entering GTTR Clearing Details

Access the GTTR Enquiry Entry page (Student Admissions, UCAS Processing, GTTR Decision Processing, GTTR Enquiry Entry).

GTTR Enquiry Entry

Academic Institution: PSUNV PeopleSoft University

Enquiry ID: 1

Personal ID: 1097777654	*Application Year: 2010
Application Code: GT01	
*Surname: WEST	Title: Mr
*Forenames: ANDREW	
Date of Birth: 12/01/1990	Gender: Male
GTTR Course Code: GT12 Info Tech Apps/American St	GTTR Campus: A
GTTR Entry Year: 2010	Entry Month: 9
☐ Modular	☐ Part Time

Transaction Type: RX Clearing Decision

Decision: U Unconditional Offer

Decision Maker: 0022 Andrea Ashford

Decision Date/Time: 15/04/10 08:13:01

Transaction Code:

GTTR Enquiry Entry page

The Personal ID and Application Code fields look up values directly from the UCAS cvgName view.

Use the Transaction Type field to create a RX transaction for a Clearing enquiry. Use the Decision field to enter U (Unconditional) or C (Conditional). After you record the Clearing details, run the Transaction Processing process to generate the Clearing transactions to send to UCAS.

If you want to record a RX transaction, the UCAS Personal ID, UCAS Application Code, GTTR Course Code, Entry Year, Entry Month, Modular, Part Time, and Decision fields are required.

Reviewing and Updating GTTR Qualifications

Access the GTTR Qualifications page (Student Admissions, GTTR Processing, GTTR Decision Processing, Qualifications)

GTTR Qualifications

Name: Jacob White **ID:** 6389 **Date of Birth:** 01/01/1986
Academic Institution: PSUNV PeopleSoft University
Personal ID: 2097000029 [Personal Information](#)
Application Code: GT01 **Application Year:** 2011 [Applicant Summary](#)

Qualifications							Customize	Find	First	1 of 1	Last
Qualification Details		Subject Details									
Year	Month	Award Body	Type	Subject	Result						
2008	3	OCR	GCSE	Certificate of Art Appreciation	A						

GTTR Qualifications page

Reviewing GTTR Transactions

Access the GTTR Transactions page (Student Admissions, UCAS Processing, Transaction Processing, GTTR Transactions).

GTTR Transactions

Name: Wilson Marvel **ID:** 3286 **Date of Birth:** 29/06/1984
Academic Institution: PSGBR PeopleSoft University UK
GTTR Personal ID: 1000031076 [Personal Information](#) [Applicant Summary](#)
Application Code: GT01 **Application Year:** 2011

Choice Details			
Round Number:	2	☐ Clearing	Application Number: 00029989 Maintain Applications
GTTR Course:	C1X1 Biology		Campus: * Choice Details
Entry Year:	2011		Entry Month: 8 Application Notes
GTTR Decision:			Reply:
Modular:			Part Time: F

Decision Details			
Institution Decision:	U Unconditional Offer	Decision Maker:	
Decision Date/Time:	20/05/11 3:36:11AM	Approver:	
Approval Status:	N Not Required	Campus Change:	Modular Change:
Course Change:		Entry Year Change:	Entry Month Change: Part-Time Change:
Decision Code:			

GTTR Transactions page (1 of 2)

Transaction Details

[Find](#) | [View All](#) | First 1 of 1 Last

Transaction Type:	LD	Decision	Transaction ID:	4		
Error Code:	100	Transaction Code Invalid	Error Position:			
Decision:	U	Unconditional Offer	Created Date:	20/05/11 3:36:46AM		
Course:		Campus:	Modular:	N	Change to Non-Modular	
Entry Year:		Entry Month:	Part Time:	P	Part Time only	
Transaction Code:					☒ Auto	
					☒ Sent	
					☐ Hold	
					☐ Obsolete	

GTTR Transactions page (2 of 2)

The functionality of the GTTR transactions page is similar to that of the UCAS Transactions page. Additionally, most of the fields on the GTTR Transactions page are similar to those on the UCAS Transactions page.

When the decision is Interview, ensure that the interview date entered in the Transaction Code area contains only the date without the time element.

Reviewing GTTR Clearing Transactions

Access the GTTR Enquiry Transactions page (Student Admissions, UCAS Processing, Transaction Processing, GTTR Clearing Transactions).

GTTR Enquiry Transactions

Name: Andrew-60010002West

Date of Birth: 23/12/1969



Academic Institution: PSUNV PeopleSoft University

Enquiry ID: 1

Personal ID: 1081202108

Application Code: GT01

GTTR Course Code:

GTTR Campus: [Clearing Entry](#)

GTTR Entry Year: 2012

Entry Month:

Transaction Details

Find | View AllFirst1 of 1Last

*Transaction Type:



Transaction ID:



Error Code:

-1

Error Position:

Decision:



Created Date:

06/06/11 4:58:05PM

☐ Auto

Course:



Campus:



☐ Sent

Entry Year:

Entry Month:

☐ Hold

Modular:



Part Time:



☐ Obsolete

Transaction Code:

GTTR Enquiry Transactions page

Most of the fields on the GTTR Enquiry Transactions page are similar to those on the GTTR Transactions page.

Chapter 25

(GBR) Managing PBI Data Exchange

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

- Prepare for PBI data exchange.
- Create and maintain CAS Details records.
- Update multiple CAS records.
- Generate an XML file to send to SMS.
- Import CAS details from SMS.
- Generate PBI communications.

See Also

Appendix A, "(GBR) PBI Field Derivation," page 1119

Understanding PBI Data Exchange

Campus Solutions provides the following processing capabilities to support institutions with the Tier 4 student visa requirements of the United Kingdom Borders Agency (UKBA):

- The collection of the data from overseas applicants and continuing students to allow CAS requests to be submitted in bulk to the UKBA via the Sponsor Management System (SMS).
- The creation of XML files to transfer to SMS using Bulk Upload to request one or more CAS numbers.
- The import of CAS details from XML files created by SMS using Bulk Export after the UKBA has assigned CAS numbers.
- The generation of communications to notify an applicant or student of their assigned CAS number.
- The creation of XML files to transfer to SMS using Bulk Update in cases where the amount of fees paid by the applicant or student has changed after the CAS number has been assigned.
- The generation of communications to notify an applicant or student of the changed fee details.
- The creation of XML files to transfer to SMS using Bulk Report to report on applicants or students who have not enrolled or are not in attendance at your institution.

The following is an overview of how CAS requests are processed:

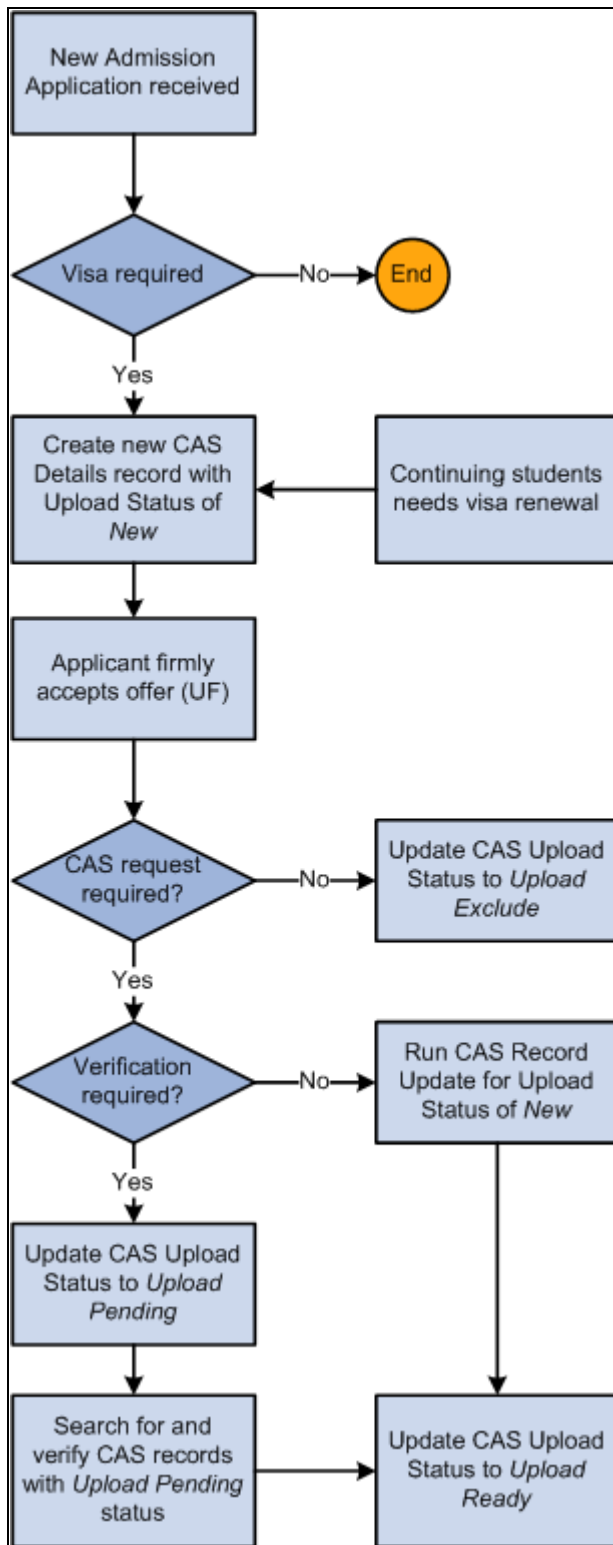
1. The institution creates CAS Details records in Campus Solutions for overseas applicants that require a student visa or for continuing students that require an extension to an existing visa. The CAS Details record can be created at the point the application is received or the institution may wish to wait until the applicant has accepted an offer of admission before creating the record.
2. The institution requests the Confirmation of Acceptance of Studies (CAS) number for the applicant or student either by submitting a bulk upload XML file created from Campus Solutions to SMS or by submitting an individual request for an applicant or student directly to the UKBA portal.
3. SMS processes each record and, if the processing is successful, assigns a CAS number and status (Assigned) to each record. The institution can use Campus Solutions to import these updates, which contain the CAS number, from a bulk export XML file generated from SMS.
4. The institution is responsible for passing the CAS number on to the applicant or student.
5. The applicant or student can then use the CAS number to apply for his or her student visa.
6. The institution can modify existing CAS records in SMS (for example, when students pay the tuition fees and you want to modify the CAS records for these students in SMS). To update the CAS records the institution can use Campus Solutions to create a Bulk Update XML file and submit the file to SMS.
7. When the applicant or student submits the visa application, UKBA updates the CAS status in SMS to Used. The institution can view the updated CAS record by signing into SMS or by using Campus Solutions to import the updated records from a bulk export XML file generated from SMS.
8. The institution can use Campus Solutions to fulfill their reporting duties for applicant or student who have failed to enroll or are not in attendance. The institution can use Campus Solutions to create a Bulk Report XML file that contains data of students who have used a CAS number supplied by the institution but have not registered or enrolled.

Note. The academic institution and SMS exchanges the applicant and student data in XML format. Review the Bulk Data Transfer Toolkit available from the UKBA website. This toolkit provides details on the XML files such as the XML schema, examples of export and import XML files, and validation rules.

See The UK Border Agency website

The CAS Maintenance component and the CAS Record Update process are used to create and manage CAS Details records and prepare records for inclusion a Bulk Upload file to request CAS numbers from the UKBA. An optional verification step can be built into the process to allow the request details to be reviewed before the request is sent.

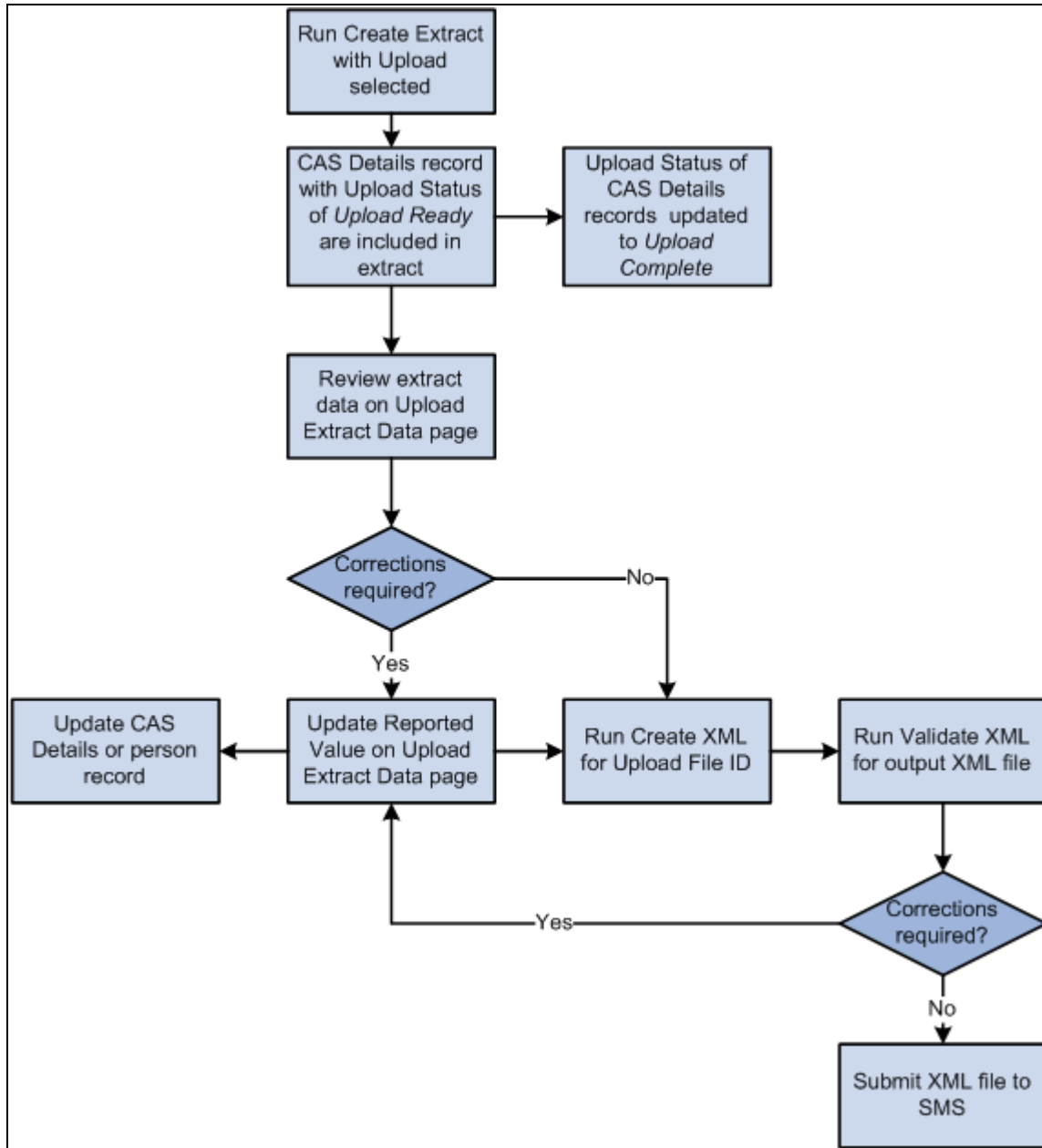
The following diagram illustrates the process for creating and maintaining CAS Details records.



Creating and Maintaining a CAS Details Record

Once records are ready to be sent to the UKBA the Create Extract process, the Upload Extract Data component and the Create and Validate XML processes are used to create and review upload records and to generate the XML file for transfer to SMS.

The following diagram illustrates the process for creating and sending the Bulk Upload XML file to SMS.



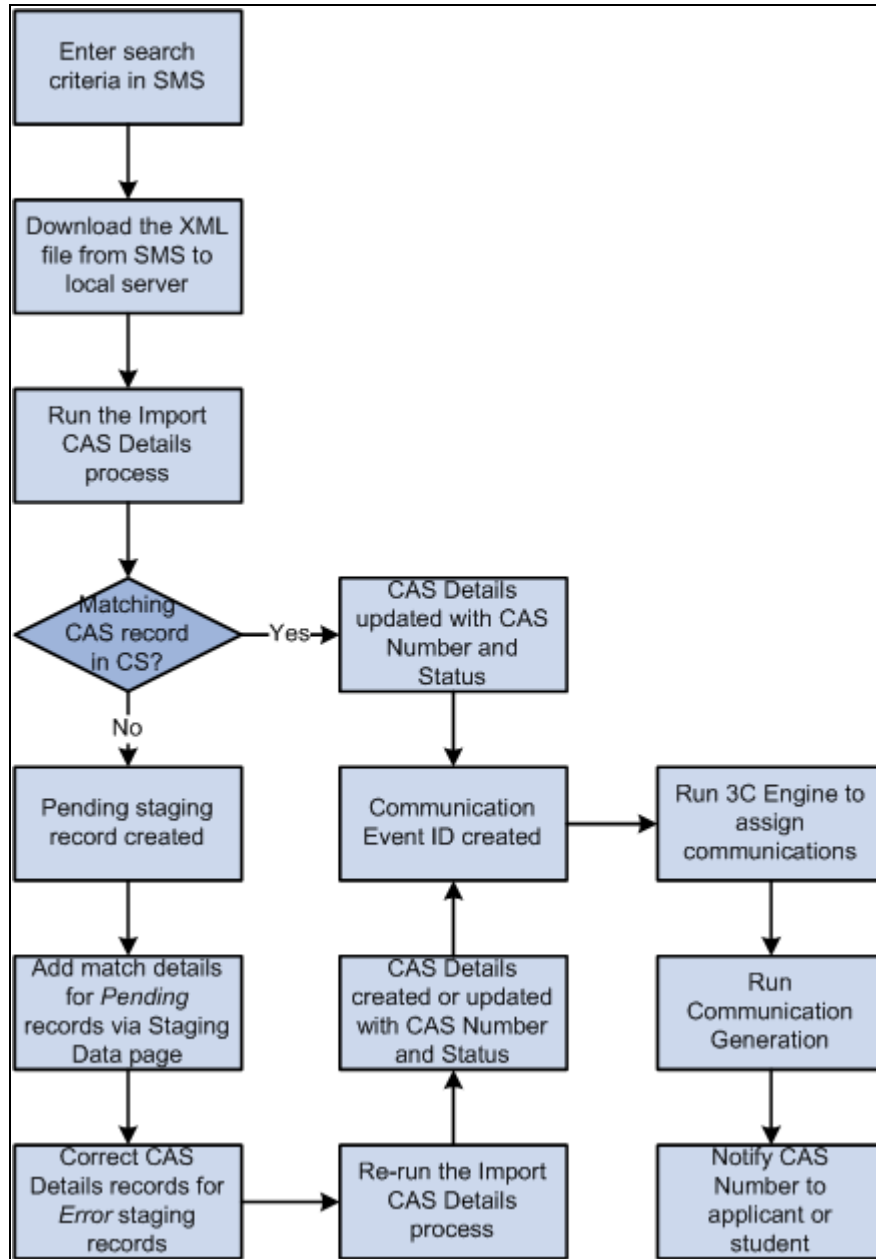
Creating and Sending the Bulk Upload XML file to SMS

After you submit the CAS number requests to SMS the UKBA assigns a CAS number to the applicant or student. You can generate a Bulk Export XML file from SMS and import the details using the Import CAS Details process.

Download the XML file and load the XML data into Campus Solutions using the import process. The process will update the CAS Number and CAS Status details for matched. Unmatched records can be reviewed using the CAS Staging Data component, match details added and the records re-processed.

You can also import subsequent CAS status changes from SMS when the UKBA update the status to one of the post-assigned values: *Used* (when the applicant has used the CAS number to apply for a visa), *Cancelled*, *Expired*, *Obsolete* and *Withdrawn*.

The following diagram illustrates the process for importing CAS Details:

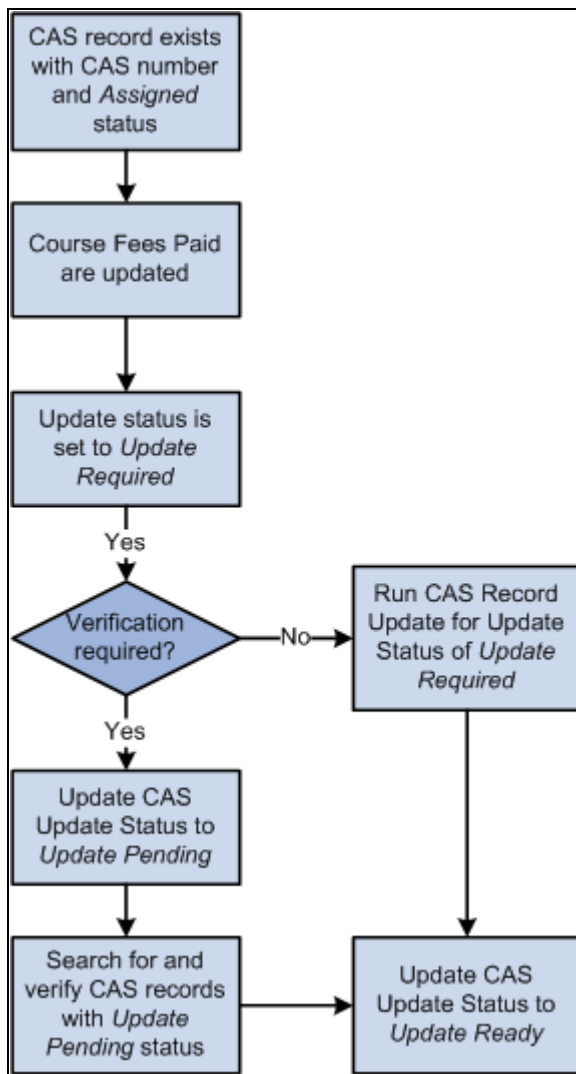


Importing CAS Details

Once the CAS number has been assigned any changes to the fees paid fields need to be reported to the UKBA via the Bulk Update file. When any of the fees paid fields is updated for CAS records that have a CAS number, the system automatically sets the Update Status to the status defined for Update Required. The Create Extract process can then be run to select these records for inclusion in the Bulk Update XML file. You can choose to follow an optional verification step before setting the Update Status to Update Ready.

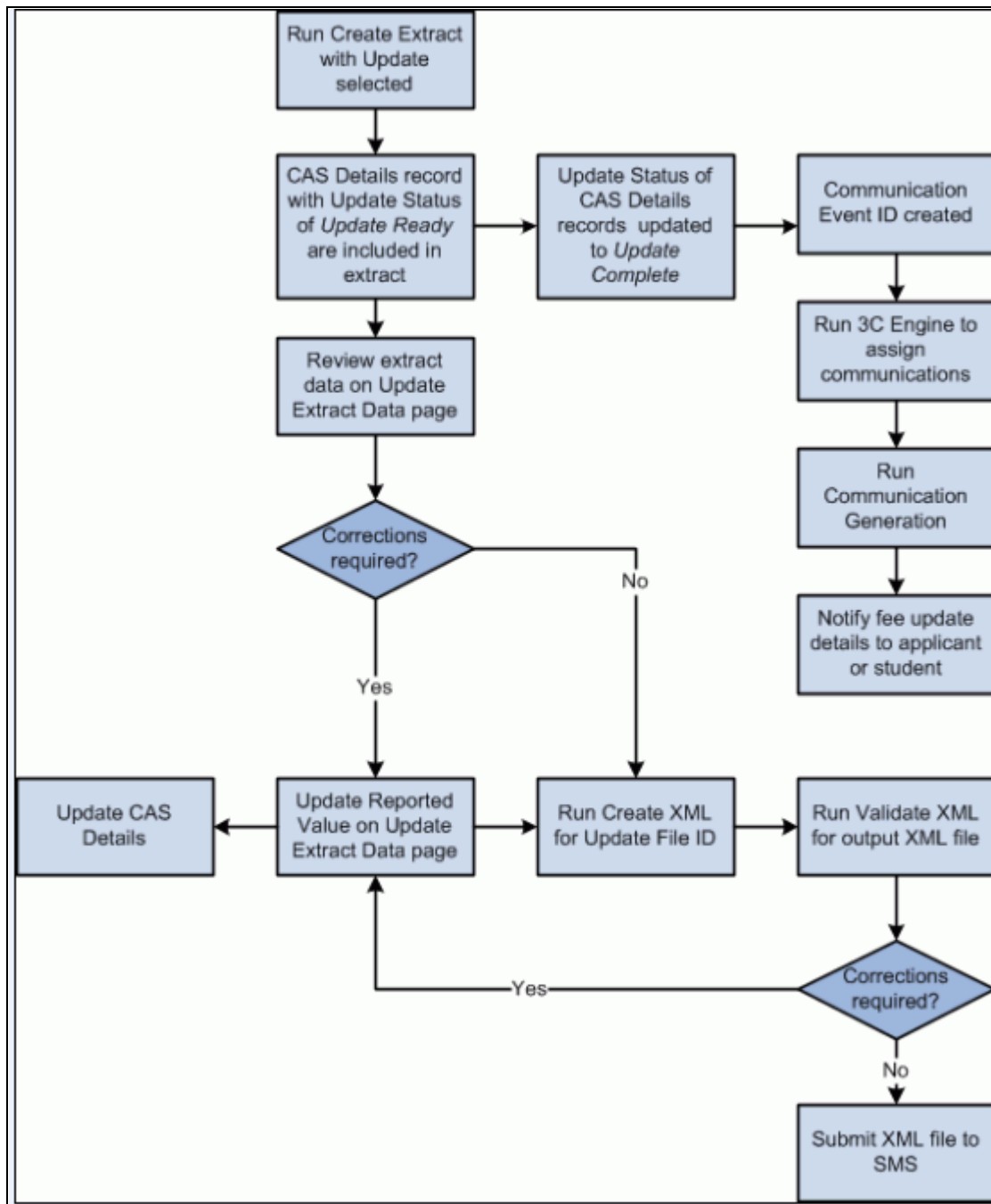
While the CAS status is Assigned a CAS record can be included in multiple Bulk Updates as the fees paid values change over time. Once the CAS Status is updated to one of the post-assigned values then further updates for the fees paid fields are not required.

The following diagram illustrates the process for preparing CAS records for inclusion in the Bulk Update XML file.



Preparing CAS Records for the Bulk Update XML file

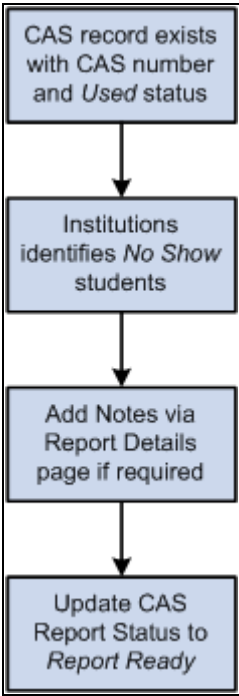
The following diagram illustrates the process for creating the Bulk Update XML file.



Creating the Bulk Update XML File

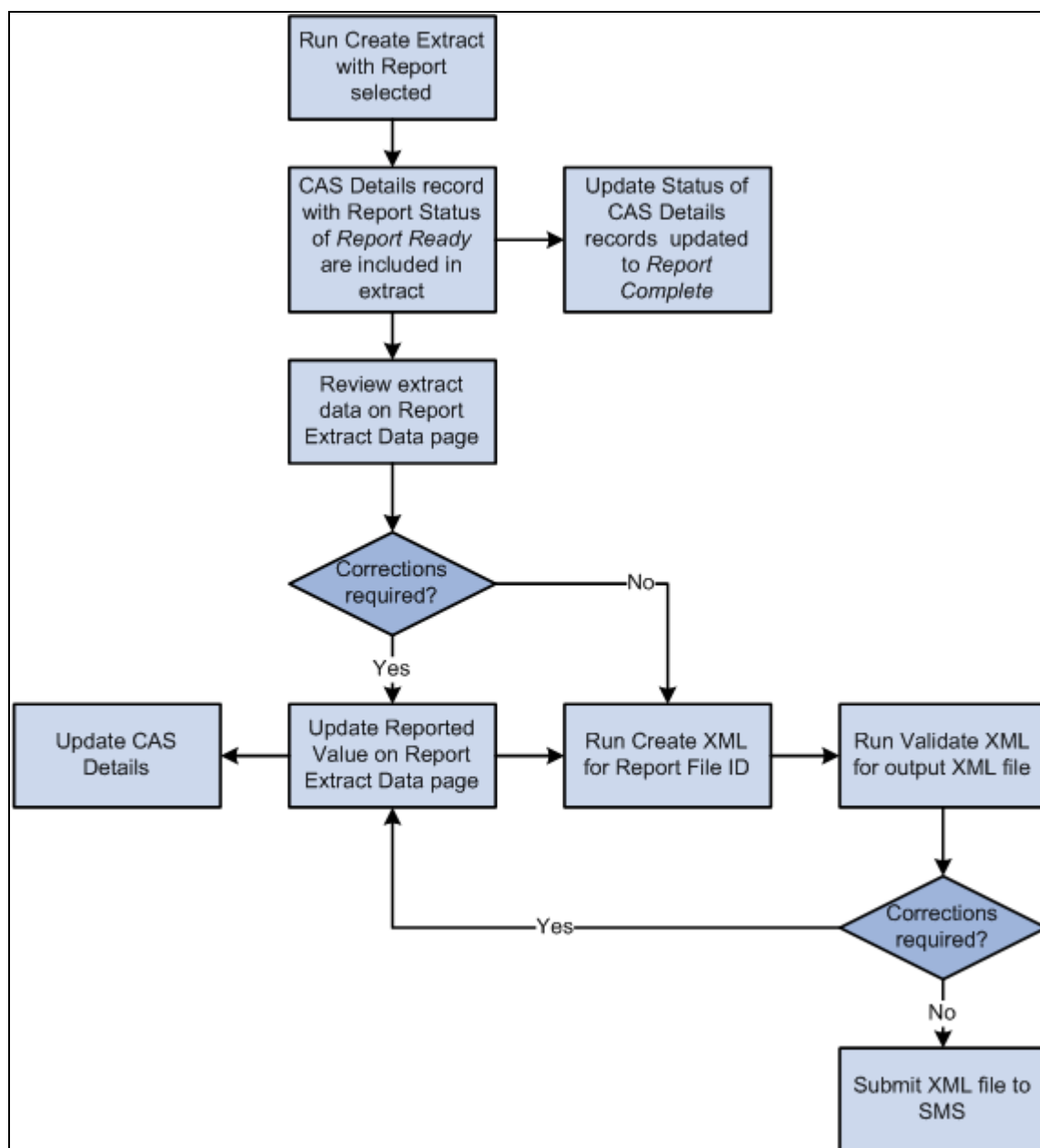
CAS records need to be submitted to SMS in the Bulk Report file if the applicant or student has used the CAS number in their visa application but is not attending your institution. You can set the Report Status to indicate the applicant or student is not attending. Once you have set this status, the Create Extract Data process can be used to select record for inclusion in the Bulk Report XML file.

The following diagram illustrates the process for preparing records for inclusion in the Bulk Report XML file:



Preparing CAS Records for the Bulk Report XML file

The following diagram illustrates the process for creating the Bulk Report XML file.



Creating the Bulk Report XML File

Preparing for PBI Data Exchange

Before you start importing and exporting SMS data, you must set up Campus Solutions as follows:

- Enable the PBI functionality for all institutions or for a specific institution.
- Set up a PBI configuration record.
- Set up CAS statuses.
- Define the UKBA Sponsor License Number for partner institutions.

- Enter the PBI data for academic programs.
- Enter the PBI data for academic plans.
- Set up PBI Communications

Defining field values at the configuration level

You can define default values for fields in the Upload extract on the PBI Configuration page if you do not want to specify field values separately at the program and plan levels or at the individual CAS record level.

Defining field values at the academic program and plan levels

For a particular academic program or plan, the value that your institution wants to include in the Upload or Update extract for one or more fields may be the same for all the applicants or students for that academic program or plan. Use the Academic Program and Academic Plan PBI Data pages to define field values at program and plan level respectively, rather than using the CAS Maintenance component to enter field values for each individual applicant or student.

If the same value applies to all academic plans associated with an academic program the value can be defined at academic program level only. The defined values are used to default the values for the corresponding fields when a new CAS Details record is created.

Defining field values at the CAS record level

You can choose to enter or update field values at the applicant or student level using the CAS Maintenance component.

See "Creating and Maintaining CAS Details" section in this chapter.

Note

For most fields the extract process will first look at the CAS Details record to derive a field value. In most cases if a default value has been defined at Academic Plan, Academic Program or Configuration level then the field will be automatically populated in the CAS Details record when it is created. For some fields if a value has not been defined at that CAS Details level, then the process will look at the Academic Plan level. If a value has not been defined at the Academic Plan level, then it looks at the Academic Program level. If a value has not been defined at Academic Program level, finally it derives the field value from the Configuration level. Refer to the "(GBR) PBI Field Derivation" appendix for information about the derivation of individual fields.

Pages Used to Prepare for PBI Data Exchange

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Enable the PBI pages and links in Campus Solutions.

Page Name	Definition Name	Navigation	Usage
Academic Institution 6	SSR_INST_FEATURES	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6	Enable the PBI pages and links in Campus Solutions for a specific institution.
PBI Configuration	SAD_PB_CONFIG	Student Admissions, PBI Processing, PBI Configuration	Create a PBI configuration record. Enter the sponsor license numbers of your institution and campuses. Also, specify field and course date defaults, and applicant and student communication details.
Statuses	SAD_PB_CONFIG1	Student Admissions, PBI Processing, PBI Configuration, Statuses	Define the various processing statuses for CAS records.
Regional	SAD_UC_SCHOOL_SBP	Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional	Define the UKBA Sponsor License Number for an external organization being reported to UKBA as a Partner Institution.
Academic Program PBI Data	SAD_PB_PROG	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, PBI Data	Specify field values at program level.
Academic Plan PBI Data	SAD_PB_PLAN	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, PBI Data	Specify field values at plan level.

Enabling the UK Fields for All Institutions

Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

Installation Student Admin

SA Features

Installation Student Administration

CRM Integration

☐ CRM for Higher Education

Australia

☒ DEST, HECS, Centrelink, TAC Last CART Request ID:

Canada

☒ Government Reporting ☒ OUAC

New Zealand

☒ NSI and SDR Personal Data, SDR Degree

The Netherlands

☐ Use Dutch Functionality

United Kingdom

☒ HESA, UCAS
☒ PBI

SA Features page

Select the PBI check box to enable PBI pages, fields, and links fields in Campus Solutions.

Enabling the UK Fields for a Specific Institution

Access the Academic Institution 6 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6).

Academic Institution 4		Academic Institution 5		Academic Institution 6		Academic Institution 7	
Academic Institution:		PSUNV		PeopleSoft University			
						Find View All First 1 of 1 Last	
Effective Date:		01/01/1900		Status:		Active	
Australia							
☐ DEST, HECS, Centrelink, TAC							
Canada							
☐ Government Reporting							
New Zealand							
☐ Catalog, SDR, EFTS, StudyLink							
☐ NZQA							
Netherlands							
☐ Higher Education							
☐ Studielink Participant							
United Kingdom							
☒ HESA, UCAS							
☒ PBI							

Academic Institution 6 page

Select the PBI check box to enable PBI pages, fields, and links in Campus Solutions for a specific institution.

Setting Up a PBI Configuration Record

Access the PBI Configuration page (Student Admissions, PBI Processing, Configuration).

[New Window](#) | [Customize](#)

PBI Configuration | **Statuses**

*Academic Institution: PeopleSoft University ☐ Enable Sub-Plan Reporting

*Sponsor Licence Number: YQCBYJA62 *Tier ID: Tier 4

*Category: General *Schema ID: T4General Ready To

Main Site of Study: PSCSHCDA Hacienda

Field Defaults

Work Placement: No ATAS Certificate Required: No

Accommodation Provided: No Dean's Certificate Required: No

Accommodation Fees Included: No

Admit Term Defaults Find | View All First 1-2 of 4 Last

*Admit Term	Description	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End
0710	2013 Fall			01/09/2013	30/10/2013	08/09/2013	31/07/2016
0690	2012 Fall			01/09/2012	30/10/2012	08/09/2012	31/07/2015

PBI Configuration page (1 of 2)

Communication Details Find First 1-4 of 4 Last

*Notification Type	*Record Type	Event ID	Description
CAS Number	Applicant	CASA	CAS Applicant
CAS Number	Student	CASB	CAS Student
Fee Update	Applicant	CASFA	CAS Fees Applicant
Fee Update	Student	CASFB	CAS Fees Students

Campus Details Find First 1 of 1 Last

*Campus	Description	*Sponsor Licence Number
WALCR	Walnut Creek Campus	YQCBYJA63

PBI Configuration page (2 of 2)

Enable Sub-Plan Reporting Select the check box for Sub-Plans to be considered in the derivation of Course Title in the Upload extract.

Sponsor License Number Enter your institution's license number. The value is used to derive the corresponding field in the Upload extract.

Use the Tier ID, Category and Schema ID fields to specify the values that are used to derive the corresponding fields in the Upload extract.

Main Site of Study Enter the Location if the same Main Site details are reported in the Upload extract for all CAS records for your institution. The value is displayed as the default Main Site on the CAS Details page. The value is used in the derivation of the Main Site address fields in the Upload extract if no Reported Site is defined in the individual CAS Details record.

Field Defaults

Use this region to specify the field values used to derive the corresponding fields in the Upload and Update extracts. These values are used as default values if no value is defined at program, plan, or individual CAS level.

Admit Term Defaults

For each term, define the values that are used to populate the fees and course date fields in new CAS records if no values are defined at plan or program level. The Latest Acceptance Date should be on or after the Course Start Date.

Communication Details

Campus Community's Communication Generation process uses the event IDs, you set up on this region, to notify the CAS number or fee update details to the applicant or student.

Notification Type	Indicate whether you want to notify <i>CAS Number</i> or <i>Fee Update</i> .
Record Type	Indicate whether you want to notify the applicant or student.
Event ID	Select the event ID that you want the system to assign the applicant or student. You can select only event IDs defined for the CASN administrative function in Campus Community. The CASN function captures Academic Career, Career Number and CAS Number as variable data. Refer to the section "Setting Up PBI Communications" for information about the event ID setups.

The system assigns an event ID for *CAS Number* notification type to a person when the Import CAS Details process loads the CAS number from the inbound XML file for the first time. Refer to the section "Importing CAS Details" for more information about how the process assigns event IDs for CAS Number notification.

The system assigns an event ID for *Fee Update* notification type when the Create Extract process creates the update extract data.

You can create one or more communication records using the Communication Generation process to notify the CAS number or fee update details to the applicant or student.

Campus Details

Use this region to specify Sponsor Licence Numbers for individual Campuses if your institution has a different licence number for a particular campus. The value is used to derive the corresponding field in the Upload extract based on the Campus value of the applicant or student in place of the value defined for your institution. If no value is defined the value defined for the institution is used.

Setting up CAS Statuses

Access the Statuses page (Student Admissions, PBI Processing, PBI Configuration, Statuses).

PBI Configuration

Statuses

*Academic Institution:

PeopleSoft University

☒

Apply Academic Org Security

New CAS Record:

New

*Upload Ready:

Upload Ready

*Upload Complete:

Upload Complete

*Update Required:

Update Required

*Update Complete:

Update Complete

*Update Ready:

Update Ready

*Report Ready:

Report Ready

*Report Complete:

Report Complete

Statuses page

Apply Academic Org Security (apply academic organization security)

Select to have the Create Extract process choose only that CAS record for which the user ID has access to at least one academic organization.

Clear this check box if you want the process to choose a CAS record regardless of whether the user ID has access to the related academic organization.

Refer to the following "Applying Academic Organization Security to the Create Extract Process" topic in this section for more information about this setup.

New CAS Record

Choose an Upload status value that the system assigns to new CAS records. If you do not choose a value, the system assigns a blank Upload status.

Upload Ready

Choose an Upload status value. The Create Extract Data process uses this value to select CAS records for inclusion in the Upload extract.

Upload Complete

Choose an Upload status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Upload extract.

Update Required

Choose an Update status value that the system assigns to CAS records where the CAS number has been imported and a subsequent change is made to one of the fees paid fields.

Update Ready

Choose an Update status value. The Create Extract Data process uses this value to select records for inclusion in the Update extract.

Update Complete

Choose an Update status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Update extract.

Report Ready

Choose a Report status value. The user uses this value to indicate that a record is ready to be included in the Report extract. The Create Extract Data process uses this value to select records for inclusion in the Report extract.

Report Complete

Choose a Report status value. The Create Extract Data process uses this value to create a new effective dated record to indicate that a CAS record has been included in the Report extract.

Statuses are delivered as translate values for Upload (SAD_PB_UPLOAD), Update (SAD_PB_UPDATE) and Report (SAD_PB_REPORT). You can amend or add to the translate values as required.

If additional verification steps are required before a CAS record is ready for inclusion in the Upload extract, additional interim statuses can be defined and used to manage individual CAS records. Additional statuses can be defined and used to prevent CAS records from being included in the Upload extract if required.

If a verification step is required between one of the fees paid values being updated and the record being included in the Update extract, different status values can be defined for Update Required and Update Ready. If no verification step is required the same status value for Update Ready can be used for both fields.

Note. To allow records to be retrieved using the single Processing Status search field in the CAS Maintenance component it is recommended that distinct status values are defined for Upload, Update and Extract.

The following is a scenario on how the statuses work where there are verification steps before a CAS record is included in an extract:

1. Use PeopleTools to create additional status values required. For example: new Upload Statuses of *Upload Exclude* and *Upload Pending* and a new Update Status of *Update Pending*.
2. Use the Statuses page to define the required values.
3. Use the CAS Maintenance component to create CAS records. The Upload Status is automatically set to *New* when you create the records.
4. Use the CAS Record Update process or CAS Details page to set the Upload Status to *Upload Exclude* for records that should be excluded from the Upload extract. For example, for a second CAS record for an applicant where the previous CAS record has already been sent and a CAS number requested.
5. Use the CAS Record Update process or CAS Details page to set the Upload Status to *Upload Pending* for records where all the details have been entered and the record needs to be verified before it is included in an Upload extract.
6. Use the CAS Record Update process or CAS Details page to change the Upload Status from *Upload Pending* to *Upload Ready* for records that have been verified and are ready to be included in an Upload extract.
7. Run the Create Extract Data process with the Create Upload option selected. The process picks up only those records that have an Upload Status of *Upload Ready*.
8. After including the record data in the extract, the Create Extract Data process sets the Upload Status to *Upload Complete* and saves the Upload File ID to each CAS record included.
9. After importing the CAS number, when you update the fees paid details on the CAS Details page, the system automatically sets the Update Status to *Update Required*.
10. Use the CAS Record Update process or CAS Details page to set the Update Status to *Update Pending* for records where the fees paid changes need to be verified before the record is included in an Update extract.

11. Use the CAS Record Update process or CAS Details page to change the Update Status from *Update Pending* to *Update Ready* for records that have been verified and are ready to be included in an Update extract.
12. Run the Create Extract Data process with the Create Update option selected. The process picks up records that have an Update Status of *Update Ready*.
13. After including the record data in the extract, the Create Extract Data process sets the update status to *Update Complete*.
14. Use the CAS Record Update process or CAS Details page to set the Report Status to *Report Ready* for the CAS records where the CAS number has been used and the applicant or student has not enrolled at your institution.
15. Run the Create Extract Data process with the Create Report option selected. The process picks up only those records that have a Report Status of *Report Ready*.
16. After including the record data in the extract, the Create Extract Data process sets the status to *Report Complete*.

Applying Academic Organization Security to the Create Extract Process

These are the high-level steps to set up academic organization security for the Create Extract process:

1. Select the Apply Academic Org Security on the Statuses page.
2. Use the Academic Org Security page to grant or restrict access to academic organizations (Set Up SACR, Security, Secure Student Administration, User ID, Academic Org Security, Academic Org Security). Only those academic organizations defined using the Tree Manager are available for selection on the Academic Org Security page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, Designing Your Academic Structure, Defining Academic Organizations

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, Securing Your Academic Institution, Securing Academic Organizations

3. Use the Taxonomy/Campus page to link academic programs to academic organizations (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Taxonomy/Campus).

If you are not linking programs, link plans as described in the next step.

4. Use the Owner page to link academic plans to academic organizations (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Owner).

If you are not linking plans, link programs as described in the previous step.

The Create Extract process performs the following steps if you select the Applying Academic Organization Security check box on the Statuses page:

Step 1: Select the program and plan for the CAS record

For a CAS record with type = *applicant*:

- Select the academic program from the latest effective dated Campus Solutions admission application record (the CAS Details page displays this record).

- Select the reported plan from the CAS Details record or if the reported plan does not exist, then select the plan that starts with the lowest alphabet from the latest effective dated Campus Solutions admission application record. For example, suppose if the reported plan does not exist and there are two plans: Biology and Zoology. Then, select Biology.

For a CAS record with type = *student*:

- Select the academic program from the latest effective dated Campus Solutions student program record (the CAS Details page displays this record).
- Select the reported plan from the CAS Details record or if the reported plan does not exist, then select the plan that starts with the lowest alphabet from the latest effective dated Campus Solutions student program record.

Step 2: Use the Taxonomy/Campus and Owner pages to find out the academic organizations that are linked with the selected academic program and academic plan.

Step 3: Use the Academic Org Security page to find out whether the user ID that you are using to run the Create Extract process has access to the academic organizations.

Step 4: If the user ID has access to the academic organization, include the CAS record in the extract.

Entering the PBI Data for an Academic Program

Access the Academic Program PBI Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, PBI Data).

[New Window](#) | [Customize Page](#) | [http](#)

[Course](#) | [Dynamic Date](#) | [Home Campus NLD](#) | [Program HESA Data](#) | [Program Offering/Year HESA](#) | **[PBI Data](#)**

Academic Institution: PSGBR PeopleSoft University UK
 Academic Program: BA Bachelor of Arts

[Find](#) | [View All](#) | First 1 of 1

Effective Date: 01/01/1999 Status: Active

Points Based Immigration Data

Partner Institution: 000010013 Swarthmore College
 Overseas Institution: 000010060 University of Montreal
 Work Placement: Yes Accommodation Provided: No
 Placement Organisation: 2000100 Blue Line Associates
 ATAS Certificate Required: No Dean's Certificate Required: No
 Accommodation Fees Included: No Months Duration: 36
 Course Hours: 36.0

Admit Term Defaults [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | First 1 of 1 Last

*Admit Term	Description	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End		
1 2090	2009-2010 Academic Year	8935.00	2182.00	10/09/2009	30/10/2009	10/09/2009	30/06/2012	+	-

Academic Program PBI Data page

This page appears only if you have selected the PBI check box on the Academic Institution 6 or SA Features page. The values defined are used to populate the corresponding fields in new CAS records if no value is defined for the field at plan level. Values are also used during field derivation.

See the "(GBR) PBI Field Derivation" appendix for information about the derivation of individual fields.

Entering the PBI Data for an Academic Plan

Access the Academic Plan PBI Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, PBI Data).

Academic Plan Table	Print Options	Taxonomy	Owner	Plan HESA Data	Plan Offering/Year HESA	PBI Data

Academic Institution: PSGBR PeopleSoft University UK
 Academic Plan: POLISCI Political Science

Find | View All First 1 of 1 Last

Effective Date: 02/01/1999 Status: Active

Points Based Immigration Data

Partner Institution: 000010079 Royal Holloway U Lon
 Overseas Institution: 000010115 University of Georgia
 Work Placement: Yes Accommodation Provided: No
 Placement Organisation: AV1030 Modelman Foundation
 ATAS Certificate Required: No Dean's Certificate Required: No
 Accommodation Fees Included: No Months Duration: 36
 Course Hours: 25.0

Admit Term Defaults Customize | Find | View All | First 1 of 1 Last

*Admit Term	Description	Course Fees	Boarding Fees	Start Date	Latest Acceptance	Expected Enrollment	Expected End
1 2090	2009-2010 Academic Year	9935.00	3754.00	10/09/2009	30/10/2009	17/09/2009	30/06/2012

Academic Plan PBI Data page

This page appears only if you have selected the PBI check box on the Academic Institution 6 or SA Features page. The values defined are used to populate the corresponding fields in new CAS records. Values are also used during field derivation.

See the "(GBR) PBI Field Derivation" appendix for information about the derivation of individual fields.

Setting Up PBI Communications

You will need to set up Campus Community communications to notify applicants and students about their assigned CAS numbers or fee update details. This section discusses the steps required to define the Event ID values that are used in the PBI Configuration page, the Import CAS Details process (for CAS Number notification), the Create Extract - update process (for Fee Update notification), the 3C Engine process and the Communications Generation process to create communications to notify applicants and students. You should also refer to the *PeopleSoft Campus Community 9.0 PeopleBook* for setting up communications.

This section provides communications setup examples for sending CAS number notifications to applicants and students. Similar setups are required for Fee Update notification. The Fee Update notification should contain the relevant update data: First Year Course Fees, Course Fees Paid, Accommodation Fees Paid, and Boarding Fees Paid.

The PeopleSoft system provides a CASN administrative function that captures the variable data required to identify the CAS record that has been updated. The variable data can be used to generate communications, checklists or comments associated with an Event ID. No further setup is required for this function.

The following is the variable data that is automatically populated from the incoming CAS record:

- Academic Career
- Student Career Number
- CAS Number

This example shows the CASN administrative function:

Administrative Function Table

Administrative Function: CASN

Description	Find	View All	First	1 of 1	Last
*Effective Date: 01/01/1900  *Status: Active  Variable Data  					
*Description: CAS Notification					
Short Description: CAS Notf					
☒ Admin Function - People ☐ Admin Function - Organizations					

Administrative Function Table page for CASN

To access the Administrative Function table, select Set Up SACR, Common Definitions, Administrative Function Table.

Creating Queries

Access the Query Manager page (Reporting Tools, Query, Query Manager).

The PeopleSoft system delivers example queries, one for CAS Number notifications to applicants (QA_SAD_PB_CASA) and one for CAS Number notifications to continuing students (QA_SAD_PB_CASB).

Create your own queries to select all the data you require for your communications. Refer to the "Defining Communication Data Sources" section in this chapter for information about data sources.

Each query requires the following:

- The core record must be included in the query associated with the administrative function. For the CASN function, the CAS Details record (SAD_PB_CAS) must be included.
- A prompt must be created for the applicant/student ID. The Unique Prompt Name must be changed to *Person_ID*.
- Prompts must also be created for the variable data fields relating to the administrative function, ACAD_CAREER, STDNT_CAR_NBR and SAD_PB_CAS_NUMBER.

This example shows the selected fields for the QA_SAD_PB_CASA query:

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQLRun

Query Name: QA_SAD_PB_CASA

Description: CAS Applicant

Feed

View field properties, or use field as criteria in query statement.

Reorder / Sort

Fields

CustomizeFindView All

First1-10 of 10Last

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - ID	Char11				ID		Edit	
2	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	
3	A.SAD_PB_REC_TYPE - Record Type	Char1		N		Type		Edit	
4	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	
5	A.STDNT_CAR_NBR - Student Career Nbr	Num3.0				Career Nbr		Edit	
6	A.ADM_APPL_NBR - Application Nbr	Char8				Appl Nbr		Edit	
7	A.APPL_PROG_NBR - Application Program Nbr	Num3.0				Prog Nbr		Edit	
8	A.EFFDT - Effective Date	Date				Eff Date		Edit	
9	A.EFFSEQ - Effective Sequence	Num3.0				Sequence		Edit	
10	A.SAD_PB_CAS_NUMBER - CAS Number	Char14				CAS Number		Edit	

Fields page for the QA_SAD_PB_CASA query

This example shows the selected records for the QA_SAD_PB_CASA query:

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQLRun

Query Name: QA_SAD_PB_CASA

Description: CAS Applicant

Feed

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

AliasRecord

A

SAD_PB_CAS - CAS Details

Hierarchy Join

B

ADM_APPL_PROG - Admission Applicant Program

Hierarchy Join

Expand All Records

Collapse All Records

Query page for the QA_SAD_PB_CASA query

This example shows the selected fields for the QA_SAD_PB_CASB query:

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name: QA_SAD_PB_CASB

Description: CAS Student

Feed

View field properties, or use field as criteria in query statement.

Reorder / Sort

Fields

Customize | Find | View All | | First 1-9 of 9 Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - ID	Char11				ID		Edit	
2	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	
3	A.SAD_PB_REC_TYPE - Record Type	Char1		N		Type		Edit	
4	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	
5	A.STDNT_CAR_NBR - Student Career Nbr	Num3.0				Career Nbr		Edit	
6	A.EFFDT - Effective Date	Date				Eff Date		Edit	
7	A.EFFSEQ - Effective Sequence	Num3.0				Sequence		Edit	
8	A.SAD_PB_CAS_NUMBER - CAS Number	Char14				CAS Number		Edit	
9	A.SAD_PB_REC_NUMBER - Record Number	Num3.0				Record Number		Edit	

Fields page for the QA_SAD_PB_CASB query

This example shows the selected records for the QA_SAD_PB_CASB query:

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name: QA_SAD_PB_CASB

Description: CAS Student

 Feed

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.



Chosen Records

Alias

Record



A SAD_PB_CAS - CAS Details

[Hierarchy Join](#)





B ACAD_PROG - Student Academic Program

[Hierarchy Join](#)



Expand All Records

Collapse All Records

Query page for the QA_SAD_PB_CASB query

Defining Communication Data Sources

Access the Communication Data Source page (Campus Community, Communications, Set up Communications, Communication Data Source).

Define Communication Data Sources for each query. .

This example shows the CASA data source map ID:

Communication Data Source

*Data Source Map ID

CASA

Description

CAS Applicant

Object Owner ID

Admissions - UK

Data Source Type

XMLDoc Object

☒ Active

Data Source Context

*Administrative Function

CASN

CAS Notification

☒ Person

☐ Organization

Generic Process Data

Find

First

1-9 of 9

Last

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	☐
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	☐
6	Name for individual address	PER_NAME_ADDR	☐
7	Name for extra use	PER_NAME_EXTRA	☐
8	Name for individual salutation	PER_NAME_SAL	☐
9	Name for joint salutation	PER_NAME_SALJNT	☐

Custom Extract Data

Find

First

1 of 1

Last

Sequence	*Type	Query Name	Max Nbr	Application Class		
1	Query	QA_SAD_PB_CASA			+	-

Registered Date/Time

25/03/10 13:22:03

Registered By

PS

Last Update Date/Time

30/03/10 07:24:19

Last Update User ID

PS

[View/Download Sample Data File](#)

Register Data Source

Communication Data Source page for CASA

This example shows the CASB data source map ID:

Communication Data Source

*Data Source Map ID:

Description:

Object Owner ID:

Data Source Type: XMLDoc Object ☒ Active

Data Source Context

*Administrative Function: CAS Notification ☒ Person ☐ Organization

Generic Process Data

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	☐
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	☐
6	Name for individual address	PER_NAME_ADDR	☐
7	Name for extra use	PER_NAME_EXTRA	☐
8	Name for individual salutation	PER_NAME_SAL	☐
9	Name for joint salutation	PER_NAME_SALJNT	☐

Custom Extract Data

Sequence	*Type	Query Name	Max Nbr	Application Class
1	Query	QA_SAD_PB_CASB		

Registered Date/Time: 25/03/10 13:23:18 Registered By: PS

Last Update Date/Time: 25/03/10 13:23:18 Last Update User ID: PS

[View/Download Sample Data File](#)

Communication Data Source page for CASB

Defining Report Definitions

Access the Definition page (Reporting Tools, BI Publisher, Report Definition).

Example templates are delivered that can be used in Report Definitions for CAS Number notifications to applicants (CASA_1) and CAS Number notifications to students (CASB_1). The templates have been created from the XML file downloaded from each Data Source using Oracle BI Publisher.

Create your own template files. There are several possible methods including installing BI Publisher for Word which creates a new menu option in Word. A template can then be created from the XML document downloaded from the Data Source page.

This example shows the Definition page for CASA:

DefinitionTemplateOutputPropertiesSecurityBursting

Report Name: CASA

Data Source

Data Source type: XMLDoc Object

Data Source ID: CASA

Data Source Description: CAS Applicant

Report Properties

Report Description: CAS Applicant

*Report Status: Active

*Report Category ID: ALLUSER All PeopleSoft User

Object Owner ID: PeopleTools

*Template Type: RTF

Retention Days:

Registered Date/Time: 25/03/2010 13:26:42Registered By: PS

Updated Date/Time: 25/03/2010 13:26:42Updated By: PS

Download: Data SchemaSample Data

Definition page for CASA

This example shows the Template page for CASA:

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711

DefinitionTemplateOutputPropertiesSecurityBursting

Report Name: CASA

Template

Find | View AllFirst1 of 1Last

Template ID: CASA_1

Description:

*Language Code: English

Channel: Email

Effective Date: 30/03/2010

*Status: Active

Template File: CASA_1.rtf

Default Template

Upload

Preview

Use Alt. XML

Template page for CASA

This example shows the Definition page for CASB:

712

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Definition

Template

Output

Properties

Security

Bursting

Report Name:

CASB

Data Source

Data Source Type:

XMLDoc Object

Data Source ID:

CASB

Data Source Description:

CAS Student

Report Properties

Report Description:

CAS Student

*Report Status:

Active

*Report Category ID:

ALLUSER

All PeopleSoft User

Object Owner ID:

Admissions - UK

*Template Type:

RTF

Retention Days:

Registered Date/Time:

25/03/2010 13:27:46

Registered By:

PS

Updated Date/Time:

25/03/2010 13:27:46

Updated By:

PS

Download:

[Data Schema](#)

[Sample Data](#)

Definition page for CASB

This example shows the Template page for CASB:

Definition

Template

Output

Properties

Security

Bursting

Report Name: CASB

Template

Find | View All

First

1 of 1

Last

Template ID:

CASB_1

☒ Default Template

+

-

Description:

*Language Code:

English

Channel:

Email

Template Files

Find | View All

First

1 of 1

Last

Effective Date:

25/03/2010

+

-

*Status:

Active

Template File:

CASB.rtf

Upload

Preview

☐ Use Alt. XML

Template page for CASB

Defining Standard Letters

Access the Standard Letters page (Campus Community, Communications, Set up Communications, Standard Letter Table).

Create standard letters for applicants and students. Select Report Name to add the details.

This example shows the Standard Letters page for CSA:

Standard Letters

Letter Code

CSA

*Description

CAS Applicant

Short Description

CAS Applic

Set Letter Code

Processing Letter Details

*Function

CAS Notification

Applicable to

☒ Persons

☐ Organization

*Letter Type

Softcopy

*Letter Printed Data

All

SQC Name

☒ Joint Communications Allowed

☐ Include Enclosures

☒ Define Comm Gen Parameters

Template Selection

Find | View All

First 1 of 1 Last

Report Name

CASA

CAS Applicant

View Report Definition

Data Source ID

CASA

Template List

Customize | Find

First 1 of 1 Last

Template ID	Description	Language	Method	Default Template
CASA_1		English	E-Mail	☒

Standard Letters page for CSA

This example shows the Standard Letters page for CSB:

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715

Standard Letters

Letter Code CSB

*Description CAS Student Short Description CAS Studen

Set Letter Code ▼

Processing Letter Details

*Function CAS Notification ▼

Applicable to ☒ Persons ☐ Organization

*Letter Type Softcopy ▼

*Letter Printed Data All ▼ SQC Name

☒ Joint Communications Allowed

☐ Include Enclosures

☒ Define Comm Gen Parameters

Template Selection

Find | View All First ◀ 1 of 1 ▶ Last

Report Name CASB CAS Student [View Report Definition](#) + -

Data Source ID CASB

Template ID	Description	Language	Method	Default Template
CASB_1		English	E-Mail	☒

Standard Letters page for CSB

Defining Communication Contexts

Access the Communications Context page (Campus Community, Communications, Set up Communications, Communications Context Table).

Create communication contexts for applicants and students.

This example shows Communications Context page for CASA:

Communication Context

Academic Institution: PSUNV PeopleSoft University

Communication Context: CASA

Communication Context Description			
*Effective Date:	25/03/2010	*Status:	Active
*Description:	CAS Applicant		
Short Desc:	CAS Applic		

Communication Context Method			
*Method	*Direction	Letter Code	Description
E-Mail	Outgoing Communication	CSA	CAS Applicant

Add

Communications Context page for CASA

This example shows Communications Context page for CASB:

Communication Context

Academic Institution: PSUNV PeopleSoft University

Communication Context: CASB

Communication Context Description			
*Effective Date:	25/03/2010	*Status:	Active
*Description:	CAS Student		
Short Desc:	CAS Studen		

Communication Context Method			
*Method	*Direction	Letter Code	Description
E-Mail	Outgoing Communication	CSB	CAS Student

Add

Communications Context page for CASB

Defining Communication Categories

Access the Communications Category page (Campus Community, Communications, Set up Communications, Communications Category Table).

Create communication categories for applicants and students using the CASN administrative function and the communication contexts created in the previous step.

This example shows the Communications Categories page for CASA:

Communication Categories

Academic Institution:

PSUNV

PeopleSoft University

Communication Category:

CASA

Communication Category Description

Find | View All

First 1 of 1 Last

*Effective Date:

25/03/2010

*Status:

Active

+ -

*Description:

CAS Applicant

Short Description:

CAS Applic

*Function:

CASN

CAS Notification

Communication Context

*Context	Description
CASA	CAS Applicant

-

Add

Communications Categories page for CASA

This example shows the Communications Categories page for CASB:

Communication Categories

Academic Institution:

PSUNV

PeopleSoft University

Communication Category:

CASB

Communication Category Description

Find | View All

First 1 of 1 Last

*Effective Date:

25/03/2010

*Status:

Active

+ -

*Description:

CAS Student

Short Description:

CAS Studen

*Function:

CASN

CAS Notification

Communication Context

*Context	Description
CASB	CAS Student

-

Add

Communications Categories page for CASB

Defining Communication Speed Keys

Access the Speed Key Table page (Campus Community, Communications, Set up Communications, Speed Key Table).

Create speed keys for applicants and students using the CASN administrative function and the communication contexts and categories created in the previous steps.

This example shows the Communications Speed Keys page for CASA and CASB:

Communication Speed Keys

Institution: PSUNV PeopleSoft University
Function: CASN CAS Notification

Comm Key Detail Find | View 1 First 1-2 of 2 Last

***Comm Key:** CASA ☐ Print Comment ☐ Activity Completed ☐ Unsuccessful Outcome

***Description:** CAS Applicant

Short Desc: CAS Applic

***Category:** CASA CAS Applicant

***Context:** CASA CAS Applicant

Duration:

***Method:** E E-Mail **Direction:** OUT **Letter Code:** CSA

Comments: Comment for CASA applicant

***Comm Key:** CASB ☒ Print Comment ☐ Activity Completed ☐ Unsuccessful Outcome

***Description:** CAS Student

Short Desc: CAS Studen

***Category:** CASB CAS Student

***Context:** CASB CAS Student

Duration:

***Method:** E E-Mail **Direction:** OUT **Letter Code:** CSB

Comments: Comment for CAS student

Communications Speed Keys page for CASA and CASB

Defining Communication 3C Groups

Access the Communication 3C Groups page (Campus Community, Communications, Set up Communications, Communication 3C Groups).

Define the new categories for the appropriate Communication 3C Groups for the user depending on your institution's group setup (Set Up SACR, User Defaults, User 3C Group Summary).

This example shows the Communication 3C Groups page for CASA:

Communication 3C Groups

Institution: PSUNV PeopleSoft University
Category: CASA CAS Applicant
Function: CAS Notification

Update/Inquiry Group		
*Group	Description	
GRAD	Graduate Admissions	[-]
UGAD	Undergraduate Admissions	[-]

Communication 3C Groups page for CASA

This example shows the Communication 3C Groups page for CASB:

Communication 3C Groups

Institution: PSUNV PeopleSoft University
Category: CASB CAS Student
Function: CAS Notification

Update/Inquiry Group		
*Group	Description	
SREC	Student Records	[-]

Communication 3C Groups page for CASB

Creating Event Definitions

Access the Event Definition page (Campus Community, 3C Engine, Set Up 3C Engine, Event Definition).

Define events using the CASN administrative function and communication keys defined in previous steps. Additional communications, comments or checklists can be added to the events if required.

This example shows the Event Definition page for CASA:

Event Definition

Academic Institution: PeopleSoft University

Event ID: CASA

Event Detail

Find | View All

First 1 of 1 Last

*Effective Date: 25/03/2010

*Status: Active

*Description: CAS Applicant

*Short Description: CAS Appl

*Function: CASN

CAS Notification

Communications

*Comm Key: CASA

CAS Applicant

Detail

Comments

*Comment Category:

Detail

Checklists

*Checklist Code:

Detail

Update Status

Event Definition page for CASA

This example shows the Event Definition page for CASB:

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Event Definition

Academic Institution: PeopleSoft University

Event ID: CASB

Event Detail

Find | View All First 1 of 1 Last

*Effective Date: 25/03/2010

*Status: Active

*Description: CAS Student

*Short Description: CAS Studen

*Function: CASN CAS Notification

☐ User Selection

[Variable Data Joint Rules](#)

Communications

*Comm Key: CASB CAS Student

[Detail](#)

Comments

*Comment Category:

[Detail](#)

Checklists

*Checklist Code:

[Detail](#)

☐ Update Status

Event Definition page for CASB

Defining Event 3C Groups

Access the Event 3C Groups page (Campus Community, 3C Engine, Set Up 3C Engine, Event 3C Groups).

Define the new event IDs for the appropriate Communication 3C Groups for the user depending on your institutions group setup (Set Up SACR, User Defaults, User 3C Group Summary).

This example shows the Event 3C Groups page for CASA:

Event 3C Groups

Academic Institution: PSUNV PeopleSoft University

Event ID: CASA CAS Applicant

Function: CAS Notification

Update/Inquiry Group

*Group	Description		
GRAD	Graduate Admissions	+	-
UGAD	Undergraduate Admissions	+	-

Event 3C Groups page for CASA

This example shows the Event 3C Groups page for CASB:

Event 3C Groups

Academic Institution: PSUNV PeopleSoft University

Event ID: CASB CAS Student

Function: CAS Notification

Update/Inquiry Group	
*Group	Description
SREC	Student Records

Event 3C Groups page for CASB

See Also

"Generating PBI Communications" section in this chapter.

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, "Setting Up Communications"

Creating and Maintaining CAS Details

You can use the CAS Maintenance component to create and update CAS records.

The CAS Maintenance component has a CAS Details page and a Report Details page. Use the pages to enter upload, update and report extract field values at the application or student career level.

This section discusses how to:

- Create new CAS records.
- Review existing CAS records.
- Enter or update PBI upload/update data.
- Enter or update PBI report data.

Pages Used to Create and Maintain CAS Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CAS Details	SAD_PB_CAS	• Student Admissions, PBI Processing , CAS Maintenance, CAS Details • Student Admissions, Application Entry, CAS Maintenance • Student Admissions, Application Maintenance, Maintain Applications, Application Program Data, CAS Details • Records and Enrollments, Career and Program Information, Student Program/Plan, Student Program , CAS Details	Enter or update upload and update field values for a CAS Details record at the application or student program level
Report Details	SAD_PB_CASREPDTLS	• Student Admissions, PBI Processing , CAS Maintenance, Report Details • Student Admissions, Application Entry, CAS Maintenance • Student Admissions, Application Maintenance, Maintain Applications, Application Program Data, CAS Details, Report Details • Records and Enrollments, Career and Program Information, Student Program/Plan, Student Program , CAS Details, Report Details	Enter or update report field values for a CAS Details record at the application or student career level.

Creating New CAS records

You can use the CAS Maintenance component to add new CAS Details records.

Applicants

New CAS records can be added for applicants that require a student visa using the CAS Maintenance component. You can access this component from the Applicant Entry or PBI Processing menus or by clicking the CAS Details link on the Application Program Data page in the Maintain Applications component. Select a record type of Applicant to add a new record.

Continuing Students

New CAS records can be added for continuing students that require an extension to an existing visa. To add new CAS records for continuing students use the CAS Maintenance component from the menus or click the CAS Details link on the Student Program page. Select a record type of Student to add a new record.

Adding CAS Records

Add a CAS record for each CAS request. You can add multiple CAS records for an application or student program record. In such a case, the system defaults the record number to 1 for the first CAS record and increments the record number as you add new records for the application or student program record.

Note that the Import CAS Details and the Import Applicant Data processes can also create new CAS records.

See the "Importing CAS Details" section in this chapter.

See the "Setting Up UCAS and GTTR Options" section in the *(GBR) Managing UCAS and GTTR Applications* chapter.

Reviewing Existing CAS records

You can use the CAS Maintenance component to search for existing CAS Details records.

Search for existing records by entering criteria on the search page. The search values for Academic Institution, Academic Career and Admit Term are defaulted from the values defined on the User Defaults pages.

Records with a particular Upload, Update or Report Status can be selected by adding a value in the Processing Status field. For example, select Update Complete in the Processing Status field of the search page to search for records that the Create Extract process has included in an Update extract.

Note. To allow records to be searched for using the Processing Status field it is recommended that distinct status values are defined for Upload, Update and Extract. Refer to the "Setting up CAS Statuses" section in this chapter for more information.

For users to have access to CAS records for applications of particular application centers using the Application Entry menu, you must grant the users access to these application centers via the Application Center Security page.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Recruiting and Admissions".

Security is not applied when the record type is *student* or when records are accessed using the PBI Processing menu.

Entering PBI Data for Applicants or Students

Access the CAS Details page (Student Admissions, PBI Processing, CAS Maintenance, CAS Details).

CAS Details		Report Details	
Name:	Wendy Cambell-Rice	ID:	0190 Personal Information
Academic Institution:	PeopleSoft University	Record Type:	Applicant Maintain Applications
Academic Career:	Undergraduate	Student Career Nbr:	0
Record Number:	3	Residency	Home/United Kingdom
Application Number:	00024804	Program Number:	0
Academic Program:	Fine Arts Undergraduate	Campus:	Main Hacienda Campus
Admit Term:	2011 Fall	Academic Load:	Full-Time

CAS Status		Find View All		First 1 of 2 Last	
Effective Date:	18/03/2011	*Effective Sequence:	2		
Upload Status:	New	Upload File ID:			
CAS Number:	E4G7TA2A09EA12	Export File ID:	Export_1803b		
CAS Status:	Assigned	CAS Status Date:	18/03/2011		
Update Status:		Update File ID:			
User ID	SATRN11	Dockett,Darnell James			
▶ Applicant Details					
▶ Course Details					
▶ Financial Details					
▶ Documentation					
▶ Sponsor Notes					

CAS Details page

You can use the CAS Details page to view a CAS record's history of changes throughout its processing cycle. Each history change record has a unique Effective Date and Sequence Number combination.

Personal Information

Click to navigate to the Biographical Details page of the Add/Update a Person component.

Upload Status

Identifies whether the record has been identified as:

- Newly added (New or blank)
- To be included in the Upload extract (Upload Ready)
- Included in the Upload extract (Upload Complete)

Once the CAS Number and Status have been imported the system makes this field non-editable.

Upload File ID

Displays the File ID generated when the record is included in the Upload extract.

CAS Number, Export File ID, CAS Status, and CAS Status Date	Displays the values imported using the Import CAS Details process. The CAS Number field is used to derive the corresponding field in the Update and Report extracts.
Update Status	Identifies whether the record has been identified as: • Requiring inclusion in the Update extract (Update Required) • To be included in the Update extract (Update Ready) • Included in the Update extract (Update Complete) The system enables this field once the CAS Number and Status has been imported and the CAS Status is Assigned. Once the CAS Status is updated to one of the post-assigned values, for example, <i>Used</i>, the field becomes non-editable. Once the CAS Status is Assigned, the system will automatically update the Update Status to Update Required when changes are made to the Course Fees Paid, Accommodation Fees Paid or Boarding Fees paid values.
Update File ID	Displays the File ID generated when the record is included in the Update extract. If the record is included in multiple Update extracts the most recent Update File ID is displayed in the current effective date/sequence record.
User ID	Indicates the User ID and name of the user who last updated the record. If the Create Extract Data or Import CAS Details process updated the record, the User ID field indicates the user who ran the process.

Applicant Details

The following is an example of the Applicant Details region on the CAS Details page.

▼ Applicant Details

Date of Birth:

19/08/1984

☐ Report Year/Month Only

Gender:

Female

UCAS Personal ID:

[1071001905](#)

Birth Country:

Australia

Birth Location:

Perth

Nationality:

Australia

Passport Number:

A9384753897

Partner Institution:

Overseas Institution:

Swinburne Uni Technology, PO Box 218, Hawthorn, AUS

Applicant Details region — CAS Details page

Report Month/Year Only	Select to include the date of birth in CCYY-MM format in the Upload extract
Report Year Only	Select to include the date of birth in CCYY format in the Upload extract.

UCAS Personal ID

Displays the value imported from UCAS.

The system selects this value from External System ID records with ID type UC or UP. The most recent effective dated record is displayed. The same value is derived for the corresponding field in the Upload extract when the record type is Applicant.

Click the link to navigate to the UCAS Applicant Summary page.

Note. The GTTR Personal ID is not included in the CAS Details page. Therefore, the UCAS Personal ID link is not functional for GTTR applicants. To access a GTTR application, select the Maintain Applications link on the header region of the CAS Details page, and then select the Personal ID link on the Application Program Data page.

Nationality

Displays the country value of the non-EU Citizenship record for the applicant or student.

Select Nationality

Click if you want to change the default value or select a new value for the Nationality field.

If multiple non-EU Citizenship records exist on the Campus Community Citizenship/Passport page, then the record with the lowest country code is displayed by default in the Nationality field and the link is displayed to allow an alternative record to be selected.

Passport Number

Displays the passport number of the record associated with the Citizenship record displayed in the Nationality field.

Select Passport

Click if you want to change the default value or select a new value for the Passport field.

If multiple Passport records exist on the Campus Community Citizenship/Passport page for the selected Nationality , then the passport record with the most recent Issue Date is displayed by default in the Passport Number field and the link is displayed to allow an alternative record to be selected. Passport records with an Expiration Date in the past are not considered.

Partner Institution and Overseas Institution

The system automatically populates this field when a new CAS record is created. The value is populated from the Academic Plan PBI data page if a value is defined for the Academic Plan of the application or student career. If a value is not defined for the Academic Plan, the value is populated from the Academic Program PBI data page if a value is defined for the Academic Program of the application or student career.

Enter an external ID value if the value has not been set up on the Academic Program or Plan PBI data pages or if you want to enter a different value for the applicant or student.

The Overseas Institution prompt is restricted to organizations where the primary location has a country other than GBR.

Course Details

The following is an example of the Course Details region on the CAS Details page.

▼ Course Details			
Academic Plan:	PSYCH Psychology	Reported Plan:	
Course Title Override	BSC Psychology		
Main Site of Study:	Hacienda	Reported Site:	
Academic Level:	NQF Level 7 ▼	Secondary Academic Level:	
Course Start Date:	13/12/2010	Expected End:	31/07/2014
Latest Acceptance:	13/12/2010	Months Duration:	
Full-Time Course:	Yes ▼	Course Hours:	
Work Placement:	No ▼	Placement Organisation:	

Course Details region — CAS Details page

Academic Plan

For record type *Applicant*, if multiple plans exist in the Application Plan Data record, the field displays the plan code which is alphabetically lowest.

For record type *Student*, if multiple plans exist in the Student Program/Plan record, the field displays the plan code which has lowest sequence number

Reported Plan

Select an alternative plan if the required value is different to the default value displayed in the Academic Plan field. This value will be used in place of the Academic Plan in deriving values in the Upload extract.

Course Title Override

Enter the course title that the system uses in the Upload extract. The system uses this value in place of the subplan level values or plan level values in the Upload extract.

Main Site of Study

Displays the value defined for your institution from the PBI Configuration page. If no value is defined in the configuration record the field displays the primary Location of the Campus displayed for the applicant or student.

Displays the value defined for your institution from the PBI Configuration page. If no value is defined in the configuration record the field displays the primary Location of the Campus displayed for the applicant or student.

Reported Site

Select an alternative Location if the required value is different to the default value displayed in the Main Site of Study field. This value will be used in place of the Main Site of Study value in deriving the Main Site address fields in the Upload extract.

Academic Level

The system automatically populates this field when a new CAS record is created. The value is populated from HESA Plan Data page if a COURSEAIM value is defined for the Academic Plan of the application or student career.

If a value is not defined for the Academic Plan, the value is populated from the HESA Program Data page if a COURSEAIM value is defined for the Academic Program of the application or student career.

The first letter of the COURSEAIM value is translated to an NQF level as follows: D (doctoral) = 8, M (masters) = 7, H (honours) = 6, I (intermediate) = 5, C (certificate) = 4.

Enter a value if a COURSEAIM value has not been set up on the HESA data pages or if you want to enter a different value for the applicant or student.

Secondary Academic Level

Select a secondary NQF level if required.

NQF values for this field and Academic Level are delivered as translate values with the system (SAD_PB_ACAD_LEVEL). You can define additional translate values for qualification types if required.

Course Start Date

The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page, (c) PBI Configuration page or (d) the term begin date of the Admit Term.

You can override the default value.

Expected End Date

The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page, (c) PBI Configuration page or (d) the end date of the Expected Graduation Term.

You can override the default value.

Latest Acceptance Date

The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.

You can override the default value. The value must be on or after the Course Start Date and on or before the Expected End Date.

Months Duration

The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page.

You can override the default value by entering a number in the range of 0 and 99.

This field is informational only and is not included in the Upload, Update or Report extract.

Full-Time Course	If the Academic Load field displays Full-Time, the system automatically populates the value Yes when a new CAS record is created.
Course Hours	The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page or (b) Academic Program PBI Data page. You can override the default value by entering a decimal value in the range of 0.0 and 168.0.
Work Placement	The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. You can select a different value if required.
Placement Organization	Enter an external ID value if required. This field is available for edit only if you select Yes in the Work Placement field.

Financial Details

The following is an example of the Financial Details region on the CAS Details page.

Financial Details

Accommodation Provided:

No

First Year Course Fees:

9500.00

Accommodation Fees Included:

No

First Year Boarding Fees:

2500.00

Course Fees Paid:

Accommodation Fees Paid:

Boarding Fees Paid:

Financial Details region — CAS Details page

Accommodation Provided	The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. You can select a different value if required.
First Year Course Fees	The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the admit term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page. If no value is defined for the admit term, then the field value defaults to zero. You can override the value by entering a number in the range of 0.00 to 1,000,000.

Course Fees Paid

Enter a number in the range of 0.00 to 1,000,000.

You cannot enter a value greater than the First Year Course Fees, if the First Year Course Fees field has a value greater than zero.

If the CAS Status is *Assigned* the Update Status value is updated to Update Required when the value for this field is updated.

If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.

Accommodation Fees Included

The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.

You can select a different value if required.

Accommodation Fees Paid

Enter a number in the range of 0.00 to 1,000,000.

You cannot enter a value greater than the First Year Course Fees, if the First Year Course Fees field has a value greater than zero.

If the CAS Status is *Assigned* the Update Status value is updated to Update Required when the value for this field is updated.

If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.

First Year Boarding Fees

The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the admit term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.

If no value is defined for the admit term, then the field value defaults to zero.

You can override the value by entering a number in the range of 0.00 to 1,000,000.

Boarding Fees Paid

Enter a number in the range of 0.00 to 1,000,000.

You cannot enter a value greater than the First Year Boarding Fees, if the First Year Boarding Fees field has a value greater than zero.

If the CAS Status is *Assigned* the Update Status value is updated to Update Required when the value for this field is updated.

If you leave the field blank, the Create Extract process derives zero for the field in the Upload extract.

Documentation

The following is an example of the Documentation region on the CAS Details page.

▼ Documentation

Offer Documents:

Transcript of High School Diploma

ATAS Certificate Required:

No

Dean's Certificate Required:

No

Documentation region — CAS Details page

- Offer Documents

Enter a value up to a maximum of 2000 characters.
The value is used to derive the DocumentsUsedToObtainOffer field in the Upload extract.
- ATAS Certificate Required

The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.
You can select a different value if required.
- Dean's Certificate Required

The system automatically populates this field when a new CAS record is created. The value is populated from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.
You can select a different value if required.

Sponsor Notes

The following is an example of the Sponsor Notes region on the CAS Details page.

▼ Sponsor Notes

*Date:

26/08/2010

*Notes:

Sponsor Note

Find

First

1 of 1

Last

Sponsor Notes region — CAS Details page

To notify UKBA of corrections to the applicant data, an institution adds Sponsor Notes to a CAS record through SMS. You can use Notes field to enter the same notes to a CAS record in the system. This enables you to maintain the Sponsor Notes locally. The system does not include the Notes field value in the Upload extract data.

Entering PBI Report Data for Applicants or Students

Access the Report Details page (Student Admissions, PBI Processing, CAS Maintenance, Report Details).

[New Window](#) | [Customize Page](#) |

CAS Details		Report Details	
Name:	Jonathon Redmond	ID:	ADM1010 Personal Information
Academic Institution:	PeopleSoft University	Record Type:	Applicant Maintain Applications
Academic Career:	Undergraduate	Student Career Nbr:	0
Record Number:	1	Residency	Home/United Kingdom
Application Number:	00024725	Program Number:	0
Academic Program:	Liberal Arts Undergraduate	Campus:	Main Hacienda Campus
Admit Term:	2014 Fall	Academic Load:	Full-Time

[Find](#) | [View All](#) | First **1** of 1 Last

Effective Date:	22/02/2011	Effective Sequence:	1
Report Status:	Report Ready ▼	Report File ID:	
Expected Enrollment:	25/02/2011		
Notes:			

Report Details page

Report Status

Identifies whether the record has been identified as:

- To be included in the Report extract (*Report Ready*).
- Included in the Report extract (*Report Complete*).

You can set report status to *Report Ready*, only if the CAS Number is populated and the CAS Status of the record is *Used*.

Report File ID

Displays the File ID generated when the record is included in the Report extract.

Expected Enrollment

The system automatically populates this field when a new CAS record is created. The value is populated based on the value defined for the Admit Term from (a) Academic Plan PBI Data page, (b) Academic Program PBI Data page or (c) PBI Configuration page.

You can override the default value. The value must be on or before the Latest Acceptance Date defined on the Course Details region of the CAS Details page.

Notes

Enter a value up to a maximum of 2000 characters.

The value is used to derive the Notes field for the Report extract.

Updating Multiple CAS Records

Use the CAS Record Update process if you want to update a group of CAS records in Campus Solutions at the same time. You can select the group of CAS records based on selection criteria, including:

- Academic career, program or plan.
- Students or applicants.
- Admit term.
- Upload, Update or Report status.

This section discusses how to update multiple CAS Records.

Note. This process can only be used to update multiple CAS records with a single value per field. Updates that require a different value for each CAS record, for example updates to Course Fees Paid that may vary by applicant or student, should be made using the CAS Details page.

Page Used to Update Multiple CAS Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CAS Record Update	SAD_PB_CAS_UPD	Student Admissions, PBI Processing , CAS Record Update	Update multiple CAS records.

Updating Multiple CAS Records

Access the CAS Record Update page (Student Admissions, PBI Processing, CAS Maintenance, Report Details).

CAS Record Update

Run Control ID: NG01

Report ManagerProcess MonitorRun

Selection Criteria

*Academic Institution:PSGBRPeopleSoft University UK

Academic Career:UGRDUndergraduate

Academic Program:BABachelor of Arts

Academic Plan:

Admit Term:20902009-2010 Academic Year

Record Type:Applicant

Upload Status:New

Update Status:

Report Status:

Population Selection

Selection Tool:PS QueryEdit Prompts

Query Name:SAD_PB_CAS_RECORD_UPDATELaunch Query ManagerPreview Selection Results

CAS Record Update page (1 of 2)

New Value Details

Effective Date:20/04/2010

Statuses

Upload Status:Upload Ready

Update Status:

Report Status:

Course Details

Course Start Date:

Expected End Date:

Latest Acceptance Date:

Expected Enrollment Date:

Fee Details

First Year Course Fees:

First Year Boarding Fees:

Course Fees Paid:

Accommodation Fees Paid:

Boarding Fees Paid:

CAS Record Update page (2 of 2)

Use the Selection Criteria region to specify the group of CAS records that you want to update.

Use the Population Selection region to further filter the records that are selected for update by selected a PS Query value.

Use the New Value Details region to specify the values that are updated by the process.

Population Selection

Population selection is a method of selecting the IDs to process a specific transaction. The Population Selection group box appears on the run control pages when the Population Selection process is available or required for the transaction.

The system writes the CAS records returned from any query specified under Population Selection to SAD_PB_CAS_RES. The query must return the following values to uniquely identify the CAS records that need to be updated:

- EMPLID
- INSTITUTION
- SAD_PB_REC_TYPE
- ACAD_CAREER
- STDNT_CAR_NBR
- SAD_PB_REC_NUMBER
- ADM_APPL_NBR (blank for record type = student)
- APPL_PROG_NBR (blank for record type = student)

For each distinct CAS record, the query automatically selects the most recent effective dated/sequenced row for further filtering before the process creates a new row.

A sample query, SAD_PB_CAS_RECORD_UPDATE, has been delivered. This query selects the most recent effective dated rows for all the CAS records of an institution.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, "Using the Population Selection Process"

After specifying the changes on the New Value Details region, when you run the process:

1. The process selects the CAS records based on the specified criteria.
2. In each CAS record, it inserts a new row with an effective date equal to the Effective Date parameter value or, if the most recent row has the same effective date as the Effective Date parameter value, the sequence number is incremented.
3. In the new row, the process makes the changes based on the parameters you specified on the New Value Details region. The rest of the fields in the new row contain the values from the previous row.

The following table describes how the CAS Record Update process determines whether or not to update a CAS record value:

Process Parameter	Conditions
Effective Date	If the most recent existing CAS record row has an effective date later than the parameter value, the process logs a message and skips the update for that record.
Upload Status	Only updated if the Upload Status field is enabled in the CAS record, that is the CAS Number is not populated.
Update Status	Only updated if the Update Status field is enabled in the CAS record, that is the CAS Number is populated and the CAS Status is blank or <i>Assigned</i> .
Report Status	No conditions.
Course Start Date	No conditions.
Expected End Date	Only updated if the date is after the new/existing Course Start Date.
Latest Acceptance Date	Only updated if the date is after the new/existing Course Start Date and is before the new/existing Expected End Date.
Expected Enrollment Date	Only updated if the date is not after the new/existing Latest Acceptance Date.
First Year Course Fees	Only updated if the value is greater than zero.
First Year Boarding Fees	Only updated if the value is greater than zero.
Course Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Course Fees value.
Accommodation Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Course Fees value.
Boarding Fees Paid	Only updated if the value is greater than zero and is not greater than the new/existing First Year Boarding Fees value.

If any of Course Fees Paid, Accommodation Fees Paid or Boarding Fees Paid is updated and the Update Status field is currently enabled then the Update Status is updated to the value defined for 'Update Required' in the PBI configuration record, unless a new Update Status is specified in the Statuses region in which case that value is used for the update.

There is no validation applied to updates to Course Fees Paid, Accommodation Fees Paid or Boarding Fees Paid to check that the Update Status field is enabled. Values for the fields will be updated even if the Update Status in the CAS Details record is disabled following the update of the CAS Status to one of the post-assigned values. You should ensure that updates to the three Fees Paid fields are only made for records where the Update Status field is enabled.

Generating an XML File to Send to SMS

This section discusses how to:

- Generate an extract.
- Review an extract.
- Create an XML file from an extract.
- Validate an XML file.

Pages Used to Generate an XML file to send to SMS

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Extract Data	SAD_PB_CRT_EXT	Student Admissions, PBI Processing , Create Extract Data	Generate the Upload, Update, or Report extract data.
Upload Extract Data	SAD_PB_UPL_EXT	Student Admissions, PBI Processing , Upload Extract Data	Review and edit the upload extract data.
Update Extract Data	SAD_PB_UPD_EXT	Student Admissions, PBI Processing , Update Extract Data	Review and edit the update extract data.
Report Extract Data	SAD_PB_REP_EXT	Student Admissions, PBI Processing , Report Extract Data	Review and edit the report extract data.
Create XML	SAD_PB_GXML	Student Admissions, PBI Processing, Create XML	Generate the XML file from the extract data.
Validate XML	SAD_PB_VALX_PRC	Student Admissions, PBI Processing, Validate XML	Validate the XML file.

Generating an Extract

Access the Create Extract Data page (Student Admissions, PBI Processing, Create Extract).

Create Extract Data

Run Control ID: **EXTRACT02**

[Report Manager](#)[Process Monitor](#)

Run

PBI Extract

Academic Institution

PSUNV

☒ Create Upload

☒ Include Applicants

☐ Create Update

☒ Include Students

☐ Create Report

Upload File ID Override

Update File ID Override

Report File ID Override

Create Extract Data page

Create Upload

Select to create Upload extract data. If you select this check box, the process selects CAS Details records with an Upload status of *Upload Ready*.

Create Update

Select to create the Update extract data. If you select this check box, the process selects CAS Details records with an Update status of *Update Ready*.

Create Report

Select to create the Report extract data. If you select this check box, the process selects CAS Details records with a Report status of *Report Ready*.

Include Applicants

Select to create extract data for only applicants. If you select this check box, the process selects CAS Details records with record type *Applicant*.

Include Students

Select to create extract data for only students. If you select this check box, the process selects CAS Details records with record type *Student*.

Note. You should not clear both the Include Applicants and the Include Students check boxes. You must select one of the check boxes to run the process. Also, you can select both the check boxes to include both applicant and student records.

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Upload File ID Override

If you do not enter an override value, the process automatically generates a value in the format INST_UPLOAD_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date. For example, a File ID of PSUNV_UPLOAD_2010_06_26_01 will be generated for the first upload extract for institution PSUNV on the 26th June 2010.

Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Update or Report extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.

Update File ID Override

If you do not enter an override value, the process automatically generates a value in the format INST_UPDATE_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date.

Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Upload or Report extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.

Report File ID Override

If you do not enter an override value, the process automatically generates a value in the format INST_REPORT_YYYY_MM_DD_nn where INST is your institution code and nn is a sequence number that begins 01 and is incremented for new runs of the extract process on that date.

Enter a File ID value to be used in place of the automatically generated value if required. The value must not have already been used for an Upload or Update extract. If an extract for the File ID entered has already been run any existing extract data records will be deleted before the process is re-run.

Create Upload check box

If the Create Upload check box is selected, CAS Details records with an Upload Status of *Upload Ready* are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If an Upload File ID Override value is selected, any existing extract records are deleted before new records are selected.

If you have selected both Include Applicants and Include Students check boxes, the process includes one record for each applicant or student. If there is more than one CAS Details record with an Upload Status of *Upload Ready*, the first record selected is included and a message is logged for any subsequent records selected by the process. The additional records can be included in a future extract or the Upload Status can be set to the appropriate status to prevent the record from being included if a second CAS request is not required.

After a CAS Details record is included by the process, a new effective dated record is created to set the Upload Status to *Upload Complete* and to populate the Upload File ID.

Create Update check box

If the Create Update check box is selected, CAS Details records with an Update Status of *Update Ready* and the CAS Number populated are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If an Update File ID Override value is selected any existing extract records are deleted before new records are selected.

The same value is derived for each record in the Upload extract for the Update File ID field.

After a CAS Details record is included by the process, a new effective dated record is created to set the Update Status to *Update Complete* and to populate the Update File ID.

If an Event ID is set up on the PBI Configuration page for Record Type = *Applicant* or *Student* and Notification Type = *Fee Update*, the process creates the 3C Engine Trigger result for the Event ID and person. See the "Generating PBI Communications" section for steps that you should perform after the process creates the 3C Engine Trigger result.

Create Report check box

If the Create Report check box is selected, CAS Details records with a Report Status of *Report Ready* and the CAS Number populated are selected. The process selects applicant records, if the Include Applicants check box is selected. The process selects student records, if the Include Students check box is selected. If you have selected both the Include Students and Include Applicants check boxes, the process selects both applicant and student records.

If a Report File ID Override value is selected any existing extract records are deleted before new records are selected.

The same value is derived for each record in the Upload extract for the Report File ID field.

After a CAS Details record is included by the process, a new effective dated record is created to set the Report Status to *Report Complete* and to populate the Report File ID.

See the "(GBR) PBI Field Derivation" appendix for information about the derivation of each field in the extract.

Reviewing an Extract

Use the Upload Extract Data, Update Extract Data, and Report Extract Data pages to review the extract data that the Create Extract process has generated prior to creating the XML file.

Upload Extract Data

Applicant ID: SR5000 Sandra Ross Extract Date: 19/04/2010

Upload File ID: PSUNV_UPLOAD_2010_04_19_01 ☐ Exclude from XML

▼ File Details				
Field	Derived Value	Derivation Step	Reported Value	Derived Value Overridden
Schema ID	T4General Ready To Go	1	T4General Ready To Go	☐
Tier ID	Tier 4	1	Tier 4	☐
Category	General	1	General	☐
Sponsor Licence Number	H87485777	2	H87485777	☐

▼ Applicant Details				
Field	Derived Value	Derivation Step	Reported Value	Derived Value Overridden
UCAS Personal ID		2		☐
Application ID	000226090	1	000226090	☐
Family Name	Ross	1	Ross	☐
Given Name	Sandra	1	Sandra	☐
Other Names		2	Alison	☒
Nationality	AUS	1	AUS	☐
Gender	2	1	2	☐
Country of Birth	AUS	1	AUS	☐
Place of Birth	Sydney	1	Sydney	☐
Date of Birth	1981-04-15	1	1981-04-15	☐
Applicant Passport/Travel Document Number	58640967907	1	58640967907	☐

Upload Extract Data page (part)

Exclude from XML

Select to prevent an individual record from being included in the XML file when the Create XML process is run for the File ID.

Reported Value

Displays the derived value for the field. You can change this value if a different value is required in the XML file to be sent to SMS.

If the derived value is overwritten in the extract data you should ensure that the corresponding data in the CAS Details record is also updated.

In cases where both General and Child category records are included in the upload extract data the Schema ID and Category values can be overridden for the Child records in the Reported Value field.

Derived Value Overridden

The system automatically selects the check box if you use the Reported Value field to change the derived value.

Creating an XML File from an Extract

Access the Create XML page (Student Admissions, PBI Processing, Create XML).

Create XML

Run Control ID: NG01

[Report Manager](#) [Process Monitor](#)

Run

Process Instance:1243

PBI Extract

*Academic Institution:

PSUNV

PeopleSoft University

Extract Type:

Upload

Extract Date:

19/04/2010

*File ID:

PSUNV_UPLOAD_2010_04_19_01

*XML Path/File Name:

\\10.221.105.120\Temp\Upload_109101_01.xml

Create XML page

- Extract Type**

Select an extract type to filter the prompt values for the File ID field.
- Extract Date**

Select an extract date to filter the prompt values for the File ID field.
- File ID**

Select the extract that you want to process.

XML Path/File Name

Enter the file path and file name that you want the system to use to save the XML file. You must enter a valid directory path that maps to a folder with appropriate Read/Write permissions. If you cannot locate such a folder, consult your system administrator.

If defined the file name element must include the lower case .xml extension:

- Windows format - \\server\folder\filename.xml
- Unix format - //server/folder/filename.xml

If you enter the file path and do not specify the file name, the process uses the File ID value to name the XML file. The format without the file is as follows:

- Windows format - \\server\folder
- Unix format - //server/folder

Upload Extract XML

For the upload extract the process creates a separate XML file for each combination of the header fields found in the extract data for the File ID:

<BulkUploadFileId>

<SchemaID>

<TierID>

<Category>

<SponsorLicenceNumber>

In cases where there are multiple Sponsor Licence Numbers in the upload extract data multiple XML files are created. If there are both General and Child category records multiple XML files are created. If multiple XML files are required a sequence letter (A, B, C etc) is added to the file name to distinguish between the files.

For cases where the process is being re-run, if there is an existing file for the specified path/file name then that file is overwritten.

Update and Report Extract XML

A single XML file is created for each File ID for update and report extract data.

For cases where the process is being re-run, if there is an existing file for the specified path/file name then that file is overwritten.

Validating a XML File

Access the Validate XML page (Student Admissions, PBI Processing, Validate XML).

Validate XML

Run Control ID: NG01

[Report Manager](#) [Process Monitor](#) [Run](#)

Process Parameters

*XML Path/File Name: \\10.221.105.120\Temp\Upload_109101_01.xml

*XSD Path/File Name: \\10.221.105.120\Temp\BulkDataCommon-v1.1.xsd

Validate XML page

XML Path/File Name	Enter the path and file name of the XML file that you want to validate.
XSD Path/File Name	Enter the complete path and file name of the primary XSD file. The process uses all of the XSD files to validate your XML file. The XSD files are available from the UKBA website.

The process validates the XML and checks that it is well formed in the context of the defined schema.

If any errors are reported by the Validate XML process, correct the errors by amending the Reported Value in the Extract Data pages or by amending the CAS Details or related records.

If you have corrected the errors using the Extract Data pages, re-run the Create XML process and validate the file. If you have corrected the errors in the CAS Details or related records, re-run the Create Extract process, re-run the Create XML process and validate the file.

Once the XML file passes schema validation, submit the XML file to SMS via the UKBA portal.

Importing CAS Details

After you send one or more CAS number requests to SMS, use the Import CAS Details process to import the CAS details from the Bulk Export XML file retrieved from SMS.

When you run the process:

1. Initially it processes the XML file and creates CAS records in the staging tables.
2. Then it processes the staging table records to either update an existing CAS record with the CAS number and status details or create a new CAS record where you have submitted the CAS request directly via the UKBA portal.

Each CAS record in the staging table has an import status. The following table describes how the process determines which import status to assign to a CAS staging record.

Condition	Status Set By the Import Process
The status is initially set to this value for each new record imported to the staging table from the XML file.	New (N)
The import process did not find a matching CAS Details record.	Pending (P)
The import process encountered a problem when identifying a CAS Details record (for example, there is an existing CAS Details record but it is future dated).	Error (E)
The status is set to this value for each staging record where the corresponding CAS record has been created or updated with the imported CAS details.	Imported (I)

Use the CAS Staging Data pages to review the staging records that have Pending or Error status. For records with Pending status, you can use the CAS Staging Data page to match the record with an existing application or student program record and create a new CAS record. For records with Error status, you can use the CAS Details page to correct or update the existing records to allow the staging record to be re-processed.

This section discusses how to:

- Import and create CAS records in bulk.
- Review and edit the CAS staging data.

Pages Used to Import CAS Records

Page Name	Definition Name	Navigation	Usage
Import CAS Details	SAD_PB_IMPC_PRC	Student Admissions, PBI Processing, Import CAS Details	Import the CAS details from the Bulk Export XML file provided by SMS.
CAS Staging Data	SAD_PB_I_CAS	Student Admissions, PBI Processing, CAS Staging Data	Review the records that the Import CAS Details has loaded into the staging tables.

Importing CAS Details

Access the Import CAS Details page (Student Admissions, PBI Processing, Import CAS Details).

Import CAS Details

Run Control ID: ICD1 [Report Manager](#) [Process Monitor](#) [Run](#)

PBI Extract

*Academic Institution: PSUNV PeopleSoft University

XML Path/File Name: \\ntdc78229qaemt.us.oracle.com\PT8.51.03\appserv\EM_H900 [Add Attachment](#)

Import CAS Details page

Add Attachment

Click to browse to the XML file that you want to import, and click Upload.

You can browse your local drive and select a file. When you click Upload, the system automatically copies the file to the application server and the XML Path/File Name field automatically displays the server path and file name.

Note. The upload process creates a *files* subdirectory to store and process the XML files. This subdirectory is created in the server directory location that is specified in the PS_SERVDIR system parameter in the Application Server/Process Scheduler configuration file psappsrv.cfg/psprcs.cfg. Ensure that PS_SERVDIR is set up with an appropriate value in the configuration file and that users have the correct permission to access the files subdirectory.

XML Path/File Name

Enter the path and file name of the XML file that you want to import. You must store this XML file on an application server that the import process can access.

If you want to reprocess the staging records, leave the field blank.

Processing steps

The process performs the following steps to create new staging table records if the XML Path/File Name parameter has been provided:

1. Deletes any existing staging records with a status of *Imported*
2. Opens the XML file. If the XML file cannot be found a message is logged and the re-processing of any existing staging records continues.
3. Creates staging records with a status of *New* for each record found in the XML file.

The process then performs the following steps to process staging records that have an import status of *Pending* from a previous run of the process:

1. *Create*: If the application or student program details have been added via the CAS Staging Data page and there is no existing CAS Details record, a new record is created using the application or student program details added and the CAS Number, CAS Status, CAS Status Date and Export File ID from the staging record. The Upload Status is set to Upload Complete and the Nationality value is populated if a country value exists in the staging record.
2. *Update*: If the application or student program details have been added via the CAS Staging Data page and there is an existing CAS Details record without the CAS Number populated, a new effective dated record is created for the current date with the CAS Number, CAS Status, CAS Status Date and Export File ID from the staging record.
3. *Pending*: If the full application or student program details have not been added via the CAS Staging Data page a message is logged and the record remains with a status of Pending.
4. *Error*: If the applicant or student details have been added via the CAS Staging Data page and there is an existing CAS Details record with a different CAS Number already populated then an error message is logged and the status is set to Error.

The process performs the following step to process New staging records and Error records from a previous run of the import process:

1. *Update CAS Status*: If the staging record can be matched to an existing CAS Details record using Applicant ID (EMPLID) and CAS Number, a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record.

This processing will occur when the CAS Number has already been imported and the CAS Status is being updated from, for example, *Assigned* to *Used*.

Note. If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to Error.

2. *Update Applicant*: If Application ID is populated and the staging record can be matched to an existing applicant CAS Details record using Applicant ID (EMPLID) and Application ID (the combination of Admission Application Number and Application Program Number), a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record. This processing will occur when the CAS Number is being imported for the first time and the CAS request has been generated from an existing CAS Details record.

Note. If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to *Error*.

3. *Update Student*: If the Application ID is not populated and the staging record can be matched to an existing student CAS Details record using Applicant ID (EMPLID) and Course ID (either Academic Plan or Academic Sub-Plan if sub-plan reporting is enabled on the PBI Configuration page), a new effective dated record is created with the CAS Status, CAS Status Date and Export File ID from the staging record.

Note. If the most recent existing effective dated record is in the future or there are multiple matching records, a message is logged and the import status is set to *Error*.

4. *No Match*: If no match is made to an existing CAS Details record the status is set to Pending. The staging record can be reviewed via CAS Staging Data page and the application or student program details can be added to allow the record to be re-processed.

Assigning Event IDs to the Applicant or Student for CAS Number Notification

If you have defined an event ID for a notification type of *CAS Number* on the PBI Configuration page, the import process assigns the event ID when it creates a new CAS record or when it creates a new effective dated row for an existing CAS record and the CAS Number is being populated for the first time. If the process is updating an existing CAS record where the CAS number is already populated the Event ID is not created.

To assign the event details to the applicant or student, the process creates a results record in the 3C Engine Trigger Results table for Institution, Event ID and Function (CASN) for the applicant or student EMPLID. The variable data associated with the CASN administrative function (Academic Career, Student Career Number and CAS Number) are also populated.

See "Generating PBI Communications" section in this chapter.

Reviewing and Editing the CAS Staging Data

Access the CAS Staging Data page (Student Admissions, PBI Processing, CAS Staging Data).

CAS Staging Data			
Academic Institution	PSUNV	Export File ID	EXPORT_FILE_02
Import Status	Pending	Extract Date	19/03/2010
CAS Number	E4G7TA2A09C013		
CAS Status	ASSIGNED	CAS Status Date	19/03/2010
ID	SR13215	Date of Birth	1972-04-21
Family Name	JURGENS	Given Name	JEFF
Nationality	AUS	Passport Number	348648898
Application ID			
Course ID	HIST	Course Title	History
Course Start Date	01/09/2009	Expected End Date	31/07/2013

CAS Record Details	
Record Type:	Student
Academic Career:	UGRD Undergraduate
Student Career Nbr:	0
Application Number:	
Program Number:	0

[CAS Details](#)
[Maintain Applications](#)
[Student Program/Plan](#)

CAS Staging Data page

Use the search page to retrieve *Pending* or *Error* status records for review and update.

Use the Maintain Applications or Student Program/Plan links to search for and review existing application or student program records.

Use the CAS Details link to search for and review any existing CAS Details records.

For records with a status of Error, the existing CAS Details record should be corrected to allow the record to be re-processed when the process is next run (Use the CAS Details page to do this).

The system enables the CAS Details region if the import status is *Pending*. If you want to match the staging record with an existing application or student program record for re-processing:

1. Specify whether the new CAS Details record is for an applicant or student by selecting a value in the Record Type field.
2. Select the Academic Career for the applicant or student from the prompt.
3. Select the Student Career Number for the applicant from the prompt.
4. If the record type is applicant, select the Application Number from the prompt.
5. If the record type is applicant, select the Program Number from the prompt.
6. Save the record.

Generating PBI Communications

After the system assigns event IDs, use the following process to notify applicants or students about CAS Number or fee update details:

1. Use the 3C Engine Trigger Results page to view the result records that have been added (Campus Community, 3C Engine, 3C Engine Trigger Results).
2. Run the 3C Engine process for each event ID.
3. Use the Person Communication page to view the assigned communication.
4. Run the Communication Generation process to create the communication that you can send to applicants and students.

This section describes the steps to assign and generate communications for CAS Number and fee update notifications.

See Also

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, "Managing Communications"

PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, "Using the 3C Engine"

"Setting Up PBI Communications" section in this chapter

Reviewing 3C Engine Trigger Results

Access the 3C Engine Trigger Results page (Campus Community, 3C Engine, 3C Engine Trigger Results).

Use the 3C Engine Trigger Results page to review records that the Import CAS Details process or the Create Extract - update process creates.

Use the page to add any additional records required. Select Variable Data to add the required values for any additional records added.

This example shows the 3C Engine Trigger Results page for CAS Number notification:

3C Engine Trigger Results

Institution: PeopleSoft University

Event ID: CASA CAS Applicant

Customize | Find | View All |  

First  1-6 of 6  Last

Trigger Detail 1	Trigger Detail 2								
*ID Type	*ID	Name	*Trigger Status	Function		Variable Data	*Date Added		
1 Person 	SR13202 	Calhoun,David R	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
2 Person 	SR13203 	Chung,Tony	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
3 Person 	SR13204 	Daniel,Christine S	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
4 Person 	SR13205 	Delgado,Phillip R	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
5 Person 	SR13206 	Ferrum,Robin L	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
6 Person 	SR13207 	Foster,Cela	Processed 	CASN	CAS Notf	Variable Data	31/03/2010	 	
Add									

3C Engine Trigger Results page for CASA

Running the 3C Engine Process

Access the 3C Engine Parameters page (Campus Community, 3C Engine, Run 3C Engine).

3C Engine Parameters		Manage Duplicate Assignment	
Run Control ID: NG01		Report Manager Process Monitor Run	
Process 3Cs ☐ Population Selection ☒ Trigger Table ☐ Mass Change		Process Joint Records ☒ No ☐ Yes, all Joint IDs ☐ Yes, if match exists	
Event Selection			
Academic Institution: PSUNV PeopleSoft University			
Administrative Function: CASN CAS Notification			
Event ID: CASA CAS Applicant		Detail	
Communication Key			
CASA CAS Applicant			
Checklist Code			
Comment Category			

3C Engine Parameters page

Run the 3C Engine process for each of the Event IDs defined on the PBI Configuration page. The process assigns communications, comments and checklists associated with the Event ID to the ID of the applicant or student.

Assigned communications can be reviewed on the Person Communication page. To navigate to the Person Communication page, select Campus Community, Communications, Person Communications, Communication Management, Person Communication.

Running the Communication Generation Process

Access the Selection Parameters page (Campus Community, Communications, Communication Generation).

Run the Communication Generation process for each standard letter code to generate the communications for the assigned communications.

The following example shows that the Communication Method is set to *E-Mail*. Note that the ID Selection value should be set to *All Person IDs* rather than *All IDs* as shown on the example.

Selection Parameters | Process Parameters | Email Parameters | Checklist Parameters

Run Control ID: NG01 [Report Manager](#) [Process Monitor](#) [Run](#)

ID Selection

ID Selection: All IDs

Letter Code Selection

*Letter Code: CSA CAS Applicant Administrative Function: CASN CAS Notification

Template Selection

Report Name: CASA CAS Applicant [View Report Definition](#)

Data Source ID: CASA

Template ID	Description	Language	Method	Default Template
CASA_1		English	E-Mail	☒

Enclosures Assigned (Softcopy)

No Matching Template Found

☒ Use Default Template ☐ Do Not Produce Communication [Refresh Enclosure List](#)

Communication Language Usage

☒ Specified Language: English ☐ Preferred

Communication Method Usage

☒ Specified Method: E-Mail ☐ Preferred

Selection Parameters page

Define the Person Communication Usage values on the Process Parameters page.

Selection Parameters

Process Parameters

Email Parameters

Checklist Parameters

Run Control ID: NG01

[Report Manager](#) [Process Monitor](#)

Run

Usage Tables

Person Communication Usage

Address:

Land Address and Email Address

Address Name:

Primary Full

Salutation:

Primary Full

Extra Name:

Primary Full

Joint Salutation Usage

Joint Name:

Org Communication Usage

Org Recipient:

Primary Cntc, Pri Dpt, Pri Loc

Contact Name:

Primary Full

Communication Processing Dates

Communication Date Range Selection

*From Date:

20/03/2010

*To Date:

21/03/2010

Update Communication Generation Date With

☐ Communication Date

☒ System Date

☐ User Supplied Date

Update Communication Completed Date With

☐ Communication Date

☒ System Date

☐ User Supplied Date

Process Parameters page (1 of 2)

Output Settings

*Sort Option:

Country, Postal

☐ Online Preview

☐ Send to Printer

☐ Send to File

☐ Create Envelopes

☐ Create Labels

Missing Critical Data

☒ Produce Communication

☒ Complete Communication

Process Parameters page (2 of 2)

Define the From and Subject values on the Email Parameters page.

Selection Parameters

Process Parameters

Email Parameters

Checklist Parameters

Run Control ID: NG01

[Report Manager](#) [Process Monitor](#)

Run

Email Parameters

*From:john.smith@psunv.ac.uk

*Required if communication method usage is specific email or preferred.

*Subject:CAS Number Notification

*Required if communication method usage is specific email or preferred.

Reply to:

Sender:

Bounce to:

Importance

☐ low

☒ normal

☐ high

Sensitivity

☒ normal

☐ personal

☐ private

☐ company-confidential

Email Parameters page

Review the communications generated by the process on the Communications Management page (Campus Community, Communications, Person Communications, Communications Management).

Chapter 26

(NLD) Processing CBAP

This chapter provides an overview of CBAP (*Centraal Bureau Aanmelding en Plaatsing*) and discusses how to:

- Set up CBAP parameters.
- Maintain the CBAP suspension table.
- Load CBAP.
- Purge CBAP.
- Post CBAP.

Understanding CBAP

CBAP (*Centraal Bureau Aanmelding en Plaatsing*), the Dutch Central Bureau for Admissions and Registration, is part of IBG (*Informatie Beheer Groep*). CBAP registers admissions of all prospect first year students in Higher education or University. The CBAP utilizes the automated system RASP (Registration, Admissions, Selection and Placement) to facilitate registration. RASP registers the following information; Personal data of the prospect student, information about prior education and personal preference concerning the education institution and academic program to which he/she wants to apply.

The CBAP procedure for admissions is based on a mandatory statutory requirement registered in the Higher Education and WHW act, the act Admissions for Higher Education, the Act Registration Mandatory Course Catalog for Higher Education and the Act on Prior Education Requirements for Higher Education.

Dutch Funded Education Institutions offering a pre-bachelor phase, in Dutch known as *propedeuse*, are obliged to partake in Central Admissions Registration procedures. This means that if a student plans to register at the *propedeuse* year of an academic program offered by a before mentioned funded Institution, he or she should register via the IBG. The CBAP (on behalf of IBG) then follows mandatory procedures as registered in the WHW act (article 7.37) and ensures that Admissions data is supplied to the Institution in question.

Students that are exempt from first year *propedeuse* registration can register directly at the Education Institution. Students can register directly at Education Institutions, which are not bound by the WHW act.

CBAP Process Steps

The CBAP Process can be divided into four different steps:

1. Load CBAP flat file into suspense table.

2. Search/match equivalent suspense data in PeopleSoft and check and correct suspense data manually.
3. Process suspense data in PeopleSoft (Posting).
4. Purge the suspense table.

Before starting the CBAP Load process, the user should indicate these items in the setup table:

- CBAP will be used as a functionality.
- External Organization.
- Checklist Item codes.
- Academic career relevant for Higher Education.

External Organization is used as a default organization code. Students for whom prior education data should be entered via the core External Academic Data table should have a parent row present in Academic History. The External Organization should be entered if the core tables are to be updated. This field can be left empty. CBAP does not actually supply External Organization information, but Prior Education information only. Prior Education will be registered in Dutch prior Education tables by the posting process. In Dutch functionality registration of external organization for prior education is optional.

Loading CBAP Flat Files Into a Suspense Table

First, the user has to place the received CBAP flat file (ASCII) in a directory at the institution's system. This directory must be known before one can read the file in the suspense table. The CBAP file will contain Personal, pre- education and info about the education program the student wants to apply to. For this an application engine based process should be created.

Institution	The name of the institution should be provided.
BRINcode	This code will be used only for matching/processing/purge processes. The BRINcode is available on the CBAP Load run control page and in the security setup options. Including the BRINcode on the run control record enables prompting on a BRINcode security table.
Effective Date	This date is used for admissions date and withdrawal date of student applications.
Action Date	This date is used to track the date the application data was provided in the system. This date will update the corresponding field in the Admissions Application Maintenance pages.
Admit Term	The term in which you are matriculating the student into the academic program. The admit term usually defaults from the Recruiting and Admissions matriculation process. However, because you are performing the admissions action though a data load, you must select the admit term for the primary academic program that you have specified and it will be used as the default for those applicants that are part of the CBAP Load
Admit Type	Select the admit type that you want to default for those applicants that will be loaded through the CBAP Load Process.

Application Centre	Select the application center to be defaulted for each application. This information helps you track what office is handling specific applications. Define application centers on the Application Center Table page.
Academic Level	Select the academic level that you want to assign to the selected applicants that will be loaded from the CBAP Load.
Academic Plan	Select the academic plan that you want to assign to the selected applicants that will be loaded from the CBAP Load. Use this field when no standard plan has been defined.

After providing and then performing the checking of these parameters, the application process can be started and the data will be present in the suspense table. A status field will provide information to indicate whether the process ran successfully or not. This field will be present on a separate page in an online maintenance component for the suspense data.

This status field is called 'Edit' and contains the following values:

<i>Edit Value</i>	<i>Description</i>
Completed	Process was able to read the data and put it in the suspense table without any problems
Error	An error has occurred after reading or loading the record in the suspense table.
Perform/Post	This value is manually maintained and is for information purposes only. The value is used for informational purposes at schools. During the upload process the system will allocate one of two edit values, namely Completed or Error. The process does not use the Perform/Post field value.

The following errors might occur during the upload process and are displayed on the CBAP Processing Option panel:

- Error in Country.
- Error in Campus.
- Error in Academic Program.
- Error Prior Education.
- Error in Subject code.
- Error in Academic Plan.

These errors will occur during the loading process if values are present in the CBAP Load file that are not known in the PeopleSoft tables. The functional criteria for determining whether information supplied is correct or not is based on combinations of Academic program and Campus/BRINcode combinations. Functional and technical changes in registration of Campus, Home Campus and BRINcode should be taken into account.

Using the Posting Process to Perform Search/Match

For CBAP information to be present, the suspense table has to indicate whether information is to be added as new records (new student) in PeopleSoft core tables, or whether it has to be updated or ignored. To make this possible, search/match parameters must be provided. It should also indicate whether the search/match functionality setup used is actually the core search/match product provided by PeopleSoft. The posting process, which also performs search/match, uses this setup to perform search/match.

For new/existing students the following options apply for the suspense data:

- Add - add the suspense information to PeopleSoft.
- Suspend - nothing will be done with the suspense record.
- Ignore - the record will be removed eventually from the suspense table, no actions will be done for PeopleSoft.

A status field will provide information and indicate whether the process ran successfully. This field will be present on a separate page in an online maintenance component for the suspense data. This status field is called 'Search' will provide info if the process ran successfully.

Search Value	Description
Completed	The process has been run without any problems.
Error	An error has occurred in the search/match process of the record in the suspense table.
Perform/Post	Process has not been run yet for this record. This option is not evaluated the posting process and will not be used by it. The process uses the post field only when finished.

The process has to be based on application engine technology.

Processing Suspense Data

Before a suspense record can be processed, the read process and match process must have been run successfully for the student concerned. This will result in the edit and search fields both being set to complete. The process field will provide the status of the suspense record. The values described in the following table can be maintained manually in an online maintenance component, although some will be set automatically by the search/match process.

Value Process	Description	Set By
Error	An error has occurred during the process.	The system during the process

Value Process	Description	Set By
New ID Add	The system was not able to find a similar record/match in the PeopleSoft database and will add a new student ID when you run the search/match/post process When set manually, it means that the process identified a match and the user determined manually that no duplication exists. When the user runs the search/match/post process again, the process creates a new record and generates an ID, which it displays in the ID field on the Bio/Demo page.	The system during the search/match process, when no match was found in the PeopleSoft database. It can be set manually.
No Action	Manually entered. Search/match/post will ignore this option and the record will not be processed and purged from the suspense table.	Manual
Purge	This value means that the suspense record will be purged during the purge process (described in the purge section)	By the system when the search/match/post process if the record has been completed successfully
Update ID	The search/match/post process has found a matching ID in the PeopleSoft database. The process will update the matching records with the suspense record data When set manually, this indicates that the process identified a match and the user determined manually that duplication exists. The system makes available the ID field on the Bio/Demo page. Select the ID that you want the search/match/post process to update. You must save the page and run the search/match/post process to update the record.	By the system during the search/match process if a match was found in the PeopleSoft database and if your search parameters define that an update action should occur in this situation (only when you run search/match and post at different times). Set manually.
Wait Srch	This suspense record is waiting to be processed by the search/match/post process,	The system during the CBAP load process.

Setting Up CBAP Parameters

This section discusses how to set up CBAP parameters.

Page Used to Set Up CBAP Parameters

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CBAP Setup Parameters	SAD_CBSYST_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Setup Parameters	For CBAP there is only a setup for the institution and academic career. Security should prevent usage of CBAP as only key users will be able to use this functionality. After inserting a new setup record with the relevant institution and academic career, a few values have to be entered: Admin function is required for checklist determination in the CBAP process. Checklist code is required for the checklist which will be used for the CBAP process for the CBAP codes 0, 8, D and 9. The checklist items must be provided for usage within the CBAP process. This information is needed for determination in the CBAP process which item must be added to the earlier mentioned checklist for the relevant student if a code 8, 9 or D is used.

Setting Up CBAP Parameters

Access the CBAP Setup Parameters page (Student Admissions, Processing Admissions NLD, CBAP Setup Parameters).

CBAP Setup Parameters		
Academic Institution:	PSNLD	PeopleSoft University - NLD
Academic Career:	BAC	Bachelor (NLD)
CBAP Setup Parameters		
*Administrative Function:	ADMA 	Admissions Application
*Checklist Code:	ADMIS 	Netherlands Admissions
*Item Drawing Lot:	CHECK 	Check
*Item Decentralized Drawing:	APFEE 	Application Fee
Type of Name:	LEG 	Legal

CBAP Setup Parameters page

Administrative Function	The Administrative Function Table stores the codes for the core functional areas in Student Administration that process Communication, Checklists, and Comments. It also stores the key data that should be populated as variable data on the Communication, Checklist, and Comments records.
Checklist Code	Select the code that will create a checklist item once the Posting Process is executed.
Item Drawing Lot	This is a specific item for usage at CBAP codes 8 and 9. It will be added to the checklist in the posting process for the CBAP codes 8 and 9 as a drawing lot checklist item for the student.
Item Decentralized Drawing	A specific item for usage at CBAP code D. It will be added to the checklist in the posting process for the CBAP D code as a decentralized drawing checklist item for the student.
Type of Name	Indicate a usage of the student's name by entering a name type in the setup (usage of <i>LEG</i> is usually applied).

Maintaining the CBAP Suspension Table

This section discusses how to:

- Edit process options.
- Enter bio/demo data.
- Enter address information.

- Enter academic program data.
- Enter prior graduation information.
- Enter subject information.
- Enter messages.

Pages Used to Maintain the CBAP Suspension Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Processing	SAD_CBPROC_OPT_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Processing	Set and define processing options used in the CBAP Load process. The data contained in this component provides information, actions and status based on the CBAP Load process. This page also provides details regarding the search/match execution during the Post Process. You can determine if a record is waiting to be processed, a record created a new person to be added to the database, and any errors were encountered during the search/match or load process, etc.
Bio/Demo Data	SAD_CBBIO_DEMO_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Bio/Demo Data	Enter or select biographical and demographic information about the student.
Address Information	SAD_CBADDR_INF_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Address Information	Enter the student's address information.
Program Information 1	SAD_CBACD_INF1_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 1	The data on the Program Information 1 page is a result of both the load process, which is from the CBAP flat file, as well as data contained in the PeopleSoft Setup tables used to process the CBAP Load. Data can be added or changed which will be used in the CBAP Post Process.

Page Name	Definition Name	Navigation	Usage
Program Information 2	SAD_CBACD_INF2_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 2	The data on the Program Information 2 page is a result of both the data read from the CBAP flat file as well as data contained in the PeopleSoft Setup tables used to process the CBAP Load. Data can be added or changed which will be used in the CBAP Post Process.
Subject Information	SAD_CBACD_INF2_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Subject Information	The data on the Subject Information page is a result of the CBAP data load. Data can be added or changed which will be used in the CBAP Post Process.
Messages	SAD_CBMESGS_NLD	Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Messages	The data contained in the Messages page is a result of data that errors based on the load. The information contained provides specific reasons as to why certain data elements erred during the load process.

Editing Process Options

Access the Processing page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Processing).

Processing		Bio / Demo Data	Address Information	Program Information 1	
Test Type Record Nbr: 100157		Date Loaded: 09/28/2004			
Name Royal Prefix:		First Name: Richard			
Last Name: Bets		Middle Name: CD			
Edit Processing Option					
*Edit Processing Option		*Search/Match Processing Option		*Post Processing Option	
Error ▼		Perform ▼		Wait Srch ▼	
☐ Wrong Country for CBAP ☐ Error Prior Education ☒ Wrong CBAP Campus ☐ Error in Testcode Subject ☒ Program Error in CBAP ☒ Error in Plan					
Number of Search Matches					
Search Order Nbr: 0		Number of Search Matches: 0			

Processing page

This page indicates the status of a CBAP data record after the search/match process runs. You can determine if a data record is ready to be processed (posted). The page indicates whether a new person is added to the database. Errors are shown that occurred during search/match.

Test Type Record Nbr (test type record number) With each student in the flat file being loaded to the application, the number increases. The number is unique to each row in each CBAP file.

Date Loaded The date that the CBAP file was loaded to the application. It is the system date.

Name Royal Prefix The term used to designate the student's degree of sovereignty, nobility, or honor.

Edit Processing Option

If an error appears in any of the processing options fields, the Error Indicator group box displays the area in which an error occurred. You should correct the errors before you proceed. Once you make a change to any of the fields in this page, click the Save button at the bottom of the page

Edit Processing Option The field shows the status of this record as updated by the upload process:

Complete: The program was able to process this record without errors.

Error: An error has occurred processing of this record.

Perform: This value should be set manually only and serves informative purpose only.

Search/Match Processing Option

This field shows the status of the search/match process:

Complete: Search/match executed without errors.

Error: Error occurred during search/match.

Perform: Search/match has not yet been executed.

Post Processing Option

The post (verwerk) field shows the status of the record after posting has taken place. These values can be entered manually although some will be filled automatically after processes have run:

Error: An error has occurred during the posting process.

New ID Add: The system was not able to find an equivalent record in the database and will add a new student ID during posting.

No Action: This value was appointed manually and the posting process will ignore this record.

Purge: This value indicates that the record has been processed and should be purged from the suspense table.

Update ID: The system has found a matching ID in the database.

The existing ID should be updated with CBAP suspense file data during posting.

Wait Srch: This record is stored in the suspense table and waiting further processing by search/match.

Number of Search Matches

Search Order Nbr (search order number)

The search number of the search level used to find a match for the person shown.

Number of Search Matches

The number of "hits" for this particular person.

Entering Bio/Demo Data

Access the Bio/Demo Data page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Bio/Demo Data).

Processing	Bio / Demo Data	Address Information	Program Information 1
Test Type Record Nbr: 100157		Date Loaded: 09/28/2004	
Name Royal Prefix:		First Name: Richard	
Last Name: Bets		Middle Name: CD	
ID:		CBAP Action Code: 3	
Last Name: Bets		First Name: Richard	
Middle Name: CD		Name Royal Prefix: 	
*Gender: Male 		*GBA Status: Rel Ver. 	
Date of Birth: 06/02/1985 		Birth Location: Kampen	
Date of Death: 			
Telephone: 033 2463637			
Correspond Nbr: 039981321003		Legal Names 1: Richard Carsten Dominic	
Hist. Corr. Nbr: 000000000000		Legal Names 2:	

Bio/Demo Data page

This page contains all biographical and demographic data loaded into the suspense table when a new record is posted. If a matching data record is found in the database, and the option is chosen to update database data with CBAP suspense data, these personal data elements will not overwrite the existing personal data elements.

ID

After running the upload process the ID field is set to display only and is empty. After the search/match process has run, this field will be open for editing and should contain the ID of the student found in the database if an equivalent is found based on the search/match criteria. The field will contain the value NEW for all new admissions students unknown to the system.

GBA Status (Gemeentelijke Basis Administratie status)

The student's *Gemeentelijke Basis Administratie* (GBA) status as assigned by the GBA to the person. The data is loaded from the CBAP file into the system.

Correspond Nbr (corresponding number)

The student's Gemeentelijke Basis Administratie (GBA) status as assigned by the GBA to the person. The data is loaded from the CBAP file into the system.

Hist. Corr. Nbr (historical correspondence number)

The person's historical correspondence number. This value is loaded from the CBAP file.

Legal Names 1 and Legal Names 2

These fields will be populated with the full name of the student, received from the CBAP suspense file. First, the Legal Names 1 field is populated, and, if needed, then the Legal Names 2. When the name type is filled at the CBAP setup parameter, these names will be eventually entered in the system at the name type provided in the parameter setup.

Entering Address Information

Access the Address Information page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Address Information).

<u>Processing</u>		<u>Bio / Demo Data</u>		Address Information		<u>Program Information 1</u>					
Test Type Record Nbr: 100157				Date Loaded: 09/28/2004							
Name Royal Prefix:				First Name: Richard							
Last Name: Bets				Middle Name: CD							
Address Line 1:		Frans Kragtstraat									
CBAP House Number:		2		CBAP B App nbr:				CBAP E App Nbr:			
Address Line 2:											
City:		Nijkerk Gld				Postal Code:		3861 DJ			
2-Char Country Code:		NL		CBAP Country Code:		6030		*Country:		NLD	
☐ Foreign Address Ind											

Address Information page

This page contains demographic information from the CBAP Load file. This page should be used to view and or alter address data before posting.

CBAP House Number	The house number that CBAP has on file for this student.
CBAP B App Nbr	The student's beginning apartment number.
CBAP E App Nbr	The student's ending apartment number.
Foreign Address Ind	The foreign address indicator is used when the country is not equal to NLD (Netherlands). The address row displays and must be entered accordingly.

Entering Academic Program Data

Access the Program Information 1 page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 1).

Processing	Bio / Demo Data	Address Information	Program Information 1																																																												
Test Type Record Nbr: 100038		Date Loaded: 10/05/2004																																																													
Name Royal Prefix:		First Name: Richard																																																													
Last Name: Bets		Middle Name: CD																																																													
<table border="1"> <tbody> <tr> <td>*Effective Date:</td> <td>01/09/2004</td> <td>*Action Date:</td> <td>10/05/2004</td> </tr> <tr> <td>*Academic Institution:</td> <td>PSNLD</td> <td colspan="2">PeopleSoft University - NLD</td> </tr> <tr> <td>*BRINcode:</td> <td>NL01</td> <td colspan="2">NLD Brincode 01</td> </tr> <tr> <td>*Campus:</td> <td>MAIN</td> <td colspan="2">Main Campus</td> </tr> <tr> <td>CIP Code:</td> <td>34402</td> <td colspan="2">BusinessEconomics</td> </tr> <tr> <td>*Academic Career:</td> <td colspan="3">Bachelor (NLD)</td> </tr> <tr> <td>*Academic Program</td> <td>H001</td> <td colspan="2">Business Economics</td> </tr> <tr> <td>*Academic Plan:</td> <td>H00001</td> <td colspan="2">Business Economics</td> </tr> <tr> <td>Academic Level:</td> <td colspan="3">First Year</td> </tr> <tr> <td>Acad Load:</td> <td colspan="3">Full-Time</td> </tr> <tr> <td>*Admit Term:</td> <td>2040</td> <td colspan="2">Acad year 2004-2005</td> </tr> <tr> <td>*Admit Type:</td> <td>REG</td> <td colspan="2"></td> </tr> <tr> <td>*Application Center:</td> <td>STD</td> <td colspan="2">Standard</td> </tr> <tr> <td>CBAP Year of Study:</td> <td>2004</td> <td colspan="2"></td> </tr> <tr> <td>Study Location:</td> <td colspan="3"></td> </tr> </tbody> </table>				*Effective Date:	01/09/2004	*Action Date:	10/05/2004	*Academic Institution:	PSNLD	PeopleSoft University - NLD		*BRINcode:	NL01	NLD Brincode 01		*Campus:	MAIN	Main Campus		CIP Code:	34402	BusinessEconomics		*Academic Career:	Bachelor (NLD)			*Academic Program	H001	Business Economics		*Academic Plan:	H00001	Business Economics		Academic Level:	First Year			Acad Load:	Full-Time			*Admit Term:	2040	Acad year 2004-2005		*Admit Type:	REG			*Application Center:	STD	Standard		CBAP Year of Study:	2004			Study Location:			
*Effective Date:	01/09/2004	*Action Date:	10/05/2004																																																												
*Academic Institution:	PSNLD	PeopleSoft University - NLD																																																													
*BRINcode:	NL01	NLD Brincode 01																																																													
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*Academic Program	H001	Business Economics																																																													
*Academic Plan:	H00001	Business Economics																																																													
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*Admit Type:	REG																																																														
*Application Center:	STD	Standard																																																													
CBAP Year of Study:	2004																																																														
Study Location:																																																															

Program Information 1 page

Effective Date

The system displays the effective date for the status of the applicant. This value defaults from the corresponding field on the CBAP Load Parameters page. The CBAP Load process uses the effective date field for Admissions and Student Records adds and withdrawals. The process writes to the application program data record. For personal data changes, the CBAP load process uses the current system date to update the relevant record.

Action Date

The system displays the action date for the status of the applicant. This value defaults from the corresponding field on the CBAP Load Parameters page. The system records and displays the action date to track the date the information was actually updated. The CBAP Load process will write this value to all records containing the Action Date field for this applicant.

Academic Institution	This field displays the academic institution for which you want to load data from the CBAP file into the suspense file. The CBAP process places the institution value you select into different records as defined by the process itself. This value defaults from the corresponding field on the CBAP Load Parameters page.
BRINcode	This is a code that is assigned to all Dutch Institutions by the Dutch Ministry of Education and is mandatory that this code be used in all official communications with the Ministry.
Campus	The Campus that is requested in this application. Campus values are defined on the Campus Table page.
CIP Code	The appropriate VREBO Code for the academic plan as found on the CBAP file. CREBO Codes are defined on the Crebo Codes in the Netherlands Academic Structure Setup component.
Academic Career	The academic career that is requested in this application. Academic career values are defined on the Academic Career Table.
Academic Program	The academic program that is requested in this application. Academic program values are defined on the Academic Program Table.
Academic Plan	The academic plan within the academic program that is requested in this application. This value defaults from the corresponding field on the CBAP Load Parameters. Academic plan values are defined on the Academic Plan table.
Academic Level	The CBAP Load process maps the academic level to the academic level field in CRI-HO. This level will be used later in the process of sending information to the Central Register of Higher Education in the Netherlands. When the system is checking to see if an applicant is allowed to be withdrawn, it will not allow the withdrawal if the applicant's academic level is different then the one entered on this page. This value defaults to the CBAP Suspense file and can be changed once in the CBAP Suspense pages. The values for the academic level fields are delivered with the system as translate values.
Acad Load (academic load)	This field displays the applicant's selected academic load for the program to which she or he is applying as found on the CBAP file.
Admit Term	The admit term will be displayed for the term to which the applicant applies. The CBAP Load process will write this admit term value in every record with the Admit Term field in it. This value defaults to the CBAP Suspense file, where it can be later changed in the CBAP Suspense page.
Admit Type	Admit type for this applicant regarding this application. For example, you may have a value such as "First-Year and Transfer". The CBAP Load process writes the admit type to every application record found in the CBAP file. Values for this field are defined on the Admit Type table. This is an user default field. This value defaults to the CBAP Suspense file, where it can later be changed in the CBAP Suspense pages.

Application Center	Enter the application center where this application will be processed. This information helps you track what office is handling specific applications. Values for this field are defined on the Application Center table. This is an user default field. The value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense component.
CBAP Year of Study	The CBAP Load process displays the academic year for which the applicant wants to commence study.
Study Location	The CBAP Load process displays the location of the applicant's prior education. This value defaults from the corresponding External Organization field on the CBAP Load Edit Parameters page.

BRINcode

BRIN is short for Basic Registration for Institutions (*Basisregistratie instellingen*). The Dutch Ministry of Education only is authorized to appoint BRINcodes to all institutions. It is mandatory that this code be used in all official communications with the Ministry. This is why the BRINcode is relevant for communications concerning Admissions and Registrations. Therefore, the functionality that should be built for CBAP, is affected by this Ministerial requisite. The BRINcode is a four-digit number, supplemented with a two-digit location code, which distinguishes one institution from another. This connection with locations in addition to Institutions implies that the BRINcode does not have a one on one relationship with the institution. Multiple BRINcodes may exist within one Institution. As the Dutch Ministry of Education appoints BRINcodes, they should be considered semi-dynamic. BRINcodes will only change if the organizational structure of an Institution changes in a way that has impact on legal company structures or responsibility structures concerning requirements as set by the Ministry of Education or if the Ministry decides that new BRINcodes should be issued. BRINcodes are usually only issued for new institutions. It follows that registration of BRINcode should be effective-dated. Registration of BRINcode should be possible in combination with Academic Programs, Campus and Academic Organization. Multiple Academic Programs and Campus combinations may be in operation within one specific BRINcode.

CIP Code and HEGIS Code

For Academic Programs all qualifications on MBO level (*Middelbaar Beroepsonderwijs*), which offer Adult Education and Professional Education, are registered as CREBO codes (*Centraal Register BeroepsOnderwijs*). CREBO roughly translates as Central Registry for Professional Education. The Academic Programs are actually derivatives of the CREBO codes. The Dutch Ministry of Education, via the IBG, appoints CREBO codes. The CREBO code is registered in the HEGIS Code Table. The CIP code (ISAT code) is a means to register qualifications and Academic Programs for Higher Education. The ISAT code is also appointed by the IBG. As the CIP code and the HEGIS code are not mutually exclusive, two separate tables are necessary to register these codes. The CIP code is registered in the CIP Code Table. Both codes are considered dynamic and therefore should be registered in effective-dated tables. A clear and apparent connection should exist between the CIP codes and Academic Programs and Plans. The same relationship applies for HEGIS Codes and Academic Programs and Plans.

Entering Prior Graduation Information

Access the Program Information 2 page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Program Information 2).

Program Information 1		Program Information 2		Subject Information		Messages	
Test Type Record Nbr:		100157		Date Loaded:		09/28/2004	
Name Royal Prefix:				First Name:		Richard	
Last Name:		Bets		Middle Name:		CD	
Graduation Year:		2004		☐ Diploma Received			
Descr rec. dipl:		MIDDENKADEROPLEIDING BOUWKUNDE					
Prior Education:		10130		Computer science			
Exceptions report		1					

Program Information 2 page

Graduation Year	The year the applicant graduated or will graduate from the prior education.
Diploma Received	This field displays whether the applicant already received a diploma from the prior education.
Descr rec. dipl (description recent diploma)	The Institution at which the prior diploma was awarded.
Prior Education	The applicant's prior education before applying to your institution.
Exceptions report	Indicates when an institution can expect information from CBAP about the applicant's <i>bewijs van toelating</i> . This is a letter of acceptance from the IBG.

Entering Subject Information

Access the Subject Information page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Subject Information).

Program Information 1

Program Information 2

Subject Information

Messages

Test Type Record Nbr:100157

Date Loaded:09/28/2004

Name Royal Prefix:

First Name:Richard

Last Name:Bets

Middle Name:CD

CBAP Subject 1:BIOLBiology

CBAP Subject 2:LABSLab Sci

CBAP Subject 3:CHEMChemistry

CBAP Subject 4:

CBAP Subject 5:

CBAP Subject 6:

CBAP Subject 7:

CBAP Subject 8:

CBAP Subject 9:

CBAP Subject 10:

Subject Information page

CBAP Subject (1 - 10)

Subject data comes from the CBAP Load process and is loaded in the students external subjects.

Entering Messages

Access the Messages page (Student Admissions, Processing Admissions NLD, CBAP Suspension Table, Messages).

Program Information 1		Program Information 2		Subject Information		Messages	
Test Type Record Nbr: 100157		Date Loaded: 09/28/2004		Name Royal Prefix:		First Name: Richard	
Last Name: Bets		Middle Name: CD					
Find View All First 1 of 1 Last							
*Process Instance: 307		Date Loaded: 09/28/2004					
*Message Set Number: 14906							
*Message Number: 43							
*Message Severity: Error							
Comments:		The brin code does not match a campus					

Messages page

Process Instance	The field displays the process number of the last process run for this record. This number is generated by the Process Scheduler.
Date Loaded	The date the CBAP file was loaded into the suspense file.
Message Set Number	The message set number is copied from the message catalog that has been defined in the system data definitions database.
Message Number	The message number is a subset from the Message Set Number and has been defined in the system data definitions.
Message Severity	This field displays the severity of the message, such as <i>Message</i> or <i>Error</i> .
Comments	The results or other additional information about the message.

Loading CBAP

This section discusses how to load CBAP.

Page Used to Load CBAP

Page Name	Definition Name	Navigation	Usage
CBAP Load	SAD_CBLOAD_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Load	Use the CBAP Load/Edit parameters to define parameters required for loading data from a CBAP data load, as well as to designate the location of the CBAP file you will be loading. You should complete the full loading, search/match and posting before loading a new set of CBAP data.

Loading CBAP

Access the CBAP Load page (Student Admissions, Processing Admissions NLD, CBAP Load).

CBAP Load

Run Control ID: CBAP_POST
[Report Manager](#)
[Process Monitor](#)

CBAP Load File Parameters

Input File: \enc-bstcyr\temp\cbap\cbapup.txt

Output File Path: \enc-bstcyr\temp\

Institution: PSNLD PeopleSoft University - NLD

*BRINcode: NL01 NLD Brincode 01

Effective Date: 10/15/2004
Action Date: 10/05/2004

Admit Term: 2040 Acad year 2004-2005

Application Center: STD Standard

Admit Type: REG Regular

Academic Plan: H00001 Business Economics

Academic Level: First Year

CBAP Load page

Store the CBAP suspense file in an accessible network or local directory. The CBSP file contains personal data; data about prior education, information about the school; academic program and location to which the student wants to apply for admission.

Warning! The loading, search/match and posting cycle needs to be completed for one file before loading the next file.

Input File	Indicate the location (directory path) and file name where the CBAP file resides. After the location has been entered the file can be loaded using the Load Process.
Output File Path	Indicate the location (directory path) where any output that may be generated will be logged.
Institution	Enter the academic institution for which you want to load data from the CBAP file into the suspense tables. The CBAP Load process places the institution value you select into a different records as defined by the process itself. This value defaults to the CBAP Suspense tables, where you can then edit it in the CBAP Suspense page. Institution values are defined on the Academic Institution Component. The institution should match the institution for the BRINcode in the upload file delivered.
BRINcode	The posting process will use this code only. The CBAP Load will match the external subject defined, with the Campus/BRINcode setup which has been tied to the Academic Institution. BRINcodes are set up in the Netherlands Academic Structure component group.
Effective Date	The effective date or date from will be used as the effective date for applications and withdrawals in admissions and enrollment records. For the update of personal data, names and addresses the process will use the system date as the effective date. If the process tries to enter a withdrawal and finds an effective date, which is a date after the effective date used on this page, the interface will use the date found in the system and not the date entered here.
Action Date	The system records and displays the action date to track the date the information was actually updated. The CBAP Load process will write this value to all records containing the Action Date field for this applicant. This value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense page.
Admit Term	The admit term will be displayed for the term for which the applicant applies. The CBAP Load process will write this admit term value in every record with the Admit Term field in it. This value defaults to the CBAP Suspense file, where it can be later changed in the CBAP Suspense page.
Application Center	Enter the application center where this application will be processed. This information helps you track which office is handling specific applications. Values for this field are defined on the Application Center Table. This is an user default field. The value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense pages.

Admit Type

Enter the admit type for this applicant regarding this application. For example, you may have values such as "First-Year and Transfer". The CBAP Load process will write the admit type to every application record found in the CBAP file. Values for this field are defined on the Admit Type Table. This is an user default field. This value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense pages.

Academic Plan

The academic plan will be entered in the plan data for this student if no standard plan is used or defined by the system. An academic plan can be any area of study, such as English, Math, Physics, or Undeclared. Values for this field are defined on the Academic Plan Table. This is an user default field. This value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense pages.

Academic Level

The CBAP Load process maps the academic level to the academic level field in CRI-HO. This level will be used later in the process of sending information to the Central Register of Higher Education in the Netherlands. When the system checks whether an applicant is allowed to be withdrawn, it will not allow the withdrawal if the applicant's academic level is different to the one entered on this page. This value defaults to the CBAP Suspense file, where you can edit it in the CBAP Suspense pages. The values for the academic level fields are delivered with the system as translate values.

Purging CBAP

This section discusses how to purge CBAP.

Page Used to Purge CBAP

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CBAP Purge	SAD_CBPURG_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Purge	Use the CBAP Purge process to purge CBAP Suspense file records and their associated processing messages from your database based on the processing parameters you define on this page.

Purging CBAP

Access the Purge CBAP page (Student Admissions, Processing Admissions NLD, CBAP Purge).

CBAP Purge

Run Control ID: CBAP_PURGE [Report Manager](#) [Process Monitor](#) **Run**

Purge Option

☒ All Suspense Rows
☐ Marked Suspense Rows

Purge Messages

☐ Retain Associated Messages
☒ Remove Associated Messages

BRINcode

*BRINcode: NL01 NLD Brincode 01

CBAP Purge page

Purge Option**All Suspense Rows**

Select this option to purge all data in the suspense file. Use this criteria if you do not plan to go through your CBAP Suspense records. You can purge these records whether or not you have errors and regardless of the value selected for the Post field on the Processing Options page.

Marked Suspense Rows

Select this option when all records marked "clean/purge" should be purged from the suspense table.

Purge Messages**Retain Associated Messages**

Select this option if the error messages should be saved. The messages are related to the CBAP suspense rows you have selected to purge.

Remove Associated Messages

Select this option to purge the CBAP error message files.

BRINcode

A code that is assigned to all Dutch Institutions by the Dutch Ministry of Education, and it is mandatory that this code be used in all official communications with the Ministry.

Posting CBAP

This section discusses how to:

- Establish CBAP post parameters.
- Establish CBAP search parameters.

Pages Used to Post CBAP

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
CBAP Post Parameters	SAD_CBPOST_PAR_NLD	Student Admissions, Processing Admissions NLD, CBAP Post, CBAP Post Parameters	Use the CBAP Post parameters to post CBAP external data. You need to set up the search/match/post parameters in order for the CBAP Post process to function.
CBAP Search Parameters	SEARCH_PARMS	Student Admissions, Processing Admissions NLD, CBAP Post, CBAP Search Parameters	For this page, the search match criteria must be set up for CBAP. The standard search match method, which contains a set of search match rules, is selected by the user. The settings can then be selected in order to indicate which action will be taken in the instance of one or more student actions for the found rule. Note. The standard search/match rules are used as are provided in standard PeopleSoft HR (SOA). This means that next to the provided set of search match rules, new ones can be created in standard PeopleSoft for usage at CBAP as well.

Establishing CBAP Post Parameters

Access the CBAP Post Parameters page (Student Admissions, Processing Admissions NLD, CBAP Post, CBAP Post Parameters).

CBAP Post Parameters page

Search/Match/Post Process Optn

Search, Match and Post Select this option to upload the suspense table and post the suspense table content.

Post Only Select this option to directly post only.

Search and Match Only Select this option to only execute search/match using the suspense table. These actions will not process/post the suspense data.

Academic Institution Use the CBAP Post parameters to post CBAP external data. You need to set up the search/match/post parameters in order for the CBAP Post process to function.

Action Reason Select the action reason that should be used to add an admissions row to the database.

Withdrawal action reason Select the withdrawal action reason that should be used to add a withdrawal row to the database.

BRINcode

Select the BRINcode, indicate for which BRINcode the suspense data should be processed. This is a code that is assigned to all Dutch Institutions by the Dutch Ministry of Education and is mandatory that this code be used in all official communications with the Ministry.

Establishing CBAP Search Parameters

Access the CBAP Search Parameters page (Student Admissions, Processing Admissions NLD, CBAP Post, CBAP Search Parameters).

CBAP Post Parameters

CBAP Search Parameters

Run Control ID: PS

[Report Manager](#) [Process Monitor](#)

Run

*Search Parameter:

No Match Found

	Add	Update	Suspend	Ignore
New:	☒	☐	☐	☐

Match(es) Found

Find | View All

1 of 1

Order Nbr:

*****Parameters Refreshed*****

One Match:

☐

☒

☐

☐

Multiple Matches:

☐

☒

CBAP Search Parameters page

Search Parameter

Select the search parameter code that includes the search fields you need to use to perform the search. The search parameter prompt only allows you to select the search parameters you have been giving access to.

Search/Match Functionality

When CBAP data has been loaded into the suspense table, the user must enter the right search/match criteria in the CBAP search/match criteria panel. These settings will indicate when a new record should be added or if data in the suspense table should be used to update existing data. The settings also determine which data should be ignored for processing. After the search/match settings have been chosen, the same parameters can be used to post the CBAP data. Both processes can be run simultaneously (search/match and immediate posting). The user can also chose to first run a search/match and then run the posting process afterwards.

The search/match process will first process all CBAP suspense data with action code zero. All other action codes (such as withdrawal, change, cancel) update current applicants by adding new effective-dated rows to their existing records. Action codes are found on the CBAP file itself and loaded into the suspense file through the CBAP Load process. The search/match process should not fail if no effective-dated row is found for an action code other than zero. It should always find someone with the same information in the CBAP file. The process will affect an order by on the correspondence number. It will do so in order to determine which students are present in the suspense table with multiple action codes. That is, if the same correspondence number appears more than once in the CBAP file, it means that there is more than one row for this applicant, therefore more than one action for this applicant. If the search/match process finds an action of 0 plus an additional action, it will perform both actions.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Searching for Records and Using Search/Match," Understanding the Difference Between Search Box Search and Search/Match.

No Match Found

Search/Match Parameters	Add	Update	Suspend	Ignore
<i>When the data is posted and the search/match process does not find an equivalent record, please select one of the options under heading new.</i>	Add the record to the database, including personal data.		Add the data to the suspense table only.	Ignore the CBAP data completely and delete this record. Do not add to suspense table or core tables.
<i>In the component with uploaded data, select each sequence number (one record in suspense table) for which an equivalent data element can be found in the core tables, and indicate which action should be taken. The following action can be chosen.</i>	Add a new record to the core tables using the CBAP suspense record	Update the existing record in the core tables using the CBAP suspense record.	Postpone the equivalent CBAP suspense record; it will only be added to the suspense table.	Ignore the CBAP suspense record, it will be removed and not processed to the suspense table or the core tables.
<i>Select the sequence number for which the system has found more potential matches in the core tables. The following action can be chosen.</i>	Add a new data record to the core tables using the CBAP suspense record.		Postpone the equivalent CBAP suspense record; it will only be added to the suspense table.	Ignore the CBAP suspense record, it will be removed and not processed to the suspense table or the core tables.

Match(es) Found

When a match is found, the suspense record is processed for all CBAP codes, if the found search match rule is set to action update (search match parameters). All relevant data related to the provided CBAP action code will be updated. If it was manually set to add, or if the search match rule has been set to add, a new record will be created only for CBAP action codes 0, 8, or D. Otherwise the suspense record will not be processed, but will be suspended for manual correction.

Chapter 27

(NLD) Managing Studielink

This chapter provides an overview of Studielink functionality for the Netherlands and discusses how to:

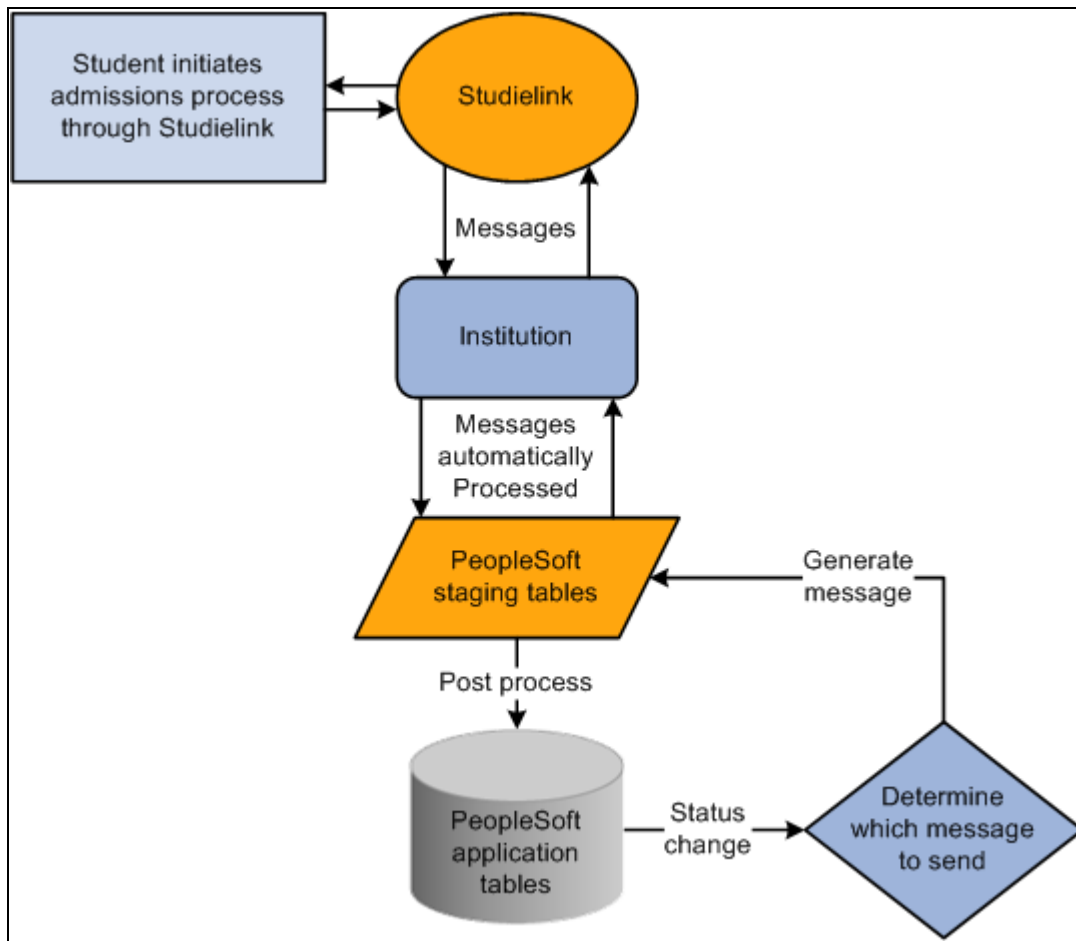
- Set up Studielink.
- Receive messages from Studielink.
- Post Studielink messages to application tables.
- Review and update Studielink information.
- Manage outbound messages.
- Change student status using Studielink.

Understanding Studielink

From 2006, participating higher education institutions in the Netherlands must enable their student information system (SIS) to communicate with Studielink, the new centralized admissions and enrollment system. For participating institutions, Studielink replaces the CBAP (Centraal Bureau Aanmelding en Plaatsing) admissions process.

Studielink requires constant communication between the institution and the Studielink system. This communication extends beyond the admissions application process to the student's annual re-enrollment while matriculating at their institution. Electronic messages are defined for all interactions between the institution and Studielink. As the status of the student's application and matriculation changes, the institution must immediately update the Studielink system; as the student reports status changes directly to Studielink, the Studielink system must send messages to update the institution. There are approximately 30 distinct electronic messages that can be shared between Studielink and the institution.

This diagram provides an overview of the process:



Studielink information process flow

Communication between Studielink and the institution is in the form of individual XML messages. Specifications for each message type are available from the Studielink website.

The following is a high level overview of how Campus Solutions processes the Studielink messages:

1. Studielink sends messages to the Campus Solutions system. The message data may include admission applications.
2. The Campus Solutions system automatically loads the inbound messages into the staging tables.
3. Run the Post Studielink Messages process to post the messages into the application tables. The posting process creates Campus Solutions personal and application records for the new applications. The posting process uses the search/match parameters to determine whether the applicant already exists in the PeopleSoft database or is a new applicant. For existing applicants or students, the posting process may update Studielink specific Campus Solutions status fields, add or remove prior education schools and courses, add or change fees payment data, and process withdrawal, cancellation or re-enrollment requests.
4. You might have to use a Campus Solutions page or an equation to determine if a message should be sent to Studielink. In some cases, the system can automatically determine if the messages should be sent. For example, the system automatically determines when the Receipt of Application (31A) message should be generated. On the other hand, to indicate that the Student's prior education is deficient or sufficient (31K) message should be sent, you can select the 31K check box on the Application Regional page or the Academic Prog Higher Education page, or use an equation.

5. Run the Generate Studielink Message process to generate messages that you want to send to Studielink. This process fills data into the outbound staging tables, checks data content, and generates XML messages.

See <http://www.surffoundation.nl/smartsite.dws?ch=STL> for XML message specifications.

Oracle's PeopleSoft Integration Broker is the technology used to facilitate the transmission of messages between Studielink and the institution. Integration Broker is installed as part of the PeopleTools installation process. You must upgrade to 8.48.17 or a higher version of PeopleTools to connect to Studielink.

Setting Up Studielink

This section discusses how to:

- Activate Studielink functionality.
- Set up online Studielink behavior.
- Set up prior education information.
- Set up BRINcodes.
- Set up sub BRINcodes for BRINcode locations.
- Set up academic programs for Studielink.
- Set up academic plans for Studielink.
- Set up BRINcode and institution cross-references.
- Set up civil and marital status cross-references.
- Set up Search/Match data.
- Set up Studielink address usage.
- Set up Studielink phone usage.
- Set up Studielink message processing parameters.
- Set up Studielink Search/Match parameters.
- Set up Studielink send parameters.
- Set up Studielink financial parameters.
- Set up Admissions online status handling.
- Set up Student Records online handling.
- Set up withdrawal action reasons.
- Set up correction of cancellation/end of enrollment action reasons.
- Set up Studielink Start Occasion and Start Year.

- Set up program action reason codes.
- Map language codes to language preferred codes.
- Set up foreign addresses.
- Set up visa/permit values.
- Map visa/permit codes.
- Set up Integration Broker to communicate with Studielink.
- Set up Studielink message equations.

Note. Institutions are expected to complete the necessary Academic Structure setup to support the NLD Higher Education functionality within the Campus Solutions system. Your institution should register with Studielink to access the Studielink application.

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," (NLD) Defining Dutch Academic Structure

Pages Used to Set Up Studielink

Page Name	Definition Name	Navigation	Usage
SA Features	SCC_INSTALL_SA2	Set Up SACR, Install, Student Admin Installation, SA Features	Activate Studielink and other NLD specific fields and pages in the system. Allow BRINcode to be linked to an internal organization.
Academic Institution 6	INSTITUTION_TABLE	Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6	Set up Studielink-specific online page behavior.
Prior Education Table	SSR_PRE_EDU_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, Prior Education Table NLD, Prior Education Table	Define prior education programs which may be delivered by Studielink messages.
BRINcode Table	SCC_BRINCODE_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD, BRINcode Table	Set up BRINcodes of type <i>Internal</i> which represent the legislative assigned BRIN for your institution or create BRINcodes of type <i>External</i> to map to External Organizations schools.

Page Name	Definition Name	Navigation	Usage
Sub-BRINcode Table	SCC_SUBBRIN_NLD	Set Up SACR, Foundation Tables, Academic Structure NLD, SubBrincode Table NLD, Sub-BRINcode Table	Define location specific SubBRINcode for internal or external BRINcodes.
Home Campus NLD	SSR_PROG_OWN_NLD	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Home Campus NLD	Set up home campus information for Dutch students.
Academic Plan Table	ACADEMIC_PLAN_TBL	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table	Set up academic plan information.
BRINcode/Institution Cross-reference	SAD_SL_BRN_INST	Student Admissions, Processing Studielink NLD, Setup Studielink, BRINcode/Institution Xref	Define the valid BRINcodes for each institution.
Civil Status/Marital Status Cross-reference	SAD_SL_MAR_STAT	Student Admissions, Processing Studielink NLD, Setup Studielink, Civil Status/Mar Status Xref	Set up civil and marital status cross-references.
Search/Match Rule	HCR_SM_RULE	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules	Define sets of fields to search for and identify how to search for them.
Search Parameters	HCR_SM_PARM	Set Up SACR, System Administration, Utilities, Search/Match Parameters, Search Parameters	Combine and order search rules. Users select the combination (called the search parameter), prior to performing a search, to determine the fields on which they are permitted to search.
Search Permissions	HCR_SM_PERM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Studielink Inbound Address Usage	SAD_SL_ADDR_USAGE	Student Admissions, Processing Studielink NLD, Setup Studielink, SL Inbound Address Usage, Studielink Inbound Address Usage	Set up how inbound addresses are processed.

Page Name	Definition Name	Navigation	Usage
Studielink Outbound Address Usage	SAD_SL_OUT_ADDR_US	Student Admissions, Processing Studielink NLD, Setup Studielink, SL Outbound Address Usage, Studielink Outbound Address Usage	Set up how outbound addresses are processed.
Studielink Inbound Phone usage	SAD_SL_PHONE_IN	Student Admissions, Processing Studielink NLD, Setup Studielink, SL Inbound Phone Usage, Studielink Inbound Phone usage	Set up inbound phone usage.
Studielink Outbound Phone usage	SAD_SL_PHONE_OUT	Student Admissions, Processing Studielink NLD, Setup Studielink, SL Outbound Phone Usage, Studielink Outbound Phone usage	Set up outbound phone usage.
Studielink Load Parameters	SAD_SL_LOAD_PARM	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Load Parameters	Set up which version of Studielink is processed and which inbound messages are to be processed. Set up application defaults as well as checklist or events processing per institution and career.
Studielink SearchMatch Parameters	SAD_SL_SRCHMCH	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Search/Match Parameters	Set up the search/match criteria for processing Studielink Message 03.
Studielink Send Parameters	SAD_SL_SEND_PARM	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Send Parameters	Control if and how outbound messages are to be processed by adding Studielink specific field values that control online triggering and/or data selection of Studielink messages.
Studielink Financial Parameters	SAD_SL_SEND1_PARM	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Financial Parameters	Control which inbound and outbound Studielink financial messages are processed and control how data for financial messages is selected.

Page Name	Definition Name	Navigation	Usage
Admissions Online Status Handling	SAD_SL_ADM_STAT	Student Admissions, Processing Studielink NLD, Setup Studielink, Admission Online Status Values, Admissions Online Status Handling	Map an Admissions program action to a Studielink status.
Student Records Online Status Handling	SAD_SL_SR_STAT	Student Admissions, Processing Studielink NLD, Setup Studielink, Records Online Status Values, Student Records Online Status Handling	Map a Student Records higher education program action to a Studielink status.
Admissions Program Action & Studielink Status Mapping	SAD_SL_ADM_RSN	Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Admissions Setup	Map Campus Solutions program action (and action reason) values to the Studielink end reason and Studielink status values. The system uses this mapping for applicants when it receives message 35 and when it generates message 31G for applicants.
Student Records Program Action & Studielink Status Mapping	SAD_SL_PRG_RSN	Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Student Records Setup	Map Campus Solutions program action (and action reason) values to the Studielink end reason, Studielink status and Prog Action HE values. The system uses this mapping for students when it receives message 35 and when it generates message 31E for students.
Msg 48 Admission Correction	SAD_SL_CRADM_RSN	Click the Studielink Correction Status link on the Studielink Send Parameters page.	Map a Campus Solutions Admissions program action reason value to a Studielink correction status.
Msg 48 Student Records Correction	SAD_SL_CORRPRG_RSN	Click the Studielink Correction Status link on the Studielink Send Parameters page.	Map a Prog Action HE action value to a Studielink status. Any field changes for Prog Action HE action online will result in the mapped Studielink status value being updated.

Page Name	Definition Name	Navigation	Usage
Start Occasion	SSR_SL_STARTOC_NLD	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Start Occasion, Start Occasion	Define start occasion values for the admit term or type, the academic year, and the start month. The system uses the start occasion values on the Start Occasion page to assign a default start month and start occasion for any applicant added through Student Admissions online.
Start Year	SSR_SL_STARTYR_NLD	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Start Occasion, Start Year	Define start occasion values for the academic year and start month. The system uses the start occasion values on the Start Year page for backwards compatibility only. The start year and start occasion is retrieved from inbound messages or taken from Admissions.
Studielink Language Code Cross-reference	SAD_SL_LANGSETUP	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Language Code Setup	Map language codes to language preferred codes. The system uses this mapping to process both inbound and outbound messages.
Foreign Address Setup	SAD_SL_FORGN_SETUP	Student Admissions, Processing Studielink NLD, Setup Studielink, Set-Up Foreign Address	Define address field mappings which apply to both inbound and outbound messages. Set up mappings for each country or specify one default which applies to all those not included. Control whether inbound messages are suspended.
Studielink Visa/Permit Table	SAD_SL_VISA	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Visa/Permit Table, Studielink Visa/Permit Table	Set up visa/permit status values.

Page Name	Definition Name	Navigation	Usage
Visa/Permit Cross Reference Table	SAD_SL_VISA_CROSS	Student Admissions, Processing Studielink NLD, Setup Studielink, Visa/Permit Cross Reference, Visa/Permit Cross Reference Table	Map visa/permit codes from Campus Solutions to a visa/permit Studielink code.
Studielink Equation Setup	SAD_SL_EQ_SETUP	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Equation Setup	Assign equations to evaluate outbound messages.
User Defaults 1	OPR_DEF_TABLE_CS1	Set Up SACR, User Defaults, User Defaults 1	Set the default academic institution whose student and applicant records you want to process.

Activating Studielink Functionality

Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features).

Installation Student Admin

SA Features

Installation Student Administration

CRM Integration

☐ CRM for Higher Education

Australia

☒ DEST, HECS, Centrelink, TAC Last CART Request ID:

Canada

☒ Government Reporting ☒ OUAC

New Zealand

☒ NSI and SDR Personal Data, SDR Degree

The Netherlands

☒ Use Dutch Functionality

☒ Test Administration Last Test ID Assigned:
Last Test List ID Assigned:
Last Requirement ID Assigned:

☒ Use Int Brin Code with Ext Org

United Kingdom

☒ HESA, UCAS
☒ PBI

SA Features page

Use Int Brin Code with Ext Org

Select this check box to enable mapping of the BRIN Code type *Internal* to External Organization codes on the BRINcode Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD).

Use this setup when students are admitted to academic programs with Prior Education diplomas which have been awarded at your institution BRIN Code.

Setting Up Online Studielink Behavior

Access the Academic Institution 6 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6).

The screenshot shows the 'Academic Institution 6' page for 'PSNLD' at 'PeopleSoft University - NLD'. The page includes tabs for 'Academic Institution 4', 'Academic Institution 5', 'Academic Institution 6', and 'Academic Institution 7'. The 'Effective Date' is '01/01/1900' and the 'Status' is 'Active'. The page lists settings for five countries:

Country	Options
Australia	☐ DEST, HECS, Centrelink, TAC
Canada	☐ Government Reporting
New Zealand	☐ Catalog, SDR, EFTS, StudyLink ☐ NZQA
Netherlands	☒ Higher Education ☒ Studielink Participant
United Kingdom	☐ HESA, UCAS

Academic Institution 6 page

Select the Studielink Participant check box to activate all online Studielink behavior.

Setting Up Prior Education Information

Access the Prior Education Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, Prior Education Table NLD, Prior Education Table).

Prior Education Table

Prior Education00053

Prior Education

Find | View AllFirst1 of 1Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

HAVO N+T

Short Description

HAVO

MBO Code:

Cluster Code:

Prior Education Table page

Studielink may supply Prior Education information in inbound messages. All Prior Education information supplied by Studielink must be set up in the Prior Education Table.

Refer to Studielink documentation on SURF foundation to reference Prior Education data tables.

Setting Up BRINcodes

Access the BRINcode Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD, BRINcode Table).

BRINcode Table

BRINcode20QC

BRINcode Table

Find | View AllFirst1 of 1Last

*Effective Date:

01/01/1900

*Status:

Active

*Brin Type

External

External Org ID

000010002

Brighton High School

Description:

Brighton High School

Permanent Phone Number:

075-8210390

*School Identification Code:

EXT01

BRINcode Table page

Set up BRINcodes of type *Internal* which represent the legislative assigned BRIN number for your institution. Map internal BRINcodes to external organizations if you have multiple legislative BRINcodes in your institution and applicants or students transferring between BRINcodes. Studielink may require the BRINcode information when exchanging Prior Education information for these applicants or students.

Create BRINcodes of type *external* to map to External Organizations schools. Studielink requires BRINcode to be supplied for all Dutch Prior Education data exchanged.

Brin Type Select *External* or *Internal*.

External Org ID This field is available if you select *External* in the Brin Type field or if you select *Internal* in the Brin Type field and the Use Int Brin Code with Ext Org check box is selected on the SA Features page.

Setting Up Sub BRINcodes for BRINcode Locations

Access the Sub-BRINcode Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, SubBrincode Table NLD, Sub-BRINcode Table).

Sub-BRINcode Table

BRINcode 20QC Sub BRINcode 0 External Org ID 000010002

Find | View All First 1 of 1 Last

Effective Date	01/01/1900	*Status	Active
Description	School Office Location		
Location Nbr	1	School Office	

Sub-BRINcode Table page

Location Nbr Select an External Organization location number.

Setting Up Academic Programs for Studielink

This section discusses how to :

- Map education codes to academic programs.
- Assign campus and campus location codes.
- Set up home campus NLD values.

Mapping Education Codes to Academic Programs

The Education Type Code that is contained in many of the Studielink messages identifies the academic program of the student within PeopleSoft Campus Solutions. In order for the appropriate academic program to be assigned to the student, the Studielink education code must be mapped to the valid academic program.

First, the CIP Code Table (Classification of Instructional Programs Code Table) (CIP_CODE_TABLE) component must be used to store all of the Studielink education code values. Institutions should request a complete list of education codes from Studielink. Next, use the Academic Program Table (ACADEMIC_PROG_TBL) component to assign the appropriate CIP code to the academic program that the code represents. Once completed, the Studielink posting process assigns the correct academic program when creating the student's admissions application. This setup is required. Institutions that have implemented CBAP functionality were required to perform the same setup tasks.

Assigning Campus and Campus Location Codes

Each academic program has a campus defined on the Taxonomy/Campus page in the Academic Program Table component. The assigned campus must have an associated location code. The location code must be defined for the correct SetID where the address information is complete. Studielink uses the location assigned to the campus to determine the city location for reporting to Studielink.

Setting Up Home Campus NLD Values

The Dutch Ministry of Education assigns BRINcodes and Sub BRINcodes to each institution. On the Home Campus NLD page, use the Campus group box to assign the Sub BRINcodes and internal BRINcodes to each campus where each academic program is offered. To set up internal BRINcodes, use the BRINcode Table page (Set Up SACR, Foundation Tables, Academic Structure NLD, BRINcode Table NLD). To set up Sub BRINcodes, use the SUB-BRINCODE Table page (Set up SACR, Foundation Tables, Academic Structure NLD, SubBrincodeTable NLD). In the Campus Academic Load group box, enter the approved academic load values for your campus. You must define this information for all Studielink eligible academic programs. When applications for enrollment are sent to the institution from Studielink (Message 03), the posting process uses this information to verify that the program is offered at the institution at the requested location.

Access the Home Campus NLD page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Home Campus NLD).

Taxonomy/Campus		Repeat/Incomplete	Enrollment	Course	Dynamic Date	Home Campus NLD
Academic Institution:		PSNLD	PeopleSoft University - NLD			
Academic Program:		H010	Business Economics			
Find View All First 1 of 1 Last						
Effective Date:		01/01/1900		Status:		Active
Program Norm Units Type						
Completion:		10				
Program Norm Units Type		Months				
Campus Find View All First 1 of 2 Last						
Campus:		AMS	Amsterdam Campus			
Academic Organization:		ECONOMCS	Economics			
BRINcode:		NL02	NLD Brincode 02			
Sub BRINcode:		05				
Campus Academic Load Find View All First 1 of 2 Last						
Campus:		AMS	Amsterdam Campus			
Approved Academic Load:		Full-Time				

Home Campus NLD page

See Also

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Modifying CIP and HEGIS Codes

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Designing Your Academic Structure," Setting Up Campuses

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Defining Programs, Plans, and Subplans"

Setting Up Academic Plans for Studielink

Access the Academic Plan Table page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table).

Academic Plan Table

Print Options

Taxonomy

Owner

Academic Institution:

PSNLD PeopleSoft University - NLD

Academic Plan:

H00001

Find | View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

Academic Program:

H001

Business Economics

Academic Career:

*Academic Plan Type:

Major

*Description:

Business Economics

Short Description:

Bus Econ

First Term Valid:

Degree Offered:

BEC

Bachelor of Economics

*Req Term Default:

Program's Admit Term

*Transcript Level:

Official

Last Prospect Date

Last Admit Term

Evaluate Plan Before Program

Academic Plan Table page

Institutions that participate in Studielink are required to create academic plans that have the same value as the Studielink Alternative Program code values. The Studielink posting process uses the alternative program code value for the default academic plan. If no alternative program code is specified in the message, or if a matching plan is not defined, the system uses the default academic plan assigned for the academic program.

Setting Up BRINcode and Institution Cross-References

Access the BRINcode/Institution Cross-reference page (Student Admissions, Processing Studielink NLD, Setup Studielink, BRINcode/Institution Xref).

BRINcode/Institution Cross-reference

Customize | Find | View All | First | 1-2 of 2 | Last

*BRINcode	*Academic Institution		
NL01	PSNLD	NLD Brincode 01	PeopleSoft University - NLD
NL02	PSNLD	NLD Brincode 02	PeopleSoft University - NLD

BRINcode/Institution Cross-reference page

The Dutch Ministry of Education requires that institutions use their assigned BRINcode in all official communications. Each BRINcode is specific to an institution and a location. Therefore, each institution can have multiple BRINcodes.

The Studielink posting process requires that the valid BRINcodes for each institution are defined in order to correctly identify messages. Messages that contain BRINcodes not defined in this component are not posted to the application tables. The posting process assigns an institution to the student based on the BRINcode that is received.

BRINcode Enter the Dutch Ministry of Education BRINcode that you want to map to your academic institution.

Academic Institution Enter the academic institution that corresponds to the BRINcode.

Setting Up Civil and Marital Status Cross-references

Access the Civil Status/Marital Status Cross-reference page (Student Admissions, Processing Studielink NLD, Setup Studielink, Civil Status/Mar Status Xref).

Civil Status and Marital Status		Customize Find View All	First 1-3 of 3 Last
Civil Status	Marital Status		
0 Unknown	U Unknown		+ -
1 Unmarried, Never Married	S Single		+ -
7 Remaining Registered Partner	W Widowed		+ -

Civil Status/Marital Status Cross-reference page

When student bio-demographic data is updated from Studielink, the civil status that is reported must be mapped to an appropriate PeopleSoft Campus Solutions value. If not, the component interface that updates the PeopleSoft Campus Community tables will fail if it encounters a value that cannot be translated.

Civil Status This value is received from Studielink.

Marital Status Enter the PeopleSoft Campus Solutions value that corresponds to the Studielink value.

Setting Up Search/Match Data

Studielink users must create their own Search/Match rules and search parameters for the posting process. The posting process uses the Search/Match process to determine if an existing EmplID exists for admission application messages received from Studielink.

The following table lists the fields on the admission application Message 03 that are used for executing the Search/Match process. The corresponding search field is defined to assist you to create your institution's Search/Match rules and parameters.

Message 03 Search Fields	Search Field for Creating Search/Match Rules
Street	Address3Rule
City	CityRule
Last Name	LastNameSrchRule
First Name	FirstNameSrchRule
Birthdate	DateOfBirthRule
Sofi Number	NationalIDRule
Gender	GenderRule
CIOP/Correspondence Number	CorrespondenceNBRRule

Additionally, the posting process uses the Studielink Number in the inbound messages to determine if the student's EmplID already exists in the system. The Studielink Number is a unique identifier that Studielink assigns to each applicant.

This section discusses how to:

- Set up Search/Match rules.
- Set up search parameters.
- Set up search permissions.

Setting Up Search Match Rules

Access the Search/Match Rule page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rule).

Search/Match Rule

Search Rule Code: CIOP Search Type: Person

'Description: ☐ Ad Hoc Search

Search Fields						
Sequence	Search Field	Field Description	Required	Usage	Length	
1	CorrespondanceNBRR	Correspondance Number IBG	☒	Equals	12	+ -

Search/Match Rule page

Several Search/ Match rules will probably need to be created to ensure that the Studielink application records are properly evaluated. You must define all your Search/Match rules before you create the search parameters.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Searching for Records and Using Search/Match."

Setting Up Search Parameters

Access the Search Parameters page (Set Up SACR, System Administration, Utilities, Search/Match Parameters, Search Parameters).

Search Parameters | Search Permissions

Search Parameter: PSCS_NLD **Search Type:** Person

Description: Studiellink NLD **Status:** Active ☐ **Ad Hoc Search**

Search/Match Rules					
Search Order	*Search Rule Code	Rule Code Description			
10	NLD_10	Full Name, Birthdate, CIOP	View Definition	+	-
20	NLD_20	CIOP Number	View Definition	+	-
30	NLD_30	Name and address	View Definition	+	-
40	NLD_40	Name Only	View Definition	+	-

Search Parameters page

Enter the search fields in the appropriate search order.

Setting Up Search Permissions

Access the Search Permissions page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions).

Search Parameters | **Search Permissions**

Search Parameter: NLD_STUDIELINK **Search Type:** Person

Description: Studiellink Search Parm's **Status:** Active ☐ **Ad Hoc Search**

Search Parameters Access

☒ **Full Access**

Search/Match Used in Transaction			
	*Component Name	Component Description	
1	SAD_SL_LOAD_PARMS	Studiellink Load Parm's setup	+

Search Permissions page

Select the Full Access check box. Enter *SAD_SL_LOAD_PARMS* in the Component Name field.

This allows the system to select search parameters from the Studielink Process Parameters component and create the Studielink message posting parameter settings.

Setting Up Studielink Address Usage

The three address types that can be communicated between an institution and the Studielink system are billing, mailing, and permanent. The system uses PeopleSoft Campus Community address usage functionality to provide a flexible method for identifying the address type to update when information is received from Studielink. This also controls the address that is sent in messages originating from the institution.

This section discusses how to:

- Set up inbound address usage.
- Set up outbound address usage.

Setting Up Inbound Address Usage

Use the Studielink Inbound Address Usage page to set up how inbound addresses are processed. Inbound messages that contain address or email address use this set up to select which address is stored in the Campus Solutions tables.

Access the Studielink Inbound Address Usage page (Student Admissions, Processing Studielink NLD, Setup Studielink, SL Inbound Address Usage, Studielink Inbound Address Usage).

Studielink Inbound Address Usage

Address Usage Setup

Customize | Find | View All | First 1-3 of 3 Last

*Studielink Address Type	*Address Usage		
Billing	SL_BILLING	+	-
Mailing	SL_MAILING	+	-
Permanent	SL_PERM	+	-

*Email Usage

[Address Usage Table](#)

Studielink Inbound Address Usage page

- Studielink Address Type and Address Usage**

Assign an Address Usage value for each Studielink Address Type value. Address Usage is used to determine the address usage type to use for processing inbound messages that contain one or more Studielink address blocks.
- Email Usage**

Select a usage value that the system uses to determine which email address type should be used to process inbound messages in which a Studielink email address is specified.

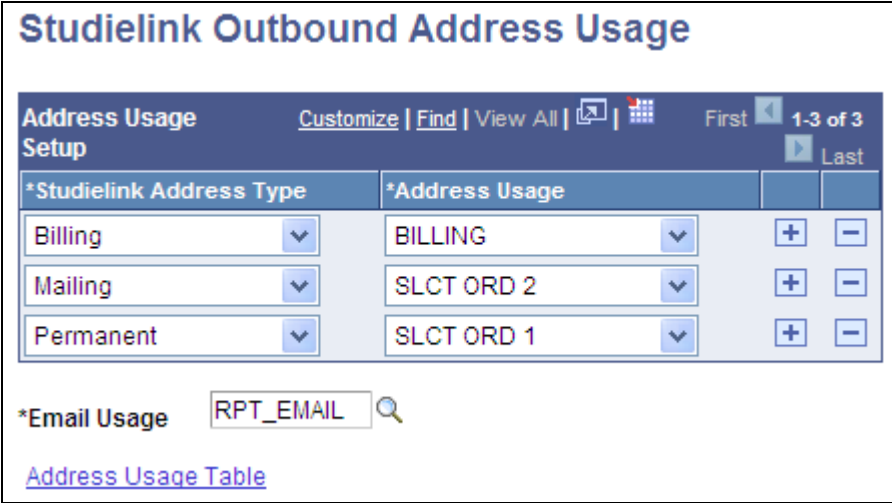
Address Usage Table

Click to access the Address Usage page and create new address and email usage table entries.

Setting Up Outbound Address Usage

Use the Studielink Outbound Address Usage page to set up how outbound addresses are processed. Outbound messages that select address or email address use this set up.

Access the Studielink Outbound Address Usage page (Student Admissions, Processing Studielink NLD, Setup Studielink, SL Outbound Address Usage, Studielink Outbound Address Usage).



Studielink Outbound Address Usage page

Studielink Address Type and Address Usage

Assign an Address Usage value for each Studielink Address Type value.

Email Usage

Select a usage value that the system uses to determine which email address should be used to process outbound messages to Studielink in which a Studielink email address is specified.

Address Usage Table

Click to access the Address Usage page and create new address and email usage table entries.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Designing Campus Community," Establishing Address Usages

Setting Up Studielink Phone Usage

Use the Studielink Inbound Phone usage page and the Studielink Outbound Phone usage page to set up Studielink phone usage.

This section discusses how to:

- Set up inbound phone usage.
- Set up outbound phone usage.

Setting Up Inbound Phone Usage

Access the Studielink Inbound Phone usage page (Student Admissions, Processing Studielink NLD, Setup Studielink, SL Inbound Phone Usage, Studielink Inbound Phone usage).



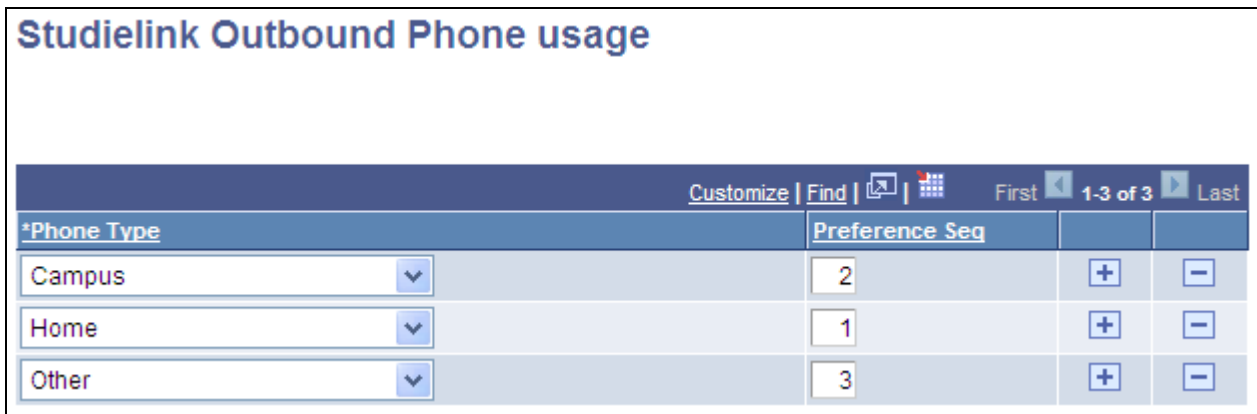
Studielink Inbound Phone usage page

When phone numbers are retrieved from inbound messages, the phone number that is stored in Campus Solutions is based on the phone type that you select here.

If no correct set up is found the inbound message is suspended.

Setting Up Outbound Phone Usage

Access the Studielink Outbound Phone usage page (Student Admissions, Processing Studielink NLD, Setup Studielink, SL Outbound Phone Usage, Studielink Outbound Phone usage).



*Phone Type	Preference Seq		
Campus	2	+	-
Home	1	+	-
Other	3	+	-

Studielink Outbound Phone usage page

The phone number that is allocated to outbound messages is based on the phone type that you select here.

You can enter a preference sequence for each phone type—the first preferred phone number is sent to Studielink; if the first preference is not found, the second preferred phone number is sent, and the process continues until a preferred phone type is found.

If no correct set up is found the outbound message is suspended.

Setting Up Studielink Message Processing Parameters

Access the Studielink Load Parameters page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Load Parameters).

Studielink Load Parameters

*Studielink Version: 3.0

Additional Name Type: PRF

Identification Document: Passport

Administrator Name: Ms Administrator

☒ GBA Names

☒ GBA Verification (04)

☒ Personal Data (05)

☒ Address Change (06)

☒ Update Prior Education (07)

☒ Update Bank Account (08)

☒ Prior Education (10)

☒ Re-Enrollment (25)

☒ Withdrawal request (35)

☒ Death of Student (37)

☒ IBG status (39)

Career Options Find | View All First 1 of 1 Last

*Academic Institution: PSNLD PeopleSoft University - NLD

*Academic Career: BAC Bachelor (NLD)

Application Center: STD Standard

Admit Type: REG Regular

Events or Checklists ☐ Use Events

Application Checklist Code: APPL Admittance

Lot Drawing Checklist Item: LOT01 Lot Drawing Certification

Item Decentralized Drawing: LOT02 Decentral Lot Drawing Cert

Re-enrollment Checklist Code: RENRL Re-Enrollment

Studielink Load Parameters page

This page is used to store the settings used by the posting process to process all messages that are loaded in the staging tables. You must create settings for every academic career at the institution where students are eligible to participate in Studielink.

Studielink Version

Select 3.0 or 2.9.

If you select 3.0, the Correction (End) Enroll (48) check box becomes available on the Studielink Send Parameters page and the Electronic Direct Debit (47) check box becomes available on the Financial Processing page. These check boxes are not available if you select version 2.9.

In addition, message XML formats are adjusted for processing by Studielink version 3.0. Field value 3.0 should be selected only if all inbound and outbound version 2.9 messages have been completely processed and/or manually resolved.

For further information about the XML formats, refer to the Studielink issued documentation.

Additional Name Type

Select the additional name type that will be created when a new student is created in the system. The system always creates the primary name type. This is an optional field.

The value that you select here is used by messages 03, 04, and 05 inbound only to create the additional name type.

If you leave this field blank, the posting process assigns the default name type to new students. To set up default name types, select Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Type Defaults.

GBA Names

Select to have the system add or select data from the GBA Names page for processing outbound message 34 and inbound and outbound message 04.

If you select this check box, FullName field content is used for outbound messages only. The inbound GBA name is always stored even if the check box is not selected.

The GBA Names page enables you to register full length name initials, first names, and last names according to NEN norms. To navigate to the GBA Names page, select Campus Community, Personal Information NLD, Student GBA Names NLD or click the GBA Reporting Names link on the Regional page (Student Admissions, Application Maintenance, Maintain Applications, Regional).

Administrator Name

Enter the name of the administrator to be reported in Message 37 (Death of student).

Identification Document

Enter a value that the system uses as a default value for outbound message 04 if no Identification Document exists for a student on the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD).

GBA Verification (04)

This check box is selected by default.

If the check box is cleared, inbound message 04 is not processed into Campus Solutions tables. The message status in the staging table is set to *skipped* by the SAD_SL_IN process.

Note. All other message related check boxes in this section of the Studielink Load Parameters page function in a similar way to the GBA Verification (04) check box.

Career Options

These options must be created for each academic career that participates in Studielink.

Academic Institution and Academic Career

Enter the academic institution and career for which the following settings apply. The system processes the inbound messages only if you enter an academic institution and career here.

Application Center

Enter the default application center assigned during the creation of the admissions application.

Admit Type

Enter the default admit type assigned during the creation of the admissions application. The system uses the default admit type if the Start Occasion value for the admit type is not available on the Studielink Start Occasion page. For example, the admit type is REG, the default admit type is FIRSTYR, and the Start Occasion value does not exist for REG. In this case, the system uses the Start Occasion value that has been set up for the default admit type FIRSTYR.

Events or Checklists**Application Checklist Code**

Enter the checklist to be assigned during the processing of Message 03.

Note. You can only select checklists that have been defined for administrative functions: *ADMA* or *ADMP*.

Lot Drawing Checklist Item

Enter an additional checklist item assigned for Central lot drawing candidates who have been selected for admission. This requires the applications checklist code to be populated.

Decentral Drawing Checklist Item

Enter a checklist item assigned when Message 39 is processed and the lot drawing result is set to *Selected (decentralized)*, *Locally Selected*, or *Locally Drawn* on the Application Regional page. This requires an applications checklist code to be assigned to the student.

Re-enrollment Checklist Code	Enter an optional checklist to be created upon posting of Message 25.
	Note. You can only select checklists that have been defined for administrative function <i>SPRG</i> .

If you select the Use Events check box, the 3c Events Definitions group box appears.

3C Events Definition

Select the Use Events check box if you want to use the 3C event feature to process inbound Studielink messages. The 3C event feature enables you to set up and use multiple checklists, comments and communications for Studielink processing.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the 3C Engine."

The following example shows the Studielink Load Parameters page with the 3c Events Definitions group box.

Studielink Load Options

Studielink SearchMatch Setup

Studielink Send Parameters

Financial Processing

Studielink Load Parameters

-

*Studielink Version:

Additional Name Type:

Identification Document:

Administrator Name:

☒ GBA Names

☒ GBA Verification (04)

☒ Personal Data (05)

☒ Address Change (06)

☒ Update Prior Education (07)

☒ Update Bank Account (08)

☒ Prior Education (10)

☒ Re-Enrollment (25)

☒ Withdrawal request (35)

☒ Death of Student (37)

☒ IBG status (39)

Career Options

Find | View All First 1 of 1 Last

*Academic Institution: PeopleSoft University - NLD

*Academic Career: Bachelor (NLD)

Application Center: Standard

Admit Type: Regular

Events or Checklists

☒ Use Events

3c Events Definitions

Customize | Find | First 1 of 1 Last

	*Event ID	Administrative Function	Description
1			

Studielink Load Parameters page (with the 3c Events Definitions box)

Event ID

Enter one or multiple event IDs for administrative functions ADMA, ADMP or SPRG. The system uses the EventID that you enter here to process events of administrative function types:

- ADMA and ADMP for Inbound Message 03.
- SPRG for Inbound Message 25.

Setting Up Studielink Search/Match Parameters

Access the Studielink Search/Match Parameters page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Search/Match Parameters).

Studielink Load Options

Studielink SearchMatch Setup

Studielink Send Parameters

Financial Processing

Studielink Search/Match Parameters

*Search Parameter:

STUDIELINK

studielink

No Match

New:

Add

Update

Suspend

Match(es) Found

Find

View All

First

1 of 1

Last

Order Nbr: 10 studiellink

One Match:

Studielink Search/Match Parameters page

Assign the Add, Update, or Suspend settings for the search parameters.

Search Parameter

Select from the parameters that were created in the Search Parameters page. Only parameters with search permissions granted to the SAD_SL_LOAD_PARMs component can be selected.

When multiple matches occur for the same rule, the system suspends the record.

Setting Up Studielink Send Parameters

Access the Studielink Send Parameters page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Send Parameters).

Studielink SearchMatch Setup

Studielink Send Parameters

Financial Processing

Studielink Send Parameters

☒ GBA Verification (04)

☒ Prior Education (10)

☒ Address Change (06)

☒ Receipt of Application (31A)

☒ Confirm Enrollment (31B)

Trigger 31B

Accepted

Selection 31B

Accepted

☒ Confirm Re-enrollment (31C)

Trigger 31C

Accepted

Selection 31C

Accepted

☒ Discontinue Not Allowed (31D)

☒ Withdrawal Confirmed (31G)

☒ Discontinuation Allowed (31E)

[Student Records Cancel Setup](#)

☒ Non First Year (31H)

☒ Professional Duties (31I)

☒ Language Test (31J)

☒ Prior Ed Deficiency (31K)

☒ Lot Drawing Result (31N)

☒ Phase Change (31O)

☒ Profession Requirements (31P)

☒ Confirmation Receipt (31Q)

☐ Death of Student (37)

☐ Correction (End) Enroll (48)

[Admissions Withdrawal Set-up](#)

GBA Verification

FindFirst1 of 1Last

ID Verification Status:

Dont allow local Verification

+ -

Trigger Status Message 10

FindFirst1-2 of 2Last

Prior Ed Verified Status:

Decentralized diploma

+ -

Prior Ed Verified Status:

Centralized Diploma

+ -

Studielink Send Parameters page (1 of 2)

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Trigger Status Message 31I		Find	First	1 of 1	Last
Professional Duties Status:	Not applicable				+ -
Trigger Status Message 31J		Find	First	1 of 1	Last
Language Test Status:	Not applicable				+ -
Trigger Status Message 31K		Find	First	1 of 1	Last
Deficiency Status:	Deficient via IBG counter				+ -
Trigger Status Message 31N		Find	First	1 of 1	Last
Lot Drawing Result:	Centrally Drawn				+ -
Trigger Status Message 31P		Find	First	1 of 1	Last
Prof Requirements Status:	Not Applicable				+ -

Studielink Send Parameters page (2 of 2)

For information about how messages are generated and sent to Studielink:

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, (NLD) Managing Studielink, Managing Outbound Messages

Message Check Boxes 06, 31A, 31D, 31H, 31O, 31Q, and 37

The following information relates to these message check boxes:

- Address Change (06)
- Receipt of Application (31A)
- Discontinue Not Allowed (31D)
- Non First Year (31H)
- Phase Change (31O)
- Confirmation Receipt (31Q)
- Death of Student (37)

The check boxes are selected by default.

If you clear a check box:

- The outbound message is not processed from Campus Solutions tables by the SAD_SL_OUT outbound process or created in staging tables.
- The outbound message can *not* be triggered manually from the Studielink Transmission Override page—the relevant check box is not available on the page.

- Outbound messages 31H and 31O can *not* be triggered from the Admissions Application Regional page (Student Admissions, Application Maintenance, Maintain Applications, Application Regional) or the Student Records Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD, Academic Prog Higher Education)—the relevant check box is not available on the page. Other messages listed here are never available to trigger from these pages.

Message Check Boxes 04, 10, 31I, 31J, 31K, 31N, and 31P

The following information relates to these message check boxes :

- GBA Verification (04)
- Prior Education (10)
- Professional Duties (31I)
- Language Test (31J)
- Prior Ed Deficiency (31K)
- Lot Drawing Result (31N)
- Profession Requirements (31P)

The check boxes are selected by default.

If you clear a check box:

- The outbound message is not processed from Campus Solutions tables by the SAD_SL_OUT outbound process or created in staging tables.
- The outbound message can *not* be triggered manually from the Studielink Transmission Override page—the relevant check box is not available on the page.
- The outbound message can *not* be triggered manually from the Admissions Application Regional page or Student Records Academic Prog Higher Education page—the relevant check box is not available on the page.

If a check box is selected, a related Trigger Status setup group box becomes available. Use this group box to set up the status that triggers the message. For example, you select a value in the ID Verification Status field on this setup page. If the ID Verification status on the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD, Administer Student Higher Education) is updated, and the updated status is the same as the status on this setup page, message 04 is triggered when you save the component. Business logic uses the previous row (effective date or effective sequence) to evaluate whether the field has been changed.

Message Check Box 31B

The Confirm Enrollment (31B) check box controls whether message 31B is sent.

If the Confirm Enrollment (31B) check box is selected, the Trigger 31B and Selection 31B fields become available.

The Trigger 31B field controls whether message 31B is automatically triggered when certain conditions are met.

The Selection 31B field controls what data is included when message 31B is sent.

You do not have to enter a value in the Trigger 31B field—for example, you might use the equation engine instead to trigger the message.

If the following conditions are met, message 31B is triggered *automatically* in the transmit table:

1. The Confirm Enrollment (31B) check box is selected.
2. The updated program action matches the value that is entered in the Trigger 31B field on this setup page. Business logic in place to evaluate change compares the current row with the previous row (effective date or effective sequence).
3. A program action is updated on the Application Program Data page (Student Admissions, Maintain Applications, Application Maintenance or Student Admissions, Application Entry) or the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Education NLD).

If the following conditions are met, message 31B can be triggered *via equation engine or manually*:

1. The Confirm Enrollment (31B) check box is selected.
2. The Evaluation process is run and an equation engine has been created for message 31B. The equation engine criteria are met and message 31B is triggered (for more information refer to the Setting Up Studielink Message Equations and Understanding How Messages to Studielink Are Generated sections in this chapter) or message 31B is triggered manually from the Student Transmission Override page (Student Admissions, Processing Studielink NLD, Student Transmission Override).

Whether message 31B is triggered automatically or manually, if the Confirm Enrollment (31B) check box is selected, then you must enter a value in the Selection 31B field—when the message is sent, data is selected from Admissions or Student Records HE based on the field value in the Selection 31B field.

Message Check Box 31C

The Confirm Re-enrollment (31C) check box controls whether message 31C is sent.

If the Confirm Re-enrollment (31C) check box is selected, the Trigger 31C and Selection 31C fields become available.

The Trigger 31C field controls whether message 31C is automatically triggered when certain conditions are met.

The Selection 31C field controls what data is included when message 31C is sent.

You do not have to enter a value in the Trigger 31C field—for example, you might use the equation engine instead to trigger the message.

If the following conditions are met, message 31C is triggered automatically in the transmit table.

1. The Confirm Re-enrollment (31C) check box is selected.
2. A program action is updated on the Academic Prog Higher Education page.
3. The Academic Year on the Academic Prog Higher Education page must be greater than the First Year Higher Education field on the Administer Student Higher Education page.

4. The updated program action matches the value that is selected in the Trigger 31C field on this setup page.

If the following conditions are met, message 31C can be triggered *via equation engine or manually*:

1. The Confirm Re-enrollment (31C) check box is selected.
2. The Evaluation Process is run and an equation engine has been created for message 31C. The equation engine criteria are met and message 31C is triggered (for more information refer to Setting Up Studielink Message Equations and Understanding How Messages to Studielink Are Generated sections in this chapter) or message 31C is triggered manually from the Student Transmission Override page (Student Admissions, Processing Studielink NLD, Student Transmission override).

Whether the message is triggered automatically or manually, if the Confirm Re-enrollment (31C) check box is selected, then you must enter a value in the Selection 31C field—when the message is sent, data is selected from Student Records HE based on the field value in the Selection 31C field.

Message Check Box 31G

If the Withdrawal Confirmed (31G) check box is selected, the Admissions Withdrawal Set-up link becomes available. Select this link to access the Admissions Program Action & Studielink Status Mapping page (Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Admissions Program Action & Studielink Status Mapping).

For more information about this page, refer to the Setting Up Withdrawal Action Reasons section later in this chapter.

If the following conditions are met, message 31G is triggered:

1. This check box is selected.
2. The Program Action field on the Application Program Data page (Student Admissions, Application Maintenance, Maintain Applications, Application Program Data) is updated.
3. The updated program action matches the value in the Admission Withdrawal Action field on the Admissions Program Action & Studielink Status Mapping page.

Business logic in place to evaluate change compares the current row with the previous row (effective date or effective sequence).

Message Check Box 31E

If you select the Discontinuation Allowed (31E) check box, the Student Records Cancel Setup link becomes available. Select this link to access the Student Records Program Action & Studielink Status Mapping page (Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Student Records Program Action & Studielink Status Mapping).

For more information about this page, refer to the Setting Up Withdrawal Action Reasons section later in this chapter.

If the following conditions are met, message 31E is triggered:

1. This check box is selected.
2. The Program Action field is updated on the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program).

3. The updated status matches a value in the Records Withdrawal Action field on the Student Records Program Action & Studielink Status Mapping page.
4. The Generate Studielink Messages process (Student Admissions, Processing Studielink NLD, Process Studielink, Generate Studielink Messages) checks to see whether a row is present in Student Records HE (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD) which matches the program action HE from setup. If no entry is found, the value from setup is used to create a row into the Student Records HE table.

Message Check Box 48

The Correction (End) Enroll (48) check box is available only if 3.0 is selected in the Studielink Version field on the Studielink Load Parameters page.

If the Correction (End) Enroll (48) check box is selected, the Studielink Correction Status link becomes available. Click this link to access the Msg 48 Admission Correction page and the Msg 48 Student Records Correction pages.

For further information about these pages:

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, (NLD) Managing Studielink, Setting Up Correction of Cancellation/End of Enrollment Action Reasons

Setting Up Studielink Financial Parameters

Access the Studielink Financial Parameters page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Process Parameters, Studielink Financial Parameters).

Studielink SearchMatch Setup | Studielink Send Parameters | **Financial Processing**

Studielink Financial Parameters

☒ Payment of Fees (19)
 ☒ Electronic Direct Debit (47)

☒ Cost of Fees (20)
 ☒ Create Payment Row

☒ Payment of Fees(19) Inbound
 Prog Action HE Payment
☒ Send Message 19 automatically

Details Find | View All First 1 of 1 Last

*Academic Institution: PeopleSoft University - NLD
 *Academic Career: Bachelor (NLD)
 *Financial Message Handling: Process from Studielink Table
 *Business Unit: PSNLD
 Contract Number: NLBU1003

Studielink Financial Parameters page

Payment of Fees (19) and Cost of Fees (20) The check box is selected by default.

If the check box is cleared:

- The message is not processed from Campus Solutions tables by the SAD_SL_OUT outbound process or created in the staging tables.
- The message can *not* be triggered from the Studielink Transmission Override page (the check box is not available for edit).
- The message can *not* be triggered from Admissions Application Regional page or Student Records Academic Prog Higher Education page—the field does not appear on the page.

Warning! If you have set up Tuition flat fee amounts using the Studielink mid office, do *not* select outbound message 20 functionality.

- Payment of Fees(19) Inbound** The check box is selected by default.
If the check box is cleared:
- The message is not processed into Campus Solutions tables.
 - The message status in the staging table is set to *skipped* by the SAD_SL_IN process.
- Electronic Direct Debit (47)** Message 47 is available only if 3.0 is selected in the Studielink Version field on the Studielink Load Parameters page.
Message 47 is sent from Studielink to Campus Solutions if the student signs the online direct debit statement on the Studielink site.
The Electronic Direct Debit (47) check box is selected by default.
Clear the check box if you do not want to use this functionality.
If the check box is cleared:
- The message is not processed into Campus Solutions tables.
 - The message status in the staging table is set to *skipped* by the SAD_SL_IN process.
- If the check box is selected, two other check boxes become available: Send Msg 19 Automatically and Create Payment Row.
- Send Msg 19 Automatically** The check box is cleared by default.
If the check box is selected:
- Inbound message 47 automatically triggers message 19 outbound.
 - Message 19 outbound values are taken from the processed row.
- Create Payment Row** The check box is cleared by default.
If the check box is selected:
- The Prog Action HE field becomes available.
 - Example: Program Action HE field contains the value *PAYM*. When message 47 is processed, a payment row is automatically created to indicate that tuition fees have been paid.

Details

Financial Message Handling	Select a value: <i>Process from Student Fin.</i> or <i>Process from Studielink Table</i>. If you select <i>Process from Student Fin.</i> the following rules apply: 1. The tuition amount is selected from Student Financials (ITEM_SF) based on the Item Type and Account Type or Item Type Group field values from setup by the outbound process when processing outbound messages 19 or 20. The amount in the Payment Amount field on Application Regional page and/or Academic Prog Higher Education page are ignored. 2. When setting the Payment Indicator value to <i>Paid</i> on the Application Regional page and/or Academic Prog Higher Education page, the amount is taken from Student Financials (ITEM_SF) based on setup and pre-populated into the Payment Amount field. A warning appears if the Student Account balance is not equal to zero.
Business Unit	Select a business unit to enable contract number selection.
Contract Number	This field is available only if <i>Process from Studielink Table</i> is selected in the Financial Message Handling field. Specify the default contract number. The specified contract will determine administrative costs and payment terms as delivered in outbound message 20. You must also set up payment plan terms and fees (Student Financials, Payment Plans, Payment Plan, Create) to enable contract number selection.
Item Type	The Item Type option, within the Options group box, is available only if <i>Process from Student Fin</i> is selected in the Financial Message Handling field. If you select the Item Type option, the Account Type and Item Type fields become available. Enter one or more account types and item types. The account type and item type that you enter are used to select amounts from Student Financials (ITEM_SF) for students to be used in Studielink processing of messages 19 and 20.
Item Type Group	The Item Type Group option, within the Options group box, is available only if <i>Process from Student Fin</i> is selected in the Financial Message Handling field. If you select the Item Type Group option, the Item Type Group field becomes available. The item type group that you enter is used to select amounts from Student Financials (ITEM_SF) for students to be used in Studielink processing of messages 19 and 20.

Setting Up Admissions Online Status Handling

Access the Admissions Online Status Handling page (Student Admissions, Processing Studielink NLD, Setup Studielink, Admission Online Status Values, Admissions Online Status Handling).

Admissions Online Status Handling						
Customize Find View All First 1-6 of 7 Last						
	*Admission Action	Description	*Studielink Status	Description		
1	ADRV	Admission Revocation	G	Cancelled/Withdrawn		
2	APPL	Application	V	Enrollment Requested		
3	DATA	Data Change	U	Departed		
4	DENY	Deny	R	Rejected/Denied		
5	RAPP	Readmit Application	V	Enrollment Requested		
6	WADM	Administrative Withdrawal	G	Cancelled/Withdrawn		

Admissions Online Status Handling page

Use this page to map an Admissions program action to a Studielink status so that the Studielink status is automatically updated when a program action is updated.

The Admissions Online Status values must be set up in order to control which Studielink status is updated online.

For example, if a value of *WADM* is entered in the Program Action field on the Application Program Data page, the Studielink Status field on the Application Regional page is updated to *G*. The update is done when the field change action occurs which means that the user can override the status value before saving the page.

Setting Up Student Records Online Status Handling

Access the Student Records Online Status Handling page (Student Admissions, Processing Studielink NLD, Setup Studielink, Records Online Status Values, Student Records Online Status Handling).

Student Records Online Status Handling					
Details			Customize Find View All  		
			First  1-6 of 6  Last		
	*Prog Action HE	Description	*Studielink Status	Description	
1	CENR 	Change Enrollment	I 	Registered/Enrolled	 
2	DSAC 	Departure Accepted	U 	Departed	 
3	DSNA 	Departure Not Accepted	I 	Registered/Enrolled	 
4	NRNR 	No Re-Enrollment	U 	Departed	 
5	PAYM 	Payment	I 	Registered/Enrolled	 
6	RENR 	Re-Enrollment	V 	Enrollment Requested	 

Student Records Online Status Handling page

Use this page to map a Student Records higher education program action to a Studielink status so that the Studielink status is automatically updated when a higher education program action is updated.

For example, if a value of *DSAC* is entered in the Prog Action Higher Education field on the Academic Prog Higher Education page, the Studielink Status field on the Academic Prog Higher Education page is updated to *U*.

Setting Up Withdrawal Action Reasons

This section discusses two setup pages, the Admissions Program Action & Studielink Status Mapping page and the Student Records Program Action & Studielink Status Mapping page, which enable you to map program actions and action reasons for withdrawals to Studielink statuses and end reasons.

The following rules apply to this mapping.

- For the mapping, the program action is a required field but action reason is an optional field.
- When Studielink sends message 35 that contains a Studielink end reason and Studielink status, the system updates the Campus Solutions application or student records enrollment record with the mapped program action and action reason. For example, suppose you have mapped program action *WADM* and action reason *DEAT* to Studielink status *U* and end reason *8*. When message 35 that contains the values *U* and *8* is received, the system updates the corresponding application record with the program action *WADM* and action reason *DEAT*.
- You should map each Studielink status to a Campus Solutions program action with the Inbound Default check box selected (action reason is not required). If the Generate Studielink Message process cannot find a mapped program action based on the Studielink status and Studielink end reason, then it selects the default Campus Solutions program action for the Studielink status. For example, suppose you have mapped program action *WADM* to Studielink status *U* with no end reason and action reason mapping. You have selected the Inbound Default check box for this mapping. When message 35 is received that contains the Studielink status *U* and end reason *8*, the system updates the corresponding application record with the program action *WADM* and leaves the action reason empty.

- The Generate Studielink Message process uses the mapping from Admissions Program Action & Studielink Status Mapping and Student Records Program Action & Studielink Status Mapping respectively, to generate the 31G (Withdrawal Confirmed) and 31E (Discontinuation Allowed) outbound messages.
- For 31G, the process first selects the program action and the action reason in the Campus Solutions application record. Then, it retrieves the end reason, Studielink status, and the Request for refund value that has been mapped to the selected program action and action reason.
- For 31E, the process first selects the program action and action reason from the Student Program/Plan record. Then, it retrieves the end reason and Studielink status that has been mapped to the selected program action reason. If a row does not exist in the Academic Prog Higher Education page, then the process inserts a row with a Prog Action Higher Ed value that has been mapped to the selected program action reason.
- When changing the program action (and action reason) in the Campus Solutions application record, the system derives the Studielink status value on the Application Regional page from the Admissions Program Action & Studielink Status Mapping page.
- You should include program action *COMP* in the Student Records Program Action & Studielink Status Mapping page only to process the outbound message 31E. The *COMP* program action should *not* be used for inbound (default) processing.

Setting Up Withdrawal Action Reasons For Applicants

Access the Admissions Program Action & Studielink Status Mapping page (Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Admissions Program Action & Studielink Status Mapping).

Admissions Setup

Student Records Setup

Admissions Program Action & Studielink Status Mapping

Customize | Find | View All |

First 1-5 of 5 Last

*Admission Withdrawal Action	Description	Action Reason	Description	*Studielink Status	Description	Inbound Default	*Request for Refund	End Reason	Description		
1 DENY	Deny			R	Rejected/Denied	☐	False	3	Article 7.42.1c		
2 WADM	Administrative Withdrawal			G	Cancelled/Withdrawn	☒	True				
3 WADM	Administrative Withdrawal	DEAT	Deceased	U	Departed	☐	False	8	Death of Student		
4 WADM	Administrative Withdrawal	NRSP	No Response	G	Cancelled/Withdrawn	☐	False	2	Article 7.42.1d		
5 WAPP	Applicant Withdrawal			S	Study Suspended	☐	True	1	Article 7.42.1a		

Admissions Program Action & Studielink Status Mapping page

Setting Up Withdrawal Action Reasons For Students

Access the Student Records Program Action & Studielink Status Mapping page (Student Admissions, Processing Studielink NLD, Setup Studielink, Withdrawal Action Mapping, Student Records Program Action & Studielink Status Mapping).

Admissions Setup

Student Records Setup

Student Records Program Action & Studielink Status Mapping

Customize | Find | View All | First 1-4 of 4 | Last

	Records Withdrawal Action	Description	Action Reason	Description	Studielink Status	Description	Inbound Default	Request for Refund	Prog Action HE	Description	End Reason	Description		
1	COMP	Completion of Program			U	Departed		False	EXAM	Examination	6	Post Exam	+	-
2	DISC	Discontinuation	DEAT	Death	U	Departed		False	DSAC	Departure Accepted	8	Death of Student	+	-
3	DISM	Dismissal			R	Rejected/Denied		False	DSAC	Departure Accepted	3	Article 7.42.1c	+	-
4	WADM	Administrative Withdrawal			U	Departed		False	DSAC	Departure Accepted			+	-

Student Records Program Action & Studielink Status Mapping page

As of Studielink version 3.0 the Request for Refund field is no longer communicated to Studielink for applicants or students, however the field remains present and required due to backwards compatibility with version 2.9.

Setting Up Correction of Cancellation/End of Enrollment Action Reasons

Use the Msg 48 Admission Correction and Msg 48 Student Records Correction pages to map a program action and reason to a Studielink correction status.

Refer to Studielink documentation published by SURF Foundation to determine in which cases message 48 may be sent to Studielink. It is recommended that this message is used only when no other correction method is available.

The following rules apply to this mapping:

- The Studielink Correction Status field is a different field from the Studielink Status field. The Studielink Status field is available on the Application Regional page and Academic Prog Higher Education page whereas the Studielink Correction Status field is not. The field is derived from setup and used by the outbound process only.
- For the mapping, both the program action and action reason fields are required.
- The program action and action reason fields used in this setup must be unique and should only be used to trigger message 48 corrections. Do not use the same program action and or action reason mappings that have been set up for messages 31G or 31E.
- The Generate Studielink Message process uses this mapping to generate the 48 outbound message.

Studielink Correction Status

If the Studielink Correction Status is *Cancelled/Withdrawn,Departed, or Revoked*:

- When processing an applicant, the process first selects the program action and action reason in the Campus Solutions application record. Then, it retrieves the Studielink Correction status from the setup that has been mapped to the selected program action and action reason.
- When processing a student, the process first selects the program action and action reason from the academic program record. Then, it retrieves the Studielink Correction status as well as the program action HE field from the setup that has been mapped to the selected program action and action reason. If a row does not exist in the Academic Prog Higher Education page with a matching program action HE, then the process inserts a row with a Prog Action Higher Ed value that has been mapped to the selected program action and action reason.

If the Studielink Correction Status is *Data Change*:

- When processing an applicant, the process first selects the effective date, program action, and action reason in the Campus Solutions application record. Then, it retrieves the Studielink Correction status from the setup that has been mapped to the selected program action and action reason. The effective date is sent as a Corrected Date value.
- When processing a student the process first selects the effective date, program action, and action reason from the academic program record. Then, it retrieves the Studielink Correction status as well as the program action HE field from set up that has been mapped to the selected program action and action reason. The effective date is sent as Corrected Date value. If a row does not exist in the Academic Prog Higher Education page with matching program action HE, then the process inserts a row with a Prog Action Higher Ed value that has been mapped to the selected program action and action reason.

Setting Up Admissions Correction Action Reasons

Access the Msg 48 Admission Correction page (click the Studielink Correction Status link on the Studielink Send Parameters page).

Correct Admission

Correct Student Records

Msg 48 Admission Correction

Customize | Find | View All |

First 1-2 of 2 Last

	*Program Action	Description	*Action Reason	Description	*Studielink Correction Status	Description		
1	APPL	Application	CORR	Correction	W	Revoked	+	-
2	WADM	Administrative Withdrawal	RS1	RS1	U	Departed	+	-

Msg 48 Admission Correction page

Studielink Correction Status Values are:

- *D: Date Change*
- *G: Cancelled/Withdrawn*
- *U: Departed*
- *W: Revoked*

Setting Up Student Records Correction Action Reasons

Access the Msg 48 Student Records Correction page (click the Studielink Correction Status link on the Studielink Send Parameters page).

Correct Admission

Correct Student Records

Msg 48 Student Records Correction

Customize Find View All First 1-2 of 2 Last									
	Program Action	Description	Action Reason	Description	Studielinek Correction Status	Description	*Progr Action Higher Education	Description	
1	DISC	Discontinuation	CORR	Correction	W	Revoked	CENR	Change Enrollment	+ -
2	RADM	Readmit	CORR	Correction	D	Date Change	CENR	Change Enrollment	+ -

Msg 48 Student Records Correction page

Progr Action Higher Education

When the correction applies to a student not an applicant, this status is used by the Studielink outbound process to synchronize the Progr Action Higher Education value (on the Academic Prog Higher Education page) with the Program Action value on the Student Program page.

Setting Up Studielink Start Occasion

The system uses the Start Occasion fields in the Start Occasion and Start Year pages to process inbound and outbound messages. Studielink enforces the "Instroom moment" that exists in the Studielink admission application. Therefore, the Campus Solutions Start Occasion values must have been set up to match the "Instroom moment" value in the Studielink admission application.

Access the Start Occasion page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Start Occasion, Start Occasion).

Start Occasion

Start Year

Studielink Start Occasion

*Academic Institution

PSNLD  PeopleSoft University - NLD

*Start Option:

Admit Term 

*Start Month Option:

Manual 

Customize | Find | View All |  First  1-6 of 6  Last

	Admit Term	Academic Year	Start Occasion	Start Date (Month)		
1	2040 	2004 	reg.2004	9		
2	2050 	2005 	reg.2005	9		
3	2060 	2006 	reg.2006	9		
4	2070 	2007 	reg.2007	9		
5	2080 	2008 	reg.2008	9		
6	2090 	2009 	reg.2009	9		

Start Occasion page

Use the Start Occasion page to set up a Start Occasion that is relevant for applicants when new applicants are entered online via Student Admissions, Application Entry. To retrieve the Start Occasion values for these applicants, the system finds the Start Occasion value for the relevant admit term or admit type for an academic year and start month set up on the Start Occasion page.

The system finds the applicant's Start Month from the Application Regional Page.

- Academic Institution

Select the Studielink participating institution for which you want to set up the start occasion values.
- Start Option

Select *Admit Term* or *Admit Type* to define Start Occasion values for one or more admit terms or admit types respectively.
- Start Month Option

If you select *Manual*, the *Start Date (Month)* field appears and the system uses the value you enter in the *Start Date (Month)* field. The *Effective Date* value does not have any effect on the system.
- Academic Year, Admit Term, and Admit Type

Enter the admit term or type and academic year for which you want to define start occasion values.
- Start Occasion

Specify the Unique Start Occasion, which must match the Studielink "Instroom moment" that exists in the Studielink admission application.
- Start Date (Month)

Enter the month for the start occasion.

Access the Start Year page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Start Occasion, Start Year).

Start Occasion

Start Year

Studielink Start Occasion

*Academic Institution PeopleSoft University - NLD

Customize | Find | View All | First 1-10 of 18 Last

	*Academic Year	*Start Date (Month)	Start Occasion		
1	2004	2	reg.2004	+	-
2	2004	9	reg.2004	+	-
3	2004	10	reg.2004	+	-
4	2005	2	reg.2005	+	-
5	2005	9	reg.2005	+	-
6	2005	10	reg.2005	+	-
7	2006	2	reg.2006	+	-
8	2006	9	reg.2006	+	-
9	2006	10	reg.2006	+	-
10	2007	2	reg.2007	+	-

Start Year page

Use the Start Year page to set up Start Occasion values, for students, who after matriculation have been re-enrolled for a consecutive academic year. You can re-enroll a student for a consecutive year by entering a effective dated row with the *REN*R program action in the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). To retrieve the start occasion value for these type of students, the system assesses the student's Start Month from the effective date of the Student Records Higher Education row that has a program action of RENR. Then the system selects the start occasion value for the Start Month that is defined in the Start Year page.

Descriptions for fields in the Start Year page are similar to the fields in the Start Occasion page. The system uses the start occasion values on the Start Year page for backwards compatibility only. The start year and start occasion is retrieved from inbound messages or taken from Admissions.

Setting Up Program Action Reason Codes

You must set up several program action reason codes for Studielink admissions and enrollment processing. The values are assigned by the managing of Studielink messages by the posting process, or by users as they update a student's admissions application or enrollment status. These codes provide you with more meaningful descriptions when data is modified within the Maintain Applications (ADM_APPL_MAINTNCE) component.

See [Chapter 11, "Setting Up Admissions Program Actions and Program Action Reasons," page 111.](#)

The following table lists program action reason codes used in Studielink processing that must be set up by the school:

<i>Program Action</i>	<i>Program Action Reason Code</i>	<i>Description</i>	<i>Usage</i>
APPL	SL03	Studielink Application Receipt	When posting Message 03 information in the Maintain Applications component.
APPL	SL34	Studielink Application Created	When manually entering an admissions application for transmission to Studielink.
DATA	SL08	Studielink Message 08 NLD	When posting Message 08 information in the Maintain Applications component.
DATA	SLAR	Studielink Application Review	Manually selected when inserting a new DATA row in the Maintain Applications component.
WAPP	SL35	Studielink Message 35 NLD	When posting Message 35 information in the Maintain Applications component.
WADM	SL35	Studielink Message 35 NLD	When posting Message 35 information in the Maintain Applications component.
DATA	SL39	Studielink Message 39 NLD	When posting Message 39 information in the Maintain Applications component.

Failure to enter the listed reason codes will not cause any Studielink processes to fail, but the action reason will not be visible to the user.

Mapping Language Codes to Language Preferred Codes

Access the Studielink Language Code Cross-reference page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Language Code Setup, Studielink Language Code Cross-reference).

Studielink Language Code Cross-reference

Language code and Language preferred				Customize Find View All [Grid Icon] [List Icon]		First	1-3 of 3	Last
Language Code		Language Preferred						
Dutch	Dutch	DE	German	+	-			
English	English	EN	English	+	-			
German	German	NL	Dutch	+	-			

Inbound Language Code and Language Preferred				Customize Find View All [Grid Icon] [List Icon]		First	1 of 1	Last
Language Code		Language Preferred						
				+	-			

Studielink Language Code Cross-reference page

Language code and Language preferred

Select one campus solutions language code and map against a unique Studielink Language Preferred value.

Inbound Language Code and Language Preferred

One campus solutions language code can be mapped against multiple of the same Language Preferred value. This setup allows institutions who offer limited language usages to process multiple Studielink preferred languages to one and the same Language Code.

Setting up Foreign Addresses

Access the Foreign Address Setup page (Student Admissions, Processing Studielink NLD, Setup Studielink, Set-Up Foreign Address, Foreign Address Setup).

Foreign Address Setup

Academic Institution: PSNLD

☐ Suspend InboundForeign Address

Find First ◀ 1-3 of 3 ▶ Last

*Country ☒ Default Address Format + -

Foreign Address Mapping						Customize Find First ◀ 1-3 of 3 ▶ Last	
	*Foreign Address	*Address 1	Address 2	Address 3			
1	SAD_SL_FORGN_ADDR1	ADDRESS3	NUM1	NUM2			
2	SAD_SL_FORGN_ADDR2	ADDRESS2					
3	SAD_SL_FORGN_ADDR3	CITY	POSTAL				

Foreign Address Setup page (1 of 2)

*Country ☐ Default Address Format + -

Foreign Address Mapping						Customize Find First ◀ 1-3 of 3 ▶ Last	
	*Foreign Address	*Address 1	Address 2	Address 3			
1	SAD_SL_FORGN_ADDR1	ADDRESS1	NUM1	NUM2			
2	SAD_SL_FORGN_ADDR2	ADDRESS2					
3	SAD_SL_FORGN_ADDR3	CITY	POSTAL				

*Country ☐ Default Address Format + -

Foreign Address Mapping						Customize Find First ◀ 1-3 of 3 ▶ Last	
	*Foreign Address	*Address 1	Address 2	Address 3			
1	SAD_SL_FORGN_ADDR1	ADDRESS3	NUM1	NUM2			
2	SAD_SL_FORGN_ADDR2	ADDRESS2					
3	SAD_SL_FORGN_ADDR3	CITY	POSTAL				

Foreign Address Setup page (2 of 2)

For outbound messages, the system uses the mapping on this page to determine from which address fields on the Personal Information page it should pick information and store it in SAD_SL_FORGN_ADDR1, SAD_SL_FORGN_ADDR2, and SAD_SL_FORGN_ADDR3 columns of the Studielink address staging table. For example, suppose you have mapped SAD_SL_FORGN_ADDR3 to *Postal* and *City* for France. The system, to generate an outbound message for a French student, retrieves the student's postal and city values, and stores the values in the SAD_SL_FORGN_ADDR3 column of the address table.

Suspend Inbound Foreign Address	The check box is <i>cleared</i> by default. If the check box is <i>selected</i>, inbound messages containing foreign address are <i>suspended</i>.
Country	Enter the country for which you want to map the address fields.
Default Address Format	You can select only one address as the default address format. For countries for which foreign address mapping is not set up on this page, all inbound and outbound addresses are processed based on that default.
Foreign Address	Select SAD_SL_FORGN_ADDR1,SAD_SL_FORGN_ADDR2, or SAD_SL_FORGN_ADDR3 to which you want map the Campus Solutions address fields.
Address 1, Address 2, and Address 3	Select the Campus Solution address fields to map to the foreign address field. For outbound processing, the system combines the Address 1, Address 2, Address 3 values (separated by tab) and inserts the combined value into the selected foreign address field. For example, if you have selected <i>CITY</i> and <i>COUNTRY</i>to map to SAD_SL_FORGN_ADDR2, the system separates the city and county values by a tab and inserts the values into the SAD_SL_FORGN_ADDR2 column of the address table. Note. Only Address1 is considered for processing <i>inbound</i> foreign address. <i>CITY</i> is a required value for those institutions that process inbound German address formats.

Setting Up Visa/Permit Values

Access the Studielink Visa/Permit Table page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Visa/Permit Table, Studielink Visa/Permit Table).

Studielink Visa/Permit Table

Visa/Permit Type: WP

Work Permit visa

Visa/Permit Data

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1900

*Effective Status:

Active

+ -

*Description:

Work Permit visa

Short Description:

Work Permi

Studielink Visa/Permit Table page

Enter visa/permit status values that are supplied by Studielink.

Mapping Visa/Permit Codes

Access the Visa/Permit Cross Reference Table page (Student Admissions, Processing Studielink NLD, Setup Studielink, Visa/Permit Cross Reference, Visa/Permit Cross Reference Table).

Visa/Permit Cross Reference Table

Details				Customize Find [Grid Icon] [List Icon]		First 1-2 of 2 Last	
*Visa/Permit CS	Description	*Visa/Permit SL	Description				
VD1	Visa for The Netherlands	DU1	visa permit1			+	-
WP1	Work Permit	00	VISA PERMIT 1			+	-

Visa/Permit Cross Reference Table page

Use this page to map a visa/permit code from Campus Solutions to a visa/permit Studielink code.

- Visa/Permit CS**

Available values are defined on the Visa/Permit Table page (Set Up HRMS, Product Related, Workforce Administration, Visas/Permits). You can select only active values.
- Visa/Permit SL (Visa/Permit Studielink)**

Available values are defined on the Studielink Visa/Permit Table page.

Setting Up Integration Broker to Communicate with Studielink

PeopleSoft Integration Broker is used to establish connectivity with the Studielink system. Once connection is established, messages are transmitted between the institution and Studielink automatically. As messages are received from Studielink, they are automatically loaded in the staging tables. When the institution generates messages to Studielink, they are automatically sent after the data has been staged. The Integration Broker, provided in PeopleTools 8.48.17 or a higher version, is required for Studielink communications.

The "Getting Started with PeopleSoft Integration Broker" section in the *PeopleTools PeopleBook: PeopleSoft Integration Broker* lists the skills of the developers who should perform PeopleSoft Integration Broker implementation.

The following table lists the service operations that have been delivered for Studielink. All the service operations listed below are for the Service *SAD_STUDIELINK* and Operation Type *Synchronous*.

Service Operation	Description	Inbound/ Outbound
SAD_SL_VCHMSG03	Studielink Message 03	Inbound
SAD_SL_VCHMSG04	Studielink Message 04	Inbound
SAD_SL_VCHMSG04_OUT	Studielink Outbound Message 04	Outbound
SAD_SL_VCHMSG05	Studielink Message 05	Inbound
SAD_SL_VCHMSG06	Studielink Message 06	Inbound
SAD_SL_VCHMSG06_OUT	Studielink Outbound Message 06	Outbound
SAD_SL_VCHMSG07	Studielink Message 07	Inbound
SAD_SL_VCHMSG08	Studielink Message 08	Inbound
SAD_SL_VCHMSG09	Studielink Message 09	Inbound
SAD_SL_VCHMSG10	Studielink Message 10	Inbound
SAD_SL_VCHMSG10	Studielink Outbound Message 10	Outbound
SAD_SL_VCHMSG19	Studielink Message 19	Inbound
SAD_SL_VCHMSG19_OUT	Studielink Outbound Message 19	Outbound
SAD_SL_VCHMSG20_OUT	Studielink Outbound Message 20	Outbound
SAD_SL_VCHMSG22_OUT	Studielink Outbound Message 22	Outbound
SAD_SL_VCHMSG25	Studielink Message 25	Inbound
SAD_SL_VCHMSG30	Studielink Message 30	Inbound

Service Operation	Description	Inbound/ Outbound
SAD_SL_VCHMSG31_OUT	Studielink Outbound Message 31	Outbound
SAD_SL_VCHMSG34_OUT	Studielink Outbound Message 34	Outbound
SAD_SL_VCHMSG35	Studielink Message 35	Inbound
SAD_SL_VCHMSG37	Studielink Message 37	Inbound
SAD_SL_VCHMSG37_OUT	Studielink Outbound Message 37	Outbound
SAD_SL_VCHMSG39	Studielink Message 39	Inbound
SAD_SL_VCHMSG47	Studielink Message 47	Inbound
SAD_SL_VCHMSG48_OUT	Studielink Message 48	Outbound

To search for the listed service operations, navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations.

For an *Inbound* service operation ensure that the:

- The Active check box is selected on the General page.
- The Handler status is active on the Handlers page.
- The Routing Definition status is active on the Routings page.

For an *Outbound* service operation ensure that the:

- The Active check box is selected on the General page.
- The Routing Definition status is active on the Routings page.

Studielink Routing Definitions

The PeopleSoft system automatically generates routing definitions for inbound messages. For outbound Studielink messages, the PeopleSoft system delivers routing definitions. Navigate to PeopleTools, Integration Broker, Integration Setup, Routings to view the delivered routing definitions.

The following lists the Routing Names for the delivered VERSION_1 Studielink routing definitions:

- SAD_SL_VCHMSG04_OUT
- SAD_SL_VCHMSG06_OUT
- SAD_SL_VCHMSG10_OUT
- SAD_SL_VCHMSG19_OUT
- SAD_SL_VCHMSG20_OUT
- SAD_SL_VCHMSG22_OUT

- SAD_SL_VCHMSG31_OUT
- SAD_SL_VCHMSG34_OUT
- SAD_SL_VCHMSG37_OUT
- SAD_SL_VCHMSG48_OUT

For Studielink, the Service Operation and Description field values are the same as Routing Name field value on the Routing Definitions page.

You should verify the Routing Connector properties on the Connector Properties page such as the PrimaryUrl against the third-party connector specifications.

See Also

PeopleTools PeopleBook: Integration Broker

Setting Up Studielink Message Equations

An optional process using the Equation Engine determines whether the system should transmit a message to Studielink. Use the Studielink Equation Setup page to assign an equation to perform the evaluation for the desired Studielink message.

Note. Some messages will not require an equation.

The PeopleSoft system delivers a set of Studielink-specific equations as part of Equation Engine. You can use the delivered equations as a starting point for designing your own equation or you can modify these equations according to your requirements. However, you cannot alter the key structure for the delivered equations without modifying the Studielink Equation Engine Process Cobol program. We recommend that you do not modify the Studielink Equation Engine Process Cobol program.

The following lists the key structure of the equations:

- Institution
- Academic Career
- Academic Program
- Emplid
- Academic Plan
- BRINcode
- Academic Year

Use equations only when manual user intervention or automatic triggering of Studielink messages are not available. Equation engine does not send a Studielink Message but selects the Transmit Message check box for the message on the Studielink Transmissions page (Student Admissions, Processing Studielink NLD, Student Transmission Status) and the Student Transmission Override page (Student Admissions, Processing Studielink NLD, Student Transmission Override).

See Chapter 27, "(NLD) Managing Studielink," Understanding Message Equations, page 893.

Access the Studielink Equation Setup page (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Equation Setup).

Studielink Equation Setup						
Academic Institution: PSNLD						
Customize Find View All First 1-4 of 4 Last						
	Studielink Message	Description	Equation Name			
1	06	Address Change	ADDSLMSG06		+	-
2	31B	Confirm Enrollment in Program	ADDSLMSG31B		+	-
3	31C	Confirm Re-enrollment	ADDSLMSG31C		+	-
4	310	Phase Change	ADDSLMSG310		+	-

Studielink Equation Setup page

Studielink Message Enter the Studielink message that the equation process should evaluate.

Equation Name Enter the equation that will perform the evaluation.

The following is an example of how an equation could work for Message 06:

1. Make a change to the student's Mailing Address status in the Campus Solutions system through a batch process you have created.
2. Run the Studielink Message Evaluation process.
3. If the mailing address has been changed, the ADDSLMSG06 equation triggers the sending of an outbound message by selecting the Address Change (06) check box on the Studielink Transmissions page to indicate that a message should be generated when the Generate Studielink Messages process is run.

These equations are pre-delivered and supported:

Equation Name	Description	Use if You Want
ADDSLMSG06	Address Change	Changes to a student's address (of Studielink address type Mailing) to trigger an outbound message.

Equation Name	Description	Use if You Want
ADDSLMSG31B	Confirm Enrollment in Program	To have the system trigger Enrollment Confirmation Message 31B automatically. To trigger the generation of this message, the student must be matriculated. Also, the student must have paid the tuition fees (effective dated row with Progr. Action Higher Education <i>PAYM</i> in the Academic Prog Higher Education page must exist). To access the Academic Prog Higher Education page, select Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD. If you want to use this equation, the prerequisite is that the Message 31B for the current academic year has not yet been sent.
ADDSLMSG31C	Confirm re-enrollment in Pgm	To have the system trigger Enrollment Confirmation Message 31C automatically. To trigger the generation of this message, student must be matriculated, re-enrolled for the relevant academic year and has paid the tuition fees (effective dated rows with Progr. Action Higher Education <i>REN</i>R and <i>PAYM</i> in the Academic Prog Higher Education page must exist). If you want to use this equation, the prerequisite is that the Message 31C for the current academic year has not yet been sent.
ADDSLMSG31O	Change of fields	Changes to the following fields to trigger an outbound message for an applicant: Academic Load, Campus or the following fields from the Application Regional page: Form of Study, Academic Level, Sub Institute which contains the Sub BRINcode. Changes to the following fields for a matriculated student: Academic Load, Campus or the following fields from the Academic Prog Higher Education page: Form of Study Higher Education, Academic Level Higher Education, and Sub Institute which contains the Sub BRINcode.

You can create other equations to trigger messages in batch using the Evaluate Equation Engine process. The following are examples of how equations could be used:

Equation Name	Description	Use if You Want
ADDSLMSG04	GBA Confirmation by the School	Changes to GBA verification status or other related GBA verification fields such as an Identification Document change to trigger an outbound message.
ADDSLMSG10	Prior Education Verification	Changes to a Student's Prior Education Verification status to trigger an outbound message.
ADDSLMSG19	19 Payment of Fees	Changes to a student's Payment Amount, Payment Institution or Payment Status to trigger an outbound message. This equation should be related to the message that contains information on fees paid by the student.

<i>Equation Name</i>	<i>Description</i>	<i>Use if You Want</i>
ADDSLMSG20	Payment of fees	Changes to a student's Payment Amount, Payment Institution or Payment Status to trigger an outbound message. This equation should be related to the message that contains information on fees to be paid by the student.
ADDSLMSG31H	Non First Year Admiss Result	Changes to a student's admission level to trigger an outbound message.
ADDSLMSG31I	Professional duties	Changes to a student's Professional Duties status to trigger an outbound message.
ADDSLMSG31J	Language Test Requirement	Changes to a student's Language Test status to trigger an outbound message.
ADDSLMSG31K	Prior Education Deficiency	Changes to a student's Prior Education Deficiency status to trigger an outbound message.
ADDSLMSG31N	Lot Drawing Result	Changes to a student's Lot Drawing Result status to trigger an outbound message.
ADDSLMSG31P	Profession Requirements	Changes to a student's Professional Requirements status to trigger an outbound message.
ADDSLMSG37	Death of Student check	Changes to a student's deceased status to trigger an outbound message.

Receiving Messages from Studielink

This section discusses how to:

- Receive Studielink messages.
- View staging table data.
- View student messages.

Pages Used to View Studielink Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Message <number>	SAD_SL_<message number>	Student Admissions, Processing Studielink NLD, Studielink Message Data	View all Studielink message data stored in the staging tables. This component contains approximately 39 separate pages. Only the pages relevant to the selected message are displayed.
Student Transaction Summary	SAD_SL_ACTION	Student Admissions, Processing Studielink NLD, Student Transaction Summary	View all inbound and outbound messages for a specific student.

Receiving Studielink Messages

Institutions must register on the Studielink website before they can receive Studielink messages. After the institution has been registered, has provided their setup information, and their internet connectivity has been established, messages are sent to the institution automatically as students begin to use the Studielink website. The Integration Broker uses the application package SAD_STUDIELINK to process the messages that Studielink sends to the institution. The package validates whether the inbound messages conform to the xml message specifications. After validating the messages, the Integration Broker automatically loads the messages into the staging tables. You can use the Integration Broker Service Operations Monitor for Synchronous Services to view the messages that fail the xml validation check. Finally, run the Post Studielink Messages process to post the messages from the staging tables into the PeopleSoft Admission and Student Record tables.

Viewing Staging Table Data

The Studielink Message Data (SAD_SL_STAGE) component allows you to view the data of every message that has been loaded into the staging tables. The search record of the component provides selection criteria fields to allow you to search for the records that you require.

Note. A unique page exists for each Studielink message number, based on the data required in each message.

Message 03 is the message sent from Studielink to the institution to communicate all of the data related to the application of a student.

Access the Message 03 page (Student Admissions, Processing Studielink NLD, Studielink Message Data, Message 03).

Message 03			
Transaction Direction:	Inbound	Sequence Number:	1
Transaction DateTime:	03/07/2009 6:43:44.000000AM	Index ID:	1111111
Message 03		Find View All First ◀ 1 of 1 ▶ Last	
Studielink Number:	01020102	Onumber:	
Ciop Number:		Student Number:	
SOFI Number:		Merged name:	Gerritsen, Henk
Student Information			
Lastname:	Gerritsen	First Name:	Henk
Name Prefix:		Pref Firstname:	Henkie
Gender:	M	Initials:	H.P.K.
Birthdate:	1973-01-01	Mobile country code:	31
Place of Birth:	7040	Mobile number:	0611913608
Birth City:	Haarlem	Countrycode:	31
Demo date type:	Birth	Phonenumber:	0206223519
Birthdate indicator:	F	E-mail Address:	Henk@Gmail.com
Nationality:	0001	Status of Residence:	00
Nationality2:	0223	Dpers Agreed:	True
Father's Birth Country:	6030	Consent Statement:	J
Mother's Birth Country:	7040	Language Preferred:	nl
Civil Status:	2	Verified status:	O
Partner name:	Berenschot	Date of Verification:	2007-01-01
Partner name prefix:	aan	Verified by Brincode:	
Ext id date typ:	Birth	Verified by Institution:	
Identity proof:		Verified by Employee:	
Identification Number:		Student ID:	
Signalcode:			
Remark:			

Message 03 page

Academic Details, Address, Foreign Address, and Enquiry Click to access additional information about the student.

Viewing Student Messages

The following table lists the Studielink messages that are transmitted between the institution and Studielink:

Message Number and Name	Description	Transmission
03 Admission Application	Communicates all data related to the application of a student.	From Studielink to Institution.

Message Number and Name	Description	Transmission
04 GBA Confirmation	Communicates that the identification of the student has been confirmed.	From Institution to Studielink. From Studielink to Institution.
05 Personal Information Update	Communicates an update of person information of the student (name, birth date, nationality, preferred language, and ID).	From Studielink to Institution
06 Address Change	Communicates an update of address information of the student.	From Studielink to Institution From Institution to Studielink
07 Prior Education Information	Communicates an update of prior education information.	From Studielink to Institution
08 Payment Information Update	Communicates the payment method updated by the student on the Studielink website.	From Studielink to Institution
10 Prior Education Verification	Verifies prior education entered by the student.	From Institution to Studielink From Studielink to Institution
19 Payment of Fees	Communicates the status of the payment of college fees.	From Institution to Studielink From Studielink to Institution
20 Cost of Fees	Communicates the payment value of the college fee to the student. The student is able to print the letter of authorization from the Studielink website after this message has been received and processed by Studielink.	Institution to Studielink
22 Message to Applicant	Communicates extra information to the student as a result of incoming messages.	From Institution to Studielink
25 Request for Re-enrollment	Communicates the re-enrollment request of the student.	From Studielink to Institution
30 Studielink ID Change	Communicates the new Studielink student ID to the institution. Indented as a response to messages 34 and 34C.	From Studielink to Institution

Message Number and Name	Description	Transmission
Student Status Changes: 31A Receipt of Application 31B Confirm Enrollment in Program 31C Confirm Re-enrollment 31D Discontinuation Not Allowed 31E Discontinuation Allowed 31G Withdrawal Confirmed 31H Non First Year Result 31I Professional Duties 31J Language Test Required 31K Prior Education Deficiency 31N Lot Drawing Result 31O Phase change 31P Profession Requirements 31Q Confirmation of enrollment 31Z Rejected Application	Communicates a status update of the application to Studielink. Note. In the PeopleSoft Campus Solutions system, this message is divided into separate messages based on the specific business case.	From Institution to Studielink
34 New Application from School	Communicates all data related to the application of a student when the student applies directly to the institution instead of using the Studielink website.	From Institution to Studielink
34C Conversion to Studielink	Used to add existing students to the Studielink system.	From Institution to Studielink
34E Enrollment message	Communicates all data related to the enrollment of a student. Used to send an enrollment for academic year.	From Institution to Studielink
35 Withdrawal/Cancellation Request	Communicates a change request from the student for an application. This is associated with a cancellation request.	From Studielink to Institution
37 Death of Student	Communicates the death of a student.	From Institution to Studielink From Studielink to Institution
47 Electronic Direct Debit	Message 47 is available only if 3.0 is selected in the Studielink Version field on the Studielink Load Parameters page. Communicates that a student has signed the online direct debit statement on the Studielink site.	From Studielink to Institution

Message Number and Name	Description	Transmission
48 Correction (End) Enroll	Message 48 is available only if 3.0 is selected in the Studielink Version field on the Studielink Load Parameters page. Communicates a correction on previous withdrawal/cancellation.	From Institution to Studielink

Posting Studielink Messages to Application Tables

This section provides an overview of the Studielink posting process and discusses how to:

- Post Studielink messages.
- Resolve messages that suspend.
- View a Studielink posting report.

Understanding the Studielink Posting Process

The role of the posting process is to review each incoming message that has been loaded into the Studielink staging tables and to move the data from the message into the PeopleSoft Campus Solutions application tables for the corresponding student. When the data is loaded into the application tables, it can be reviewed and modified based on the institution's business requirements. Each message is processed based on the particular business process it represents. Some messages are specific to the admissions process, some messages are relevant only after the student has been enrolled, and other messages are independent of the student's admission or enrollment status.

Before a message can be loaded into the application tables, the posting process must determine the load parameters that need to be applied to the message. For most messages, this involves verifying that the reported BrinCode is valid for the institution (based on finding a valid BRINcd/Institution Xref setting), and then deriving the academic institution and career from the education block fields of the message and using that information to find the matching Studielink load parameter setting. For some messages, Studielink load parameters are not required, and therefore this check is not performed. Messages will suspend if either of the two checks fail.

If the message passes the first checks, the process must next identify the student recipient of the message. In most cases, the Studielink ID number, contained in most of the messages, is used to identify the student in the database. In the case of Message 03 (application for enrollment), however, if the student cannot be identified using the Studielink ID then Search/Match is also used. For all other messages for which the Studielink ID fails to identify the student, the system suspends the record and it must be resolved manually.

After the student has been identified, the posting process then validates the information contained in the message. For most messages, this involves verifying that the information contained in the education block section of the message is valid for either the institution or the student. For Message 03, the BRINcode, CIP Code (program), sub institute number, and enrollment manner must be valid for the institution (this is set up in the Academic Program Table on the Taxonomy/Campus and Home Campus NLD pages). If invalid, the message suspends. Otherwise, the system creates an admissions application for the student. For other messages that provide the education block fields, the posting process verifies that the field values match those of the student before the message can be loaded. If any message cannot be loaded properly, the system suspends it and displays the reason so that you can decide on the corrective action necessary to process the message information.

Pages Used to Post Studielink Messages to Application Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Post Studielink Messages	SAD_SL_RUN_IN	Student Admissions, Processing Studielink NLD, Process Studielink, Post Studielink Messages	Run the process that posts inbound messages from the staging tables to the application tables.
Admissions Suspense Management	SAD_SL_SUSP_K_MGMT	Student Admissions, Processing Studielink NLD, Process Studielink, Admission Suspense Management	Resolve duplicate admission applications that did not load into the application tables.
Studielink Suspense Management	SAD_SL_SUSP_MGMT	Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Suspense Management, Suspense Management	Review messages that the posting process did not load into the application tables.
Foreign Address Suspense	SAD_SL_ADDR_INSUSP	Student Admissions , Processing Studielink NLD, Process Studielink, Studielink Suspense Management, Susp Forgn Addr	Resolve suspended foreign address data.
Studielink Posting Report	SAD_SL_POST_RUN	Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Posting Report	Identify Studielink messages that have been posted and monitor recently posted messages.

Posting Studielink Messages

Access the Post Studielink Messages page (Student Admissions, Processing Studielink NLD, Process Studielink, Post Studielink Messages).

Post Studielink Messages page

Academic Institution	Enter the institution for which you want to post the messages.
Search, Match and Post	For Message 03 records, if the Studielink ID number is not found, the Search/Match process then attempts to identify the EmplID. Once a positive match occurs, or a new EmplID is required to be created, the message then posts to the application tables. For all other messages, the EmplID is determined by matching the student's Studielink ID number. If a match is found, the system posts the message into the application tables.
Post Only	For Message 03 records, all records that have been identified or assigned to an EmplID post to the application tables. The Search/Match process is not used. For all other messages, the system attempts to match the EmplID to student's Studielink ID. If a match exists, the message posts into the application tables.
Search and Match only	This option applies to Message 03 records only. The process attempts to identify the EmplID using the Search/Match process. The transaction status is updated to <i>Partial</i>. No messages are posted to the application tables. All other message types are ignored.

The Studielink Inbound application engine process (SAD_SL_IN) moves the data from the staging tables to the application tables. The message type determines how the system processes the data.

Note. Messages 04, 05, 06, 07, 08, 10, 25, 35, 37, 39: These messages are not processed into Campus Solutions tables by the SAD_SL_IN process unless the relevant check box is selected on the Studielink Load Parameters page.

Messages 19 and 47: These messages are not processed into Campus Solutions tables by the SAD_SL_IN process unless the relevant check box is selected on the Studielink Financial Parameters page.

If the relevant check box is not selected, the message status is set to skipped. Use this method for any messages which you do not want processed into transaction data tables.

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*,(NLD) Managing Studielink, Setting Up Studielink, Setting Up Studielink Message Processing Parameters

See *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*,(NLD) Managing Studielink, Setting Up Studielink, Setting Up Studielink Financial Parameters

The following table describes how each incoming message is processed and the reasons that the message might not load and is suspended:

Message	Posting Treatment	Possible Suspend Reasons
03 Request for Admissions	Create new admissions application (Program action: APPL, Program Action Reason: SL03). Create/update Campus Community core tables and NLD core records. Checklist generation or 3C event generation.	(Load parms) Studielink Load Parameters page has not been set up BRINcode/Institution Cross-reference page has not been set up. Or Brincodes have not been set up correctly for the academic program. Address Usage page has not been set up for incoming Studielink address. Component interface (CI) error. search match Cannot determine Campus or Program because of incorrect academic structure setup. No Last Name present. No Valid Academic Plan. No Valid Academic Year. Admit Term cannot be found for Academic Year and Academic Career. Birth date is greater then system date. Suspend due to Search Match. Name Royal Prefix is invalid. Marital Status not found in setup. Invalid email address format. Emplid mismatch: Process action was Add with ID, but Studielink number already has an Emplid associated with it. Emplid mismatch: Process action was Update with ID, but Studielink number already has another Emplid associated with it. Cannot determine correct Prior Education. The message will process without Prior Education. Suspense default for all students with foreign address. Addresses need to be mapped (Foreign Address Setup page has not been setup) Duplicate admission: Suspense for admissions request to existing active Institution, Career, Program, Plan combination.

Message	Posting Treatment	Possible Suspend Reasons
04 GBA Verification	Update GBA information records. Address and bio-demographic information is also updated. Update GBA Verification status in the Student Higher Education record.	ID (Studielink number) missing. Load parms, CI error, missing address usage setup. Student with foreign address. No Last Name present. Name Royal Prefix not in valid. Marital Status not found in setup. Birth date is greater then system date. Invalid Email address format.
05 Personal Information Update	Update Campus Community core records. Update or add student nationality. Update mobile phone number and email address.	ID (Studielink number), Load parms, CI error. No Last Name present. Name Royal Prefix not in valid. Marital Status not found in setup. Birth date is greater then system date. Invalid email address format.
06 Address Update	Update core address records including mailing address.	ID (Studielink number), CI error. Missing or incorrect address usage setup. Student with foreign address.
07 Prior Education Update	Update/delete student level prior education records.	Studielink number not found. Invalid Prior Education value.
08 Payment Information	New row inserted into Maintain Applications component (Program Action: DATA, Program Reason: SL08) with updated payment information. If student is matriculated, new row inserted into Student Records Higher Education NLD component with action: DATA, with updated payment information.	ID (Studielink number), CI error. Cannot determine admission application Cannot determine correct Student Records data Effective date conflict (future dated row exists or multiple matches found) Address usage setup missing. No valid academic Plan Cannot determine correct Student Records data.
10 Verified Prior Education Information	Update student level prior education records.	ID (Studielink number): Studielink number cannot be found in the system which can be due to missing or incorrect ID.

Message	Posting Treatment	Possible Suspend Reasons
19 Payment Status	New row inserted into Maintain Applications component (Program Action: DATA, Program Reason: SL19) with updated payment information. If student is matriculated, new row inserted into Student Records Higher Education NLD component with action: DATA, with updated payment information.	ID (Studielink number) No valid academic plan Cannot determine admission application Cannot determine correct Student Records data Effective date conflict (future dated row exists or multiple matches found)
25 Re-enrollment Request	New row inserted into Academic Prog Higher Education page with Program Action RENR or NRNR (non-enrollment request) Checklist generation according to setup.	ID (Studielink number) Cannot determine academic program row No records data: No Student Record data or no data found in Student Records Higher Education Record (SSR_STD_PRG_NLD). Effective date conflict (future dated row exists or multiple matches found) CI error Address usage not setup Foreign Address present.
30 Studielink ID Change	Updates the student's Studielink ID or CIOP number. In response to Message 34, this message will contain the student EmplID under the <student number> tag.	ID (student ID number, that is EmplID, not sent) EMPLID already has a different Studielink number associated with it.

Message	Posting Treatment	Possible Suspend Reasons
35 Withdrawal Request	Applicants: insert a new row into the Maintain Applications component to cancel the application (Program Action according to the setup on Studielink Load Parameters page, Program Reason: SL35). Automatically triggered message 31G (Withdrawal Confirmed). Matriculated but no tuition fees paid (no PAYM row on Student Records Higher Education NLD component): insert a new row into the Student Records component to cancel the enrollment (Program Action according to the setup on Studielink Load Parameters page, Program Reason: SL35). Insert new row into Student Records Higher Education NLD component with correct program action and Studielink status. Automatically triggered message 31E (Discontinue allowed). Matriculated but fees paid (PAYM row on Student Records Higher Education NLD component exists): Write student information to worklist table of the Withdrawal/Cancel Requests component for manual resolution (Student Admissions, Processing Studielink NLD, Withdrawal/Cancel Requests). On receiving message 35, the system enters a cancellation request in the Withdrawal/Cancel Requests component and for manual resolution the user needs to either approve or reject the cancellation request. All others: Write student information to worklist table of the Withdrawal/Cancel Requests component for manual resolution.	ID (Studielink number) CI error (address) Load Parm: Missing setup in the Studielink Load Parameters page (admission and records withdrawal action). Foreign Address present Cannot determine admission application. Cannot determine correct Student Records data.
37 Death of Student	Update the decedent data for student.	ID (Studielink number) CI (descendant data)

Message	Posting Treatment	Possible Suspend Reasons
39 Lot Drawing Result	New row inserted into the Maintain Applications component with updated lot drawing status fields and update information in the IBG-status fields (Program Action: DATA, Program Reason: SL39) If student has matriculated, lot drawing changes are not allowed and new row is inserted into the Student Records Higher Education NLD component, updating the non-lot drawing related IBG-status fields (Program Action: DATA). Checklist item assignment (Checklist item is not assigned when using events for checklist processing).	ID (Studielink number) Cannot determine admission application Cannot determine correct Student Records data.
47 Electronic Direct Debit	Message 47 is available only if 3.0 is selected in the Studielink Version field on the Studielink Load Parameters page. New row inserted into the Maintain Applications component (Program Action: program action from set up page, Program Reason: SL47. The program reason should be set up against the program action which is chosen in setup on Student Financials Parameters page). If student has matriculated, new row is inserted into the Student Records Higher Education NLD component (Program Action HE from set up page, Program Reason: SL47. The program reason should be set up against the program action which is chosen in setup on Student Financials Parameters page).	ID (Studielink number) Cannot determine admission application Cannot determine correct Student Records data.

A Component Interface error might occur when the system uses an invalid value to process data through a component interface. Message 03 uses component interface CI_PERSONAL_DATA for inserts and updates to addresses, personal data such as birth date and birth place and names data, phone data and email addresses. The following messages also use this component interface: Message 04, Message 05, Message 06, Message 08, Message 25, Message 35, and Message 37.

All messages that are posted result in a new message action row in the Student Transaction Summary page.

Resolving Messages that Suspend

There might be circumstances in which the message received from Studielink cannot be posted to the application tables. This is likely to occur in most cases with Message 03, since it is usually the first message received by the institution and generally results in the creation of the student and application records. When a message is unable to post, the system updates the transaction status of the message. At the same time, the system writes suspense information to a separate table.

This section discusses how to:

- Determine the transaction status of a message.
- Use suspense management data.
- Resolve search errors for Message 03.
- Resolve suspend errors.
- Resolve suspended foreign address.
- Resolve suspended duplicate admission requests.

Determining the Transaction Status of a Message

The transaction status of a message is always updated as the posting program processes the message.

The transaction status values are:

<i>Value</i>	<i>Used for Inbound/Outbound Messages</i>	<i>Comment</i>
Processed	Both	All processing completed.
Suspended	Inbound	Posting process is unable to post message. Available for review in the Suspense Management page.
Unprocessed	Both	Data has been loaded into the staging tables, but no processing has begun. You can use this status when you run the posting or generate message process after fixing a suspense issue. Suppose, an inbound message 03 has a <i>Suspended</i> status because BRIN/Institution has not been set up correctly. In this case, you perform the correct BRIN/Institution setup, then set the status as <i>Unprocessed</i> in the Suspense Management page and finally run the posting process again for the message.

Value	Used for Inbound/Outbound Messages	Comment
Partially Processed	Inbound	Set when the posting process runs with the Search and Match Only option activated. The system populates the Suspense Reason, Max Match Level, and Matches fields to provide results of the student ID search. Available for review in the Suspense Management page.
Transmission Error	Outbound	Unable to transmit successfully to Studielink.
Skip Transaction	Both	Manually set by user to prevent processing the message.
Manually Resolved	Inbound	Similar to transaction skip. User took manual action to resolve. The record is no longer processed.
Test Without XML	Outbound	Set when you run the Generate Studielink Messages process with the Send XML Messages check box cleared.

To view the transaction status for all inbound messages, use the search record for the Studielink Message Data page to select and view all messages containing a fixed transaction status.

Using Suspense Management Data

The Studielink Suspense Management page displays the information stored in the suspense table and is designed to explain why the inbound message did not post and to allow you to resolve certain suspense conditions. Because the system writes all messages that suspend (or are partially processed) to a suspense table, the Studielink Suspense Management page is the primary method for reviewing inbound messages with potential problems.

Because each message can have distinct reasons for suspending, the page is designed to provide the relevant tools necessary for resolving the suspense reasons for each message.

Access the Studielink Suspense Management page (Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Suspense Management).

Suspense Management

Susp Forgn Addr

Studielink Suspense Management

Transaction Direction:Inbound

Transaction DateTime:03/07/2009 6:43:44.000000AM

Sequence Number:1

Index ID:1111111

Source ID:vchmsg03inschrijving

*Transaction Status:

Suspended

Suspense Reason:Search/Match

Search/Match returned a result of Suspend for this student.

	Studielink Message	Sequence	Message Set Number	Message Number	Message Text
1	03	1	14907	706	Search/Match result = Suspend

Studielink Number:01020102

EmplID

Ciop Number:

SOFI Number:

Onumber:

Merged name:Gerritsen, Henk

First Name:

Henk

Name Prefix:

Lastname:

Gerritsen

Birthdate:

1973-01-01

Education Block Fields

Brincode institution:	NL02 PSNLD	Enrolment Manner:	E
Academic Career:	BAC	Brincode institution:	NL02
Program Code:	04401	Academic load:	Full-time
Alt Program Code:	H00010	Academic Level:	Bachelor
Sub Institute:	01	Academic Year:	2008
City:	AMSTERDAM	Start month:	09 reg.2008
			Start Occasion

[Message Data](#)

Studielink Suspense Management page (1 of 5)

Campus:		Student ID:	
Academic Program:		Matches:	0
Post Action:		Max Match Level:	0
Partner name prefix:	aan		
E-mail Address:	Henk@Gmail.com		
Mobile number:	0611913608	31	Countrycode:
Phonenumber:	0206223519	31	Mobile country code:
Civil Status:	Married		

Studielink Suspense Management page (2 of 5)

Message Data			
Campus:		Max Match Level:	0
Academic Program:		Matches:	0
Studielink Posting Action:		Student ID:	

Studielink Suspense Management page (3 of 5)

Message Data	
Application Number:	00024237

Studielink Suspense Management page (4 of 5)

Message Data	
Academic Career:	UGRD
Student Career Nbr:	1

Studielink Suspense Management page (5 of 5)

The section of the page below the Suspense Reason information and above the Message Data link displays high-level information about the student. The system loads this information directly from the actual message. Student identification fields are displayed to assist in identifying the student in the database and can be used to resolve search match errors with message 03. For all other messages, the ID field will display the student's EmplID if the Studielink number is already in the database. The fields in the Education Block Fields group box are used to identify the data load parameters that the posting process applies for the record, and to determine the student's program of study. Use the Message Data link to access the staging table pages and view all the information contained in the message.

Depending on the type of message suspended, additional fields appear below the Message Data link. They can help resolve the suspend conditions of the message. Depending on the reason for the suspension (as with Message 03), enter the appropriate information to allow the message to be processed.

When the posting process cannot determine which admissions application of the student to update with the message data (as with Messages 08, 19, and 39) because the student has multiple application records, you must assign the correct admissions application to update.

When the posting process cannot determine which academic career of the student to update with the message data (as with Message 25) because the student has multiple active academic programs, you must assign the career and career number to update.

Campus	Assign the appropriate campus in order to process message 03. This value will be validated against the home campuses defined for the academic program by the posting process.
Academic Program	Assign the appropriate academic program for the message based on the reported Program (CIP) code. This value will be validated against the academic program by the posting process.
Studielink Posting Action	Use this field to resolve student identification issues. Indicate how the posting process should treat the message. Values are: <i>Add (A)</i>: The posting process creates a new EmplID and creates an admissions application record from the message data. The Student ID must be blank. <i>Recycle (R)</i>: The posting process processes the message using the Studielink load parms settings. This is the default setting for all suspended application messages. <i>Update Existing Student (U)</i>: The posting process posts the message data to the listed Student ID. The Student ID cannot be blank.
Max Match Level	The Search/Match process sets this number. It indicates the order number in the Studielink Search/Match Setup page where a match occurred.
Matches	The Search/Match process sets this number. It indicates the number of EmplIDs that met the same Max Match Level criteria.
Student ID	You can use this field to search for the matching student ID to update. The Search/Match process usually assigns this. This field is used in conjunction with the Studielink Posting Action field.
Application Number	Appears for suspended messages 08, 19, or 39. This field allows you to specify the Admissions application number to which the message should load.
Academic Career	Appears for suspended messages 25. This field allows you to specify which academic career the message will update when more than one active career exist for the student.

Student Career Nbr (Student Career Number) Appears with the Academic Career field. This field allows you to specify which student career number the message will update. This field must be updated with the Academic Career field.

The following table lists possible suspend messages and the appropriate resolution instructions:

<i>Suspend Message</i>	<i>Resolution</i>
Studielink Number not found (712).	The Studielink number on the message cannot be matched to a student in the database. Verify that the student exists in the database and then modify the student's Studielink number in the External System ID component if the message should be posted. Set the transaction status to <i>Skip</i> if the message should not be posted.
Search/Match returned a result of Suspend for this student (706).	The Search/Match settings used to identify the EmplID could not find a positive match for this application message. View the Max Match Level and Matches field values to confirm the accuracy of the Search/Match process. To manually search for an existing student, use the Student ID search field and the biographical information contained on the page.
BRIN/Institution setup not found (700).	BRIN code is not in Institution/BRIN Code X-ref table. Correct setup if the reported code is valid.
Studielink Load Parameters not found (701).	The Studielink load parameters are missing. Enter setup data.
The Load Parameters for Studielink processing have not been set up for this student's combination of Institution and Career (702).	The Studielink load parameters are missing for the student's institution or career. Correct setup if required.
The Studielink posting program was unable to determine the necessary values for Campus, Program, or Career for this student (703).	Verify that the program code is mapped to an academic program and is assigned an academic career. Verify that the academic program home campus setup is complete.
This student's data supplied by Studielink did not include a value for Academic Year, so we are unable to determine the correct Admit Term (704).	This message cannot be loaded.
This student's values for Institution, Career, and Academic Year do not match any row in the TERM_TBL record, so we are unable to determine the correct Admit Term (705).	Verify that the academic year in the message is defined in the Term table. If there is no academic year defined, the message cannot be loaded.
Search/Match has been run to attempt to identify the Student ID for this message, but the data has not been posted (721).	The record was processed in the search only mode. Run the posting process using different settings. For Message 03 only.
The Studielink Address Usage setup required for processing this message was not found (711).	The Studielink address usage is not complete. Correct setup.

<i>Suspend Message</i>	<i>Resolution</i>
The Studielink posting program received a status of Error from the CI_PERSONAL_DATA Component Interface (708).	The CI failed when inserting student personal information. This cannot be resolved locally. Data must be entered manually. Contact Oracle support to report problem.
The program could not identify the Admissions data row for this student (723).	There is no admissions application for the student. The message cannot be loaded.
The system found multiple rows of Admissions data that match the data in this message (714).	Use the Studielink Suspense Management page to select the appropriate PeopleSoft Recruiting and Admissions data (application number) to load the message.
The system is unable to process this message because the student has a future-dated Admissions data row (715).	The message cannot be loaded. Review the message data and add any required information manually.
The current Admissions row for this student has an effective date value greater than the transaction date for this message (716).	The message cannot be loaded. Review the message data and add any required information manually.
The student's Admissions program status is AC (717).	The message contains admissions level data, but the student has already been matriculated. No resolution. The message cannot be loaded. Review the message data and add any required information manually.
The program could not identify the Student Records data row for this student (724)	Use the Studielink Suspense Management page to select the appropriate PeopleSoft Student Records data (Academic Career, Career Number) to load the message.
The system is unable to match the data in this message with any Student Records data (718).	There is no PeopleSoft Student Records data for the student. The message can not be loaded.
The system found multiple rows of Student Records data that match the data in this message (719).	Use the Studielink Suspense Management page to select the appropriate PeopleSoft Student Records data (Academic Career, Career Number) to load the message.
The system is unable to process this message because the student has a future-dated Student Records data row (720).	The message cannot be loaded. Review the message data and add any required information manually.
The student number in this message was not found in the system (725).	Message 30 could not be processed because the Student Number field reported in the message does not match an EmplID. Request an updated message from Studielink with the correct student number.
The Student ID supplied has a Studielink number already associated with it that does not match the Studielink number in the message (722).	Resolve conflicting Studielink numbers.
Invalid Birth Date for Student (1013)	The birth date supplied by Studielink is greater than the system date, which is not allowed.

<i>Suspend Message</i>	<i>Resolution</i>
Invalid Royal Prefix (1014) or Invalid Partner Prefix (1015)	The name royal prefix value supplied by Studielink is invalid. The message has been processed and placed in the suspense table. The message suspends because the name royal prefix is invalid, that is, the incoming value does not match with any values in the Name Royal Prefix table (Set up HRMS, Foundation Tables, Personal, Royal Name Prefix). In this case, the error does not require a full suspense. Therefore, the applicant is processed into the system without the invalid name royal prefix value. Correct the name royal prefix for a particular person by accessing the Names page (Campus Community, Personal Information, Biographical Details, Names). Then set the message to manually resolved using the Transaction Status field on the Studielink Suspense Management page. Also, ensure that name royal prefix values supplied by Studielink match values in the Campus Solutions name royal prefix table.
Invalid Marital Status (1016)	The marital status values have not been set up on the Civil Status/Marital Status Cross-reference page.
Invalid Email Address (1017)	The email address supplied by Studielink does not conform to email format standards.
Name Missing (1026)	Last Name supplied by Studielink is invalid
Invalid Prior Education Value (1027)	The Prior Education (or subject) value supplied by Studielink is invalid. The message has been processed if a subject was invalid. Set the message to manually resolved and add the Prior Education subject using the Student Prior Education Information page.
Invalid Acad Plan (1118)	The supplied academic plan cannot be matched or a valid default academic plan cannot be found in the system for the program data supplied. Most common cause is that Studielink setup of alternative programs does not match the Campus Solutions setup of academic plans.
Foreign Address Found (1121)	Foreign address was found. Messages containing a foreign address need to be manually resolved.
Double Admissions Found (1123)	For this admission request, there is already an active admission or student records row which matches the academic career, academic program, academic plan, and BRINcode in the request. This will need to be manually resolved using the Admissions Suspense Management page (Student Admissions , Processing Studielink NLD, Process Studielink, Admissions Suspense Management).
Student/Applicant status does not Match Studielink Status for message (1217)	For this message a status field was used which can not be found in the Studielink set up tables. This message can occur when processing outbound message 31D.

<i>Suspend Message</i>	<i>Resolution</i>
No Setup for message 31E (1226)	Outbound message 31E is to be processed but there is no student record HE data which matches the set up program action or action reason for message 31E.
No Setup for message 31G (1227)	Outbound message 31G is to be processed but there is no admissions data which matches the set up program action or action reason for message 31G.

Use this table to determine what the corrective action is required for the suspended message. For Message 03, there is additional functionality provided on the page to resolve Search/Match errors.

Resolving Search Errors for Message 03

For Message 03, you can manually set the Studielink posting action to override the posting process. This method can be used when you want to override the Search/Match process and manually assign the EmplID (or force the creation of a new EmplID).

Resolving Suspend Errors

The Suspend Message and Resolution instructions table describes the conditions that may cause the message to suspend. View the Suspense Reason on the page to see the specific reason. Next, use the table to determine how to resolve the problem. If you determine that any message should not be loaded, update the transaction status to either skip or manually resolved, as appropriate for the situation. The posting process will then ignore these suspended records in the future.

Resolving Suspended Foreign Address

The third party application for Studielink has only three fields for storing foreign address data. The following example shows the three address fields in the suspense page that stores the incoming address data:

Suspense Management

Susp Forgn Addr

Foreign Address Suspense

Transaction Direction:

Inbound

Transaction DateTime:

04/23/2009 11:16:22.000000PM

Sequence Number:

1

Index ID:

99992

Source ID:

vchmsg03inschrijving

*Transaction Status:

Suspended

Suspense Reason:

Unable to update student data

Foreign Address Found

	Studielink Message	Sequence	Message Set Number	Message Number	Message Text
1	03	1	14907	1121	Foreign Address Found
2	03	2	14907	1121	Foreign Address Found
3	03	3	14907	1121	Foreign Address Found

Foreign Address Suspense page (1 of 3)

Studielink Number:

01070107

Scroll Area

Find

First

1-3 of 3

Last

Address Type:

Billing

Foreign addressline 1:

kerkenwaardergeest 28

Foreign addressline 2:

Brussel 12951

Foreign addressline 3:

Brussel-Noord

Foreign Address Country:

5010

Belgium

Street Name:

Apartment Number:

Address2:

Apartment Num Suffix:

City:

Postal Code:

Address Line 1

Postcodecheck:

True

Foreign Address Suspense page (2 of 3)

Address Type: Mailing		+ -	
Foreign addressline 1:	kerkerwaardergeest 28	Foreign addressline 2:	Brussel 12951
Foreign addressline 3:	Brussel-Noord	Foreign Address Country:	5010 Belgium
Street Name:		Apartment Number:	
Address2:		Apartment Num Suffix:	
City:		Postal Code:	
Address Line 1			
Postcodecheck:	True		

Address Type: Permanent		+ -	
Foreign addressline 1:	ferungestrasse 12	Foreign addressline 2:	Berlin 12951
Foreign addressline 3:	Deutschesland	Foreign Address Country:	6029 Germany
Street Name:		Apartment Number:	
Address2:		Apartment Num Suffix:	
City:		Postal Code:	
Address Line 1			
Postcodecheck:	True		

Foreign Address Suspense page (3 of 3)

If the Suspend Foreign Address check box has been selected (Student Admissions, Processing Studielink NLD, Setup Studielink, Set-up Foreign Address) then any message which contains foreign address fields will be suspended in Inbound Suspense by default.

To manually resolve the address data, move the Foreign Address Line 1, Foreign Address Line 2 and Foreign Address Line 3 field values to the Personal Information page's address fields. Set the Studielink Transaction Status to *Unprocessed* after all suspense issues have been resolved and reprocess this record by running the Post Studielink Messages process.

Resolving Suspended Duplicate Admission Requests

Students may enter up to four admissions requests for any given program of study during an academic year.

Examples of admission requests could be:

- Admission to the same program, plan, and BRINcode but different academic load.
- Admission to the same program, plan, and BRINcode but different campus location (sub BRINcode).
- Combinations of the above.

The former CBAP admissions load ensured that only one admission request for one program was supplied for an applicant. Studielink allows applicants to submit a maximum of four admission applications for the same program, plan, and BRINcode.

In order to make administrative processes easier, especially for institutions who matriculate students early in the admissions process, and do not create several student career number entries for one student program, the Campus Solutions system suspends all duplicate admission requests (same program, plan, career, institution, and BRINcode) in the Admissions Suspense Management page (Student Admissions, Processing Studielink NLD, Process Studielink, Admission Suspense Management).

The following example of the Admissions Suspense Management page shows a suspended record that has a single admission request for the same program.

Admissions Portal

Studielink Suspense Management

Transaction Direction: Inbound
Transaction DateTime: 03/08/2009 3:09:26.000000AM
Sequence Number: 1
Index ID: 1111111
Source ID: vchmsg03inschrijving
***Transaction Status:** Suspended

Suspense Reason:

Studielink Number:	01020102	Merged name:	Gerritsen, Henk
EmplID:	0061	First Name:	Henk
Ciop Number:		Name Prefix:	
SOFI Number:		Lastname:	Gerritsen
Onumber:		Birthdate:	1973-01-01

Education Block Fields

Brincode institution:	NL02 PSNLD	Enrolment Manner:	E	Reject Admission
Academic Career:	BAC	Academic load:	Full-time	Revoke Admission Rejection
Program Code:	04401	Academic Level:	Bachelor	Delete Suspended Record
Alt Program Code:	H00010	Academic Year:	2008	
Sub Institute:	05	Start month:	09 reg.2008	
City:	AMSTERDAM			Message Data

Admissions Suspense Management page with Education Block Fields (1 of 3)

Rejected Admissions				Find	First	1 of 1	Last
Transaction Direction	Outbound	Index ID	2009-03-08T03:11:33.00-0061-31Z				
Transaction DateTime	03/08/09 3:11:33.000000AM	Seq Nbr	1				
Transaction Status							
Brincode institution	NL02	Enrolment Manner	Extr				
Academic Career	Bachelor	Academic load	Full-time				
Program Code	04401	Academic Level	Bachelor				
Alt Program Code	H00010	Academic Year	2008				
Sub Institute	05	Start month	09				
City	AMSTERDAM		reg.2008				
							Message Data

Admissions Suspense Management page with Rejected Admissions Fields (2 of 3)

Current Admissions				Find	First	1 of 1	Last
BRINcode:	NL02 PSNLD	Form of Study:	Extr				
Academic Career:	Bachelor (NLD) 0	Academic Load:	Full-Time				
Academic Program:	H010 04401	Academic Level:	Bachelor				
Academic Plan:	H00010	Academic Year:	2008				
Sub Institute:	01						
Campus:	MAIN						
Effective Date:	03/07/2009 0	Prog Nbr:	0				
Application Nbr:	00024519	Status:	Applicant				
							Application Maintenance

Admissions Suspense Management page with Current Admissions Fields (3 of 3)

The *Admissions Suspense Management page with Education Block Fields* example displays the suspended record. The suspended record is Message 03, which the system has received, loaded and suspended. Click the Message data link to navigate to the Message 03 staging table display only page.

The *Admissions Suspense Management page with Current Admissions Fields* example indicates that the application already exists in the system. You can use the Application Maintenance link to navigate to the application existing in the system.

You can choose one of the following methods to resolve the issue:

- Use the Application Maintenance link to cancel the existing application. Then go back to the Admissions Suspense Management page and process the current suspended application (set transaction status to *Unprocessed* and save the suspended message). Run the Post Studielink Messages process. After running the Post Studielink Messages process, click the Delete Suspended Record button on the Admissions Suspense Management page to delete the processed suspended record.

- Click the Reject Admission button on the Admissions Suspense Management page. When you click the button, the system triggers the outbound Message 31Z, creates the Message 31Z content, and inserts the message into the staging table. You will then need to run the Generate Studielink Messages process to generate and send the Message 31Z to Studielink. If the Generate Studielink Messages process has not been run, you can cancel the rejection by clicking the Revoke Admission Rejection button on the Admissions Suspense Management page.

Reject Admission	Click to create message 31Z.
Revoke Admission Rejection	Click to delete created message 31Z. This is possible for 31Z messages that have not been sent to Studielink.
Delete Suspense Record	Click if the admission application already exists in the system.

Viewing a Studielink Posting Report

Access the Studielink Posting Report page (Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Posting Report).

Studielink Posting Report

Run Control ID: PS

Report ManagerProcess MonitorRun

Report Parameters

Academic Institution:PSUNV

Academic Career:Bachelor (NLD)

Message Code:Admission Application

Message Posting Date Range

*From Date:06/21/2006

*To Date:08/01/2006

Studielink Posting Report page

After selecting your report parameters, click the Run button to generate a report to identify Studielink messages that have been posted. You can also use the report to monitor recently posted messages.

Reviewing and Updating Studielink Information

This section discusses how to:

- Review admissions information.
- Review regional Studielink information.
- Review higher education details.
- Review external system IDs.
- Review academic progress.
- View prior education information for a student.
- Send text messages to students through Studielink.

Pages Used to Review and Update Studielink Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Program Data	ADM_APPL_PROG_ENT	Student Admissions, Application Entry, Add Application, Application Program Data	Enter Studielink admissions applications data.
Application Program Data	ADM_APPL_PROG_MNT	Student Admissions, Application Maintenance, Maintain Applications, Application Program Data	Review and update Studielink admissions applications data.
Application Regional	SAD_APPL_REG_DATA	• Student Admissions, Application Entry, Add Applications, Application Regional • Student Admissions, Application Maintenance, Maintain Applications, Application Regional	View and update country-specific admissions application information.
Regional	SCC_BIO_DEMO_REG	• Student Admissions, Application Entry, Add Application, Regional • Student Admissions, Application Maintenance, Maintain Applications, Regional	View and update country-specific admissions application information.
Administer Student Higher Education	SSR_STUDENT_NLD	Records and Enrollment, Higher Education NLD, Student Higher Education NLD	Review student level higher education information, including GBA verification.

Page Name	Definition Name	Navigation	Usage
External System ID	EXTERNAL_SYS_ID	Campus Community, Personal Information, Identification, External System ID	View the student's unique Studielink identification number.
Academic Prog Higher Education	SSR_STD_PRG_NLD	Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD	View and update the student's NLD specific information while the student is matriculating at the institution.
Studielink Education Block Information	SSR_SL_INF_SUB_NLD	Click the Details link on the Academic Prog Higher Education page.	View or update the BRINcode, Sub Institute and Program code values.
Student Prior Education Information	SCC_PRIOR_EDU_NLD	Student Admissions, Processing Studielink NLD, Student Prior Education Info	View and update the student's prior education information.
Student Messages	SAD_SL_STD_MSGS	Student Admissions, Processing Studielink NLD, Maintain Student Messages	Send messages to students through Studielink.

Reviewing Admissions Information

This section discusses how to review:

- Application program data.
- Other application information.

Reviewing Application Program Data

Access the Application Program Data page.

Warning! Academic program is a key to the Studielink student tables. Changing the student's academic program after it has been saved can cause orphan rows in the message tables.

Reviewing Other Application Information

Access the Application Regional page (Student Admissions, Application Maintenance, Maintain Applications, Application Regional).

Biographical Details	Addresses	Regional	Application Program Data	Application Regional	Application Data
Test001 Studielink1			3166		
Academic Institution: PeopleSoft University - NLD					
Academic Career: Bachelor (NLD)			Application Number: 00025047		
▼ Netherlands					
Program Data Find View All First 1 of 1 Last					
Program Number: 0		Effective Date: 06/01/2010			
Admit Term: 2100 2010		Effective Sequence: 1			
Academic Program: U001 IHH					
Program Information					
BRINcode: NL03 Diemen		Start Month: 09			
Program Code: 34411 International hotel management		Start Occasion: reg.2010			
Academic Year: 2010					
Sub Institute: 02 amsterdam					
Higher Education Additional Information					
Studielink Status: Cancelled/Withdrawn		☐ Message 310			
Admission Verification					
Deficiency Status: Not yet determined		Transmit		Last Transmit Date	
Prof Requirements Status: Not Applicable		☐ Message 31K			
Professional Duties Status: Not applicable		☐ Message 31P			
Language Test Status: Not applicable		☐ Message 31I			
Approval Higher Year:		☐ Message 31J			
		☐ Message 31H			
Student Prior Education		Student Data Higher Education		Student Comments	
				Student Messages	

Application Regional page (1 of 3)

Payment Information	
Payment Indicator:	v ☐ Message 19
Payment Amount:	☐ Message 20
Studielink Form of Payment:	Payment Transfer v
Paid by:	Other v
☒ Request Payment Terms	
Paid at Brincode:	
Paid at Institution Name:	
Barcode:	
Order Number:	Student Bank Accounts

Application Regional page (2 of 3)

Lot Drawing	
Lot Drawing Type:	Local
IBG Status:	
IBG Status Reason:	
Lot Drawing Result:	
Lot Drawing Result Reason:	
Lot Drawing Number:	
Lot Drawing Date: ☐ Message 31N	
Additional Information	
Form of Study:	Extraneus
Academic Level:	Bachelor
☒ Funding Applies	

Application Regional page (3 of 3)

Higher Education Additional Information and Admission Verification

These group boxes display Studielink application information. When you review the application, you can change the values of the fields in accordance with the institution's business process. If your institution wants to communicate the status changes to Studielink, select the Transmit check box. When you run the Generate Studielink Messages process, the process will select the messages for which you selected the Transmit check boxes and generate the XML data for Studielink communication.

Studielink Status

Select the student's status within Studielink. Values are:

Continuing Application
Cancelled/Withdrawn
Registered/Enrolled
No Re-enrollment
Rejected/Denied
Study Suspended
Departed
Enrollment Requested
Not a Studielink participant

Deficiency Status

Select the student's prior education sufficiency status. Values are:

Deficient via institution
Deficient via IBG Counter
Not Deficient via IBG Counter
Not yet determined
Provisional IBG
Provisional Institution
Sufficient

Prof Requirements Status (professional requirements status)	Select the student's professional requirements status. Values are: <i>Not Applicable</i> <i>Open, not yet determined</i> <i>Rejected</i> <i>Selected/Passed</i>
Professional Duties Status	Select the student's professional duties requirement status. Values are: <i>Not Applicable</i> <i>Open, not yet determined</i> <i>Rejected</i> <i>Selected/Passed</i>
Language Test Status	Select the student's Dutch language requirement. Values are: <i>Not Applicable</i> <i>Open, not yet determined</i> <i>Rejected</i> <i>Selected/Passed</i> <i>Passed</i>
Approval Higher Year	Indicate whether the student who requested to be enrolled as a non-first year student is accepted or rejected by your institution. The Academic Level field indicates whether the admission request is for First Year or non First year.
Student Prior Education	Click this link to access the Student Prior Education Information page.
Student Data Higher Education	Click this link to access the Administer Student Higher Education page.
Comments	Click this link to access the Student Comments page, which displays the comments collected by Studielink and sent with the student's application. The link does not appear if no comments exist for the student.
<i>Payment Information</i>	
Payment Indicator	Indicates whether the student's fees have been paid for the enrollment period. Values are <i>Paid</i> and <i>Not Paid</i> .
Payment Amount	The amount paid by the student.
Studielink Form of Payment	The source of the payment.
Paid By	The method of payment of the student's fees. Values include <i>Parents</i> and <i>Another institution</i> .

Request Payment Terms	Indicates if the student requested payment to be scheduled in multiple payments.
Paid at BRINcode	The Brincode of the institution that received the student's payment for the year.
Paid At Institution Name	The institution that received the student's payment for the year (relevant in case of inbound message 19).
Barcode	The barcode of the institution that can be sent to Studielink for payment forms.
Order Number	Unique Order Number that you can send to Studielink for use on payment forms.
Student Bank Accounts	Click this link to access the Student Bank Accounts NLD page where you can review the bank account details.
<i>Lot Drawing</i>	
Lot Drawing Type	Indicates whether the student participates in a lot drawing for their program. Values are: <i>Central</i> , <i>Local</i> , and <i>None</i> .
IBG Status	In central lot drawings, this is the lot drawing result determined by IBG. Values include: <i>Sent</i> and <i>Processed</i> .
Lot Drawing Date	The date that the lot drawing occurred.
IBG Status Reason	The reason for the lot drawing status given by IBG. Values include: <i>Transcript too late</i> and <i>Applied after close date</i> .
Lot Drawing Result	Indicates the result of the lot drawing process. Values include: <i>Locally Drawn</i> and <i>Conditionally Selected</i> .
Lot Drawing Result Reason	Values include: <i>Hardship Clause</i> and <i>Language Test</i> .
Lot Drawing Number	Priority number assigned by the school for decentral lot drawing candidates.

Reviewing Regional Studielink Information

Access the Regional page (Student Admissions, Application Maintenance, Maintain Applications, Regional).

GBA Nationality		Find View All	First	1 of 2	Last
*GBA Nationality Code:	0001 Dutch				
Start Date:	12/17/2008	Status:	Active		

Correspondence Number		Find View All	First	1 of 1	Last
*Effective Date:	12/17/2008	Correspond Nbr:			

Studieliink Number		Find View All	First	1 of 1	Last
Effective Date:	12/17/2008	Studieliink Nbr:	01070107		

Prior Education		Find View All	First	1 of 1	Last
*Prior Education:	00053 HAVO N+T	End Date:	07/03/2000		
Program Status	Completed	☐ Highest form of Education			
External Org ID:					
Ext Org Location	0				

Subject data		Customize Find View All	First	1-3 of 3	Last
	Subject Area	Description	External GPA		
1	0001	NLD - Math	10.000		
2	0002	NLD - Calculus	10.000		
3	0003	NLD - Computer Science	10.000		

Regional page (1 of 2)

Student Information		Find View All	First	1 of 1	Last
Effective Date:	01/11/2006	Status:		Mandatory Type:	
				☐ Exempt	

Scholarship information		Find View All	First	1 of 1	Last
Effective Date	01/11/2006	Status		☐ Right to Scholarship	

USA

Regional page (2 of 2)

Studieliink Number

The External System ID page populates the Studieliink Nbr (Studieliink Number) field.

Reviewing Higher Education Details

Access the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD).

Administer Student Higher Education

Test001 Studielink13166

Student details

Find | View AllFirst1 of 1Last

First Year Higher Education:2010

Consent Statement:J

First Year Financial Aid:

Regime:

GBA Verification via BRON

GBA Status:

Unknown Birthdate:☒

GBA Year of Birth:

GBA Month of Birth:

GBA Verification via Studielink

ID Verification StatusLocally (institution) verified

Registration Termination Date:08/13/1967

ID Verification Date:01/01/2010

☒ Consent statement from IBG

IBG Supplied Verification:

Reason Code:

Identification Document:Passport

Identification Number:-

ID Verified by Brincode:NL03Diemen

ID Verified by User:SSR_NLD

ID Verification Remark:String

Administer Student Higher Education page (1 of 2)

Student BRINcode

Find | View AllFirst1 of 1Last

*BRINcode:NL03Diemen

First Year at Brincode:2010

First Year Funded:2010

Progress academic year

Find | View AllFirst1 of 1Last

*Academic Year:

Individual Norm Units:

Total Number of Units:

☐ Study Progress

Administer Student Higher Education page (2 of 2)

Consent Statement

Indicate whether the student has given consent for the institution to release information to Studielink and IBG.

Values are:

Yes (consent granted)

No

Unknown

GBA Verification via BRON

If you select the Unknown Birthdate check box, the GBA Year of Birth and GBA Month of Birth fields become available. You must enter a value for year of birth.

GBA Verification via Studielink

The GBA Verification via Studielink information is used to report the verification of the student's identification.

Reviewing External System IDs

Access the External System ID page (Campus Community, Personal Information, Identification, External System ID).

External System ID

Susan Jones 0002

External System Find | View All First 1 of 1 Last

*External System: Studielink

External System Details

*Effective Date	*External System ID
01/02/2006	925185100

External System ID page

The student's unique Studielink identification number is stored as an external system ID. This is updated when posting messages 03 and 30 (if a Studielink ID change is reported), and is provided when sending messages to Studielink.

Note. This value should not be confused with the ANZ StudyLink external system value.

Reviewing Academic Progress

Access the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD).

Academic Prog Higher Education

Henkie Gerritsen

0061

Academic Career:

Bachelor (NLD)

Student Career Nbr:

0

Program Short Descr:

BussEcon

Career Req. Term

Acad year 2008-2009

Higher Education Information

Find | View All | First 1 of 2 Last

Progr Status Higher Education:

Enrollment

Action Date:

03/08/2009

*Effective Date:

03/08/2009

Effective Sequence:

1

*Progr Action Higher Education:

MATR

Matriculation

Detail

Student Messages

Studielink Status:

I

Registered/Enrolled

Form of Study Higher Education

Extraneus

Acad Level Higher Education:

Bachelor

☒ Funding Applies

☐ Program Units Apply

☐ Message 31O

*Academic Year:

2008

☐ Message 31K

Deficiency Status

Not yet determined

☐ Message 31P

Prof Requirements Status

Not Applicable

☐ Message 31I

Professional Duties Status

Not applicable

☐ Message 31J

Language Test Status

Not applicable

☐ Message 31H

Approval Higher Year

False

Academic Prog Higher Education page (1 of 2)

Form of Payment	
Form of Payment:	Bank
Authorized for Payment:	
Studielink Payment Information	
Payment Indicator	Paid
Payment Amount	4500,55
Studielink Form of Payment:	Payment Transfer
Paid by:	Student
Paid at Brincode	NL02
Paid at Institution Name	
Barcode	4455778889999
Ordernumber	5454545454545454545454545454
	☐ Message 19 ☐ Message 20 ☒ Request Payment Terms
	Student Bank Accounts

Academic Prog Higher Education page (2 of 2)

Studielink Status	Displays the student's current reported status.
Comments	Click to view comments from Message 25. The link appears only if comments exist.
Student Messages	Click to access the Student Messages page, where you can send messages to the student via Studielink.
Detail	Click to access Studielink Education Block Information page. Use the Studielink Education Block Information page to view or update the BRINcode, Sub Institute and Program code values.

The Studielink Payment Information group box appears if the value in the Progr Action Higher Education field is *RENr* (to display any payment information reported in Message 25) or *DATA* (to allow entry of payment information).

For information about this group box, refer to the documentation about the Application Regional page in the Reviewing Admissions Information section of this chapter.

Viewing Studielink Education Block Information

Access the Studielink Education Block Information page (click the Detail link on the Academic Prog Higher Education page).

Studielink Education Block Information

BRINcode:

NL02

NLD Brincode 02

☐ Override

Sub Institute:

01

Main

Start Month:

11

Program Code:

53.01

High School/Secondary Diploma

Start Occasion:

reg.2004

Studielink Education Block Information page

Viewing Prior Education Information for a Student

Access the Student Prior Education Information page (Student Admissions, Processing Studielink NLD, Student Prior Education Info).

Student Prior Education Information

Test001 Studielink1 3166

Prior Education
Find | View All First 1 of 3 Last

***Prior Education:** HAVO N+T

Program Status:

External Org ID: Brighton High School

BRINcode:

SubOrganization: 1 School Office

Prior Ed Extension Number:

Prior Ed Extension Desc:

Prior Ed Extension Country: Netherlands

Prior Ed Verified Status:

Prior Ed Verification Date:

Prior Ed Verified by Brincode:

Prior Ed Verified by User:

End Date:

☐ Highest form of Education

☒ Diploma

Verification Accepted:

Signal Code Customize | Find | First 1-4 of 4 Last

QCL	Signal Code
1	
2	401
3	402
4	403

Subject data Customize | Find | View All | First 1-3 of 6 Last

External Subject Area	Description	External GPA	Subject Verification Status	Verified by Brincode	External Letter Grade		
ACCT	Accounting	8.000	Not verify		G		
COMP	Computer Science	8.000	Not verify		G		
FREN	French	8.000	Not verify		G		

Student Prior Education Information page

A student can enter prior education information during the request for admission or at a later time as a separate option within Studielink. Institutions can also update a student's prior education information and then send the updated information to Studielink.

Prior Education

- Prior Education** These values are defined in the Prior Education Table NLD component.
- Highest form of Education** Select if this is the highest degree attempted or earned by the student.
- External Org ID** Define External Org IDs on the External Organization Codes page.

SubOrganization	Enter the external organization ID's sub organization code.
Prior Ed Verified Status	Values include: <i>Verified, diploma unverified, Not verified, no consent given, and Decentralized diploma.</i>
Prior Ed Verification Date	Enter the date that the prior education information was verified.
Prior Ed Verified by BRINcode	Enter the BRINcode of the institution that verified the prior education information.
Pior Ed Extension Number and Pior Ed Extension Desc	Display the values supplied by Studielink for unknown or foreign prior education schools.

Signal Code

This grid displays any signals received from Studielink concerning this Prior Education Program. Refer to the Studielink documentation from SURF foundation to view a description of the types of signal codes that can be received.

Subject data

Enter the subject area and student's GPA and grade for the subject.

Sending Text Messages to Students Through Studielink

Messages for students can be sent to Studielink so that they appear when the student logs into the Studielink website.

Access the Student Messages page (Student Admissions, Processing Studielink NLD, Maintain Student Messages).

Student Messages	
ID:	0041
Academic Institution:	PSNLD
Academic Career:	Vocational Coaching (NLD)
Academic Program:	R001
Message Detail Find View All First ◀ 1 of 1 ▶ Last	
Message Sequence:	1 Message Datetime: 07/23/06 1:33PM
Message Status:	Ready + -
Message Header:	When you completed your first degree?
Message Text:	Our records show you have not completed your first degree. Please provide an explanation.

Student Messages page

Set the Message Status to *Ready* to automatically send Message 22 the next time that messages are generated.

Once the message is generated, the system changes its status to *Sent* and the message cannot be altered.

Managing Outbound Messages

This section provides an overview of generating messages and message equations and discusses how to:

- Review pending outbound messages.
- Override outbound message transmissions.
- Determine outbound messages.
- Send outbound messages to Studielink.
- Resolve suspended outbound messages.
- Resolve outbound issues.

Understanding How Messages to Studielink Are Generated

After a student becomes part of the Studielink system (either by receiving an admission application or by the institution registering its current enrolled students), changes to the student's information must be reported to Studielink. In some cases, students initiate changes (for example, changes to personal information and requests for re-enrollment) by logging on to the Studielink website. In other cases, institutions report changes to Studielink in the form of specific electronic transactions. This section discusses messages that must be sent from the institution to Studielink.

The messages that can be sent to Studielink fall into several categories: those that can only be sent as part of the admissions application process, those that can only be sent after the student has been matriculated and enrolled, and those that are not dependent on either condition.

You can initiate messages to Studielink in several ways. For an applicant, when you determine that information should be sent to Studielink, you can indicate the messages to be sent by manually setting the Transmit check box on the Application Regional page for the information to be sent directly from the admissions maintenance component.

For a student, when you determine that information should be sent to Studielink, you can indicate the messages to be sent by manually selecting the Transmit check box on the Academic Prog Higher Education page for the information to be sent directly from this component (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD).

You can also use the Student Transmission Override page to set the transmit status for the appropriate messages that you want to send. If you select the appropriate transmission check box, the system will generate a message and send it to Studielink when the Generate Studielink Message process is run. When using the override page, you are responsible for ensuring that the data to be transmitted for each message has been correctly set in the source data pages.

Alternatively, you can use the Studielink Message Evaluation process to automatically determine if a message should be sent. This process uses the Equation Engine to allow you to define the conditions for determining whether to send a particular message. This process determines whether a particular message should be transmitted; if it should, the system selects the appropriate transmission override check box – the same check boxes that you can set manually. The process is not designed to cancel messages marked to be sent – it *cannot clear* any of the transmission check boxes. When the Generate Studielink Message process runs, these messages are then generated and transmitted.

It is expected that institutions will use a combination of methods to initiate the transmission of messages to Studielink. Institutions should develop the business processes that they will use to meet the conditions of the messages that they want to transmit. This analysis should indicate whether a message will be initiated manually, by equation process, or both.

Once messages have been updated to send, you can run the Generate Studielink Message process. This process populates the necessary message data into the staging tables, creates the physical messages, and then transmits them to Studielink. Once a message has been successfully generated, the process updates the transmit status check boxes to a blank value and the record of the transaction appears in the Student Transaction Summary page.

The following table describes the expected user actions that would trigger the transmission of the Studielink message:

<i>Message to Studielink</i>	<i>When message is required / How data is provided</i>	<i>How message is triggered</i>
Receipt of Application (31A)*	When the student's application for enrollment is loaded into the system.	This message is automatically queued to transmit by the posting of Message 03. For the message to be sent by the Generate Studielink Message process, the Receipt of Application (31A) check box must be selected on the Studielink Send Parameters page.

Message to Studielink	When message is required / How data is provided	How message is triggered
Rejection of Admissions Request (31Z)	When admission request message 03 is rejected.	If admission request is received for which an active admission record with the same institution, BRINcode, academic year, and academic plan already exists, then you can reject the message 03 by clicking the Reject Admission button on the Admissions Suspense Management page. The system then creates Message 31Z with Studielink Status R.
Receipt of re-enrollment request (31Q)	When the system processes the inbound message 25 successfully.	This message is automatically queued to transmit with status V by the posting of Message 25. For the message to be sent by the Generate Studielink Message process, the Confirmation Receipt (31Q) check box must be selected on the Studielink Send Parameters page.
GBA Verification (04)	If the student's identification has been verified by the institution.	Prerequisite for automatic and manual trigger of the message: The GBA Verification (04) check box <i>and</i> at least one appropriate trigger status value must be selected on the Studielink Send Parameters page. Manually on the Studielink Transmission Override page or by Studielink Message Evaluation process. You can create an equation. The naming convention for the equation is ADDSLMSG04. The equation must verify whether the GBA verification (04) check box has been selected on setup. Also as a criteria the equation should verify that the status of the GBA Verification field on the Student Higher education page matches that of the setup. For applicants or students, this message is automatically queued to transmit when you select a field value in the ID Verification Status field of the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD), which matches the setup field value. Student must be a Studielink participant.

Message to Studielink	When message is required / How data is provided	How message is triggered
Address Change (06)	The student's address is changed so that the effective date of the address no longer matches that of the last address that information was sent to, or received from Studielink.	Prerequisite for manual trigger of the message: The Address Change (06) check box must be selected on the Studielink Send Parameters page. Manually on the Studielink Transmission Override page or by Studielink Message Evaluation process. Equation Engine supplied ADDSLMSG06. You can change the equation criteria. The equation must verify whether the Address Change (06) check box has been selected on setup. Also as a criteria the equation should take into account any setup which relates to outbound address usage.
Prior Education Verification (10)	When the institution verifies any of the student's prior education records.	Prerequisite for automatic and manual trigger of the message: The Prior Education (10) check box <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. Manually on the Studielink Transmission Override page or by Studielink Message Evaluation process. You can create an equation. The naming convention for the equation is ADDSLMSG10. The equation must verify whether the Prior Education (10) check box has been selected on setup. Also as a criteria, the equation should verify that the status of the Prior Education Verification field on the Student Prior Education Information page (Student Admissions, Processing Studielink, Student Prior Education Info) matches that of the setup. For applicants or students, this message is automatically queued to transmit when the diploma program status is <i>completed</i> and you select a field value in the Prior Ed Verified Status field of the Student Prior Education Information page (Student Admissions, Processing Studielink NLD, Student Prior Education Info) which matches the field value from setup.

Message to Studielink	When message is required / How data is provided	How message is triggered
Payment Confirmation (19)	When the student has paid fees for the enrollment year. On the Maintain Applications component, a new program data row is inserted and the Payment Indicator field is set to <i>Paid</i> and the Payment Amount field is not zero. Studielink Version 3.0 only: Amount in student finance table ITEM_SF is checked against the account balance and the amount is entered in the Payment Amount field.	Prerequisite for automatic and manual trigger of the message: The Payment of Fees (19) check box must be selected on the Studielink Financial Parameters page. Manually by the user on the Application Regional page, Studielink Transmission Override page, or by Studielink Message Evaluation process. You can create an equation. The naming convention for the equation is ADDSLMSG19. The equation must verify whether the Payment of Fees (19) check box has been selected on setup. Also apply business logic as appropriate to trigger based on data in the Studielink tables or Student Financials tables. For applicants or students, this message is automatically queued to transmit when you set the Paid By field value to a non empty value or <i>Another Institution</i> on the Application Regional page or Academic Prog Higher Education page. Studielink Version 3.0 only: Message 19 is triggered automatically if the Send Msg 19 Automatically check box is selected on the Studielink Financial Parameters page. This check box is available only if the Electronic Direct Debit (47) check box is selected. Inbound message 47 then automatically triggers message 19 outbound. (Message 47 is sent from Studielink to Campus Solutions if the student signs the online direct debit statement on the Studielink site.)

Message to Studielink	When message is required / How data is provided	How message is triggered
Payment Amount (20)	On the Maintain Applications component, a new program data row is inserted and the Payment Indicator field is set to <i>Not Paid</i> and the Payment Amount field is not zero. Studielink Version 3.0 only: Amount in student finance table ITEM_SF is checked against the account balance and the amount is entered in the Payment Amount field.	Prerequisite for automatic and manual trigger of the message: The Cost of Fees (20) check box must be selected on the Studielink Financial Parameters page. Manually by the user on the Application Regional page, Studielink Transmission Override page, or by Studielink Message Evaluation process. You can create an equation. The naming convention for the equation is ADDSLMSG20. When creating the equation, take into account prerequisite business logic. For applicants or students, this message is automatically queued to transmit when you set the Payment Indicator field value to <i>Not Paid</i> on the Application Regional page or Academic Prog Higher Education page.
Message to Student (22)*	Institution wants to send a text message to the student via Studielink. Enter messages on the Student Messages page.	This message is queued automatically when the Message Status field is set to <i>Ready</i>.
Confirm enrollment in program (31B) (newly matriculated)	Institution admits the student into their program of study. On the Maintain Applications component, a new program data row is inserted with a program action that matches the program action in the Trigger 31B field. Example: User enters PAYM in the Progr Action Higher Education field of the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). The academic year is same as the First year in higher education NLD. PAYM has been selected as value in field Trigger 31B. The Message is triggered. The outbound process (SAD_SL_OUT) selects data to be included in the messages based on the Select 31B field value.	Automatically if the Confirm Enrollment (31B) check box is selected on the Studielink Send Parameters page and the program action that is selected in the Trigger 31B field on that page matches the updated program action on the Application Program Data page or the Academic Prog Higher Education page. Manually by the user on the Studielink Transmission Override page or by Studielink Message Evaluation process (Equation provided: ADDSLMSG31B). You can change the equation. When changing the equation, take into account prerequisite business logic.

Message to Studielink	When message is required / How data is provided	How message is triggered
Confirm re-enrollment in program (31C)	Institution receives Message 25 requesting re-enrollment. The institution responds with Message 31C. Example: The user enters the <i>REN</i>R row on the Academic Prog Higher Education page for the new academic year. Once the payment information is received, the user enters the <i>PAY</i>M row on the Academic Prog Higher Education page for the new academic year. The field value for the Select 31C field on setup page equals PAYM.	Automatically if the Confirm Re-enrollment (31C) check box is selected on the Studielink Send Parameters page and the program action that is selected in the Trigger 31C field on that page matches the updated program action on the Academic Prog Higher Education page. Manually by the user on the Studielink Transmission Override page or by Studielink Message Evaluation process (Equation provided: ADDSLMSG31C). You can change the equation. The naming convention is ADDSLMSG31C. When changing the equation, take into account prerequisite business logic.
31D. Confirm discontinuation not allowed*	Institution receives Message 35 requesting a Stop Study. The user must determine if the discontinuation is allowed. If not, the user updates the Studielink Cancellation Requests page. For applicants, the user must ensure that the applicant status on Application Regional page does not have any of the following values: • <i>Registered/enrolled</i> • <i>Enrollment requested</i> • <i>Continuing application</i> For students, the user must ensure that on the Academic Prog Higher Education page, the Program Action Higher Education is <i>DSNA: departure not allowed</i> and the Studielink status is <i>Registered/Enrolled</i>.	Prerequisite for manual trigger of the message on the Transmission Override page: The Discontinue Not Allowed (31D) check box must be selected on the Studielink Send Parameters page. Updating the status of the withdrawal request on the Studielink Cancellation Requests page will queue this message to be transmitted. This can be done even if the Discontinue Not Allowed (31D) check box is not selected on Send Parameters Page. Manually by the user on the Studielink Cancellation Requests page by setting the Process Status to <i>Complete</i> and Request Status to <i>Not Allowed</i>. If institution has not received message 35, users can initialize this message by selecting the 31D check box on the Studielink Transmission Override page. You must ensure that the described prerequisites are met.

Message to Studielink	When message is required / How data is provided	How message is triggered
31E. Confirm discontinuation*	Institution receives Message 35 requesting a Stop Study. The user must determine if the discontinuation is allowed. If allowed, the student's academic program must be updated to reflect the discontinuation. If no payment has been received from student and no future dated row (in reference to received end date) or payment row or cancellation row has been found in Academic Prog Higher Education page then the system automatically initializes Message 31E for sending. A row is inserted into the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD) with effective date end date from Studielink.	Automatically if the Discontinuation Allowed (31E) check box is selected on the Studielink Send Parameters page and the updated program status on the Student Program page matches a value in the Records Withdrawal Action field on the Student Records Program Action & Studielink Status Mapping page. Updating the status of the withdrawal request on the Studielink Cancellation Requests page will queue this message to be transmitted automatically. Manually, by updating the Studielink Transmission Override page—the Discontinuation Allowed (31E) check box must be selected on the Studielink Send Parameters page.
31G. Receive confirmation of withdrawal (before admission)*	Cancellation of the student admission application prior to matriculation.	Automatically if the Withdrawal Confirmed (31G) check box is selected on the Studielink Send Parameters page and the updated program action on the Application Program Data page matches the value in the Admission Withdrawal Action field on the Admissions Program Action & Studielink Status Mapping page. For applicants not admitted, this is determined automatically when the posting process evaluates Message 35. Manually, by updating the Studielink Transmission Override page—the Withdrawal Confirmed (31G) check box must be selected on the Studielink Send Parameters page.

Message to Studielink	When message is required / How data is provided	How message is triggered
31H. Receive Result for Non-First Year	When students request a non-first year academic level, a message must be sent to verify the level.	The Non First Year (31H) check box must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31H check box on the Application Regional page, Studielink Transmission Override page, or for students by manually selecting the 31H check box on the Academic Prog Higher Education page or by Studielink Message Evaluation process. You can create an equation. The naming convention is ADDSLMSG31H. When creating the equation, take into account prerequisite business logic. For applications, automatically, when the Academic Level field on the Application Data page is not equal to value 1st Year and the field Approval Higher Year on the Application Regional page is set to value True.
31I. Receive result admissible but conditional – Professional Duties	Example: A new admissions application program data row is entered on the Maintain Applications component where the Studielink Status field is set to <i>Enrollment Requested</i> and the Professional Duties Status is set to <i>Selected/Passed</i> or <i>Rejected</i>. The Professional Duties field value matches the field value from the Send Parameters page setup.	The Professional Duties (31I) check box <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31I check box on the Application Regional page, Studielink Transmission Override page, or for students by manually selecting the 31I check box on the Academic Prog Higher Education Page, or by Studielink Message Evaluation process. You can create an equation. The naming convention is ADDSLMSG31I. When creating the equation, take into account prerequisite business logic.

Message to Studielink	When message is required / How data is provided	How message is triggered
31J. Receive signal to perform language test	Example: A new admissions application program data row is entered on the Maintain Applications component where the Studielink Status field is set to <i>Enrollment Requested</i> and the Language Test Status is set to <i>Selected/Passed</i> or <i>Rejected</i>. The Language Test value is the same as the value set up on the Send Parameters page.	The Language Test (31J) check box <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31J check box on the Application Regional page, Studielink Transmission Override page, or for students, by manually selecting the 31J check box the Academic Prog Higher Education page or by Studielink Message Evaluation process. You can create an equation. The naming convention is ADDSLMSG31J. When creating the equation, take into account prerequisite business logic.
31K. Student's prior education is deficient or sufficient	Example: A new admissions application program data row is entered on the Maintain Applications component where the Studielink Status field is set to <i>Enrollment Requested</i> and the Deficiency Status is set to <i>Sufficient</i> or <i>Deficient via Institution</i>. The Prior Ed Deficiency value is the same as the value set up on the Send Parameters page.	The Prior Ed Deficiency (31K) check box <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31K check box on the Application Regional page, Studielink Transmission Override page, or for students by manually selecting the 31K check box on the Academic Prog Higher Education page or by Studielink Message Evaluation process. You can create an equation. The naming convention is ADDSLMSG31K. When creating the equation, take into account prerequisite business logic.

Message to Studielink	When message is required / How data is provided	How message is triggered
31N. Send result of de-central selection lot drawing	Example: The student's application is for a program that requires de-central lot drawing. On the Maintain Applications component, a new row is inserted. The Lot Drawing Result is set to <i>Locally Selected</i>, or <i>Locally Not Selected</i>. If the value is <i>Locally Selected</i>, the Lot Drawing Number field must have an assigned value. The Lot Drawing Result value is the same as the value set up on the Send Parameters page.	The Lot Drawing Result (31N) <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31N check box on the Application Regional page, Studielink Transmission Override page, or by Studielink Message Evaluation process. You can create an equation. The naming convention is ADDSLMSG31N. When creating the equation, take into account prerequisite business logic. This message cannot be triggered for matriculated students.
31O Change of Phase (Academic Level – Bachelor, Propedeuse, Master)	The student phase (B, D, or M) changes from the information that is held by Studielink The student Campus and/or Subbrincode has changed. The Start Month has changed. The Academic Level has changed.	The Phase Change (31O) check box must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31O check box on the Application Regional page, Studielink Transmission Override page, or for students, by manually selecting the 31O check box on the Academic Prog Higher Education page or by Studielink Message Evaluation process. Equation Engine supplied: ADDSLMSG31O. You can change the equation engine criteria. When changing the equation, take into account prerequisite business logic.

Message to Studielink	When message is required / How data is provided	How message is triggered
31P. Professional/job Requirements	Example: A new admissions application program data row is entered on the Maintain Applications component where the Studielink Status field is set to <i>Enrollment Requested</i> and the Professional Requirements Status is set to <i>Selected/Passed</i> or <i>Rejected</i>. The Professional Requirements value is the same as the value set up on the Send Parameters page.	The Profession Requirements (31P) check box <i>and</i> at least one trigger status value must be selected on the Studielink Send Parameters page. For applicants, by manually selecting the 31P check box on the Application Regional page, Studielink Transmission Override page, or for students, by manually selecting the 31P check box on the Academic Prog Higher Education page, or by Studielink Message Evaluation process. Automatically, for applications or students, when the Profession Requirements field value on the Application Regional page or Academic Prog Higher Education Page is set to a value which is not equal to the value on the previous row (effective date or effective sequence) and the field value for Professional Requirements is the same as the value from the Send Parameters page setup.
Send Application from Institution (34)*	A new admissions application is entered on the Application Entry page where the Studielink Status field is set to <i>Enrollment Requested</i> .	This message is automatically queued to transmit on saving a new admission application and setting the Studielink status to <i>Enrollment Requested</i> .
Death of Student (37)	The decedent data page is updated with the student's date of death.	The Death of Student (37) check box must be selected on the Studielink Send Parameters page. Manually by the user on the Studielink Transmission Override page or by Studielink Message Evaluation process. You can create an equation. The naming convention is: ADDSLMSG37. When creating the equation, take into account prerequisite business logic.

Message to Studielink	When message is required / How data is provided	How message is triggered
Correction (End) Enroll (48)	Only available with Studielink version 3.0 A new Application Program Data row is entered in Admissions Maintain Applications or a new Program/Plan row is entered in Student Records Student Program/Plan.	Automatically if the Correction (End) Enroll (48) check box is selected on the Studielink Send Parameters page and the updated program action/reason matches the program action/reason on the Msg 48 Admission Correction page or Msg 48 Student Records Correction page. Manually by the user on the Studielink Transmission Override page. You can create an equation. The naming convention is ADDSLMSG48. When creating the equation, take into account prerequisite business logic.

* Automatically generated.

Understanding Message Equations

Instead of manually setting messages to be generated and sent to Studielink, you can use the functionality of the Studielink Message Evaluation process to automatically perform this action. This process utilizes PeopleSoft Equation Engine to allow you to define your business rules to initiate a message to be sent to Studielink.

The design of the equation process allows a separate equation to be assigned for any message type. The equation should be written to evaluate whether a student meets the criteria of the message and return a Pass/No Pass result. When the equation is executed, any equation that passes causes the appropriate check box in the Studielink Transmissions page to be selected. Equations can only be used to identify messages to be sent. They cannot be used to cancel the sending of a message already queued.

The PeopleSoft system provides the basic equations for some messages. You can customize the delivered equations to meet the needs and business processes of your institution or create new equations.

Note. To create custom equations, instead of modifying the existing equation, you should copy the equation using a new equation name and then modify the new equation. This preserves your equations from upgrades.

See Also

[Chapter 27, "\(NLD\) Managing Studielink," Setting Up Studielink Message Equations, page 837](#)

PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook, "Working with Equation Engine," Reviewing Delivered Equations

Pages Used to Manage Outbound Messages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Studielink Transmissions	SAD_SL_TRANSMT_INQ	Student Admissions, Processing Studielink NLD, Student Transmission Status	Review pending outbound messages to Studielink.
Studielink Transmission Override	SAD_SL_TRANSMIT	Student Admissions, Processing Studielink NLD, Student Transmission Override	Override student outbound message transmissions to Studielink.
Studielink Equation Setup	SAD_SL_EQ_SETUP	Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Equation Setup	Assign optional equations to determine the messages to be sent to Studielink.
Studielink Message Evaluation	SAD_RUN_SL_EQN	Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Message Evaluation	Run the optional process that determines the student messages that need to be sent to Studielink.
Generate Studielink Messages	SAD_SL_RUN_OUT	Student Admissions, Processing Studielink NLD, Process Studielink, Generate Studielink Messages	Generate and transmit Studielink messages.
Outbound Suspense	SAD_SL_SUSPOU_MGMT	Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Outbound Suspense	Review and correct the values for outbound messages that the system cannot send to Studielink. After entering the missing values or after updating the Campus Solutions tables, regenerate the messages by running the Generate Studielink Messages process.
Prior Education	SAD_SL_SUSP_OUT_2	Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Prior Education	Review and correct the Prior Education values for outbound messages that the system cannot send to Studielink.
Address	SAD_SL_SUSP_OUT_3	Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Address	Review and correct the address values for outbound messages that the system cannot send to Studielink.

Page Name	Definition Name	Navigation	Usage
Studielink Outbound Log Issues	SAD_SL_LOGS_OUT	Student Admissions, Processing Studielink NLD, Process Studielink, Resolve Outbound Issues, Studielink Outbound Log Issues	Resolve outbound issues.

Reviewing Pending Outbound Messages

Access the Studielink Transmissions page (Student Admissions, Processing Studielink NLD, Student Transmission Status).

Studielink Transmissions

ID: 0061 Henkie Gerritsen
Academic Institution: PeopleSoft University - NLD
Academic Career: Bachelor (NLD)
Academic Program: Business Economics
Academic Plan: H00010

BRINcode: NL02
Academic Year: 2008
☒ Evaluate Student

Message Status

Transmit Message	Transmit Date	Transmit Message	Transmit Date
☐ GBA Verification (04)		☐ Address Change (06)	
☐ Prior Education (10)		☐ Payment of Fees (19)	
☐ Cost of Fees (20)		☐ Message to Applicant (22)	
☒ Receipt of Application (31A)		☐ Confirm Enrollment (31B)	
☐ Discontinue Not Allowed (31D)		☐ Discontinuation Allowed (31E)	
☐ Withdrawal Confirmed (31G)		☐ Non First Year (31H)	
☐ Professional Duties (31I)		☐ Language Test (31J)	
☐ Prior Ed Deficiency (31K)		☐ Lot Drawing Result (31N)	
☐ Phase Change (31O)		☐ Confirm Re-enrollment (31C)	
☐ Profession Requirements (31P)			
☐ Confirmation Receipt (31Q)			
☐ New Application (34)		☐ Death of Student (37)	

Studielink Transmissions page

This page enables limited access users the ability to see which messages are queued for transmission. Users have access to update the Evaluate Student check box.

The Evaluate Student check box is used to identify those records that will be eligible to generate messages to Studielink. This check box becomes active when either Message 03 is loaded, or when an application is entered manually for a Studielink applicant. When the message creation and evaluation process runs, the process selects only those records for processing. Clearing the check box stops all communication to Studielink.

If any of the message check boxes are selected, this indicates that the message will be generated and sent to Studielink the next time that the Generate Studielink Message process runs. The Transmit Date column indicates the last time that the corresponding message was sent.

Overriding Outbound Message Transmissions

Access the Studielink Transmission Override page (Student Admissions, Processing Studielink NLD, Student Transmission Override).

Studielink Transmission Override

ID: ADNLD002 Hannie Closson BRINcode: NL02
Academic Institution: PeopleSoft University - NLD Academic Year: 2009
Academic Career: Bachelor (NLD) ☒ Evaluate Student
Academic Program: Business Economics
Academic Plan: H00010

Message Status			
Transmit Message	Transmit Date	Transmit Message	Transmit Date
☐ GBA Verification (04)		☐ Address Change (06)	
☐ Prior Education (10)		☐ Payment of Fees (19)	
☐ Cost of Fees (20)		☐ Message to Applicant (22)	
☐ Receipt of Application (31A)		☐ Confirm Enrollment (31B)	
☐ Discontinue Not Allowed (31D)		☐ Discontinuation Allowed (31E)	
☐ Withdrawal Confirmed (31G)		☐ Non First Year (31H)	
☐ Professional Duties (31I)		☐ Language Test (31J)	
☐ Prior Ed Deficiency (31K)		☐ Lot Drawing Result (31N)	
☐ Profession Requirements (31P)		☐ Confirm Re-enrollment (31C)	
☐ Phase Change (31O)			
☐ Confirmation Receipt (31Q)			
☐ New Application (34)		☐ Death of Student (37)	
☒ Correction (End) Enroll (48)			

Studielink Transmission Override page

If you have access, you can manually select messages to be generated. Select the appropriate check boxes to indicate which messages you want to send to Studielink for a student.

Warning! You should be careful when manually setting a message to send. Ensure that the student's information has been updated so that the message is generated with the correct information.

Determining Outbound Messages

Access the Studielink Message Evaluation page (Student Admissions, Processing Studielink NLD, Process Studielink, Studielink Message Evaluation).

Studielink Message Evaluation

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Parameters		Customize	Find	View All	First	1 of 1	Last
*Institution	*Academic Year						
PSUNV	2006						

Studielink Message Evaluation page

Institution	Enter the institution for which the message evaluation process will be run.
Academic Year	Enter the academic year for those equations that require the academic year passed to the evaluation. Refer to the list of provided equations to determine which equations use this value.

Note. This field is not used as a selection criterion.

When the process runs, the system does the following:

1. Selects for processing all student records for which the Evaluate Student check box has been selected (PS_SAD_SL_TRANSMIT.SAD_SL_EQTN_STAT = 'Y') and where the student has been assigned a Studielink ID number.
2. Executes all the equations that have been set up.
3. If the equation passes (the conditions are met), the corresponding Message Status field becomes Y.

This appears as a selected check box on the Studielink Transmission Status page.

4. If the equation fails (the conditions are not met), nothing happens.
5. If a message is currently activated for transmission, the process does not run the equation.

The process log that is generated will list each student record that has passed any equations. If any messages are queued to be generated, the Generate Studielink Message process can now be run to generate and transmit these messages.

Sending Outbound Messages to Studielink

Access the Generate Studielink Messages page (Student Admissions, Processing Studielink NLD, Process Studielink, Generate Studielink Messages).

Generate Studielink Messages page

Enter the academic institution for which you want to generate outbound messages. The system will create the appropriate XML messages and send them to Studielink

When the Generate Studielink Message process runs, the system does the following:

1. Selects the records for the academic institution with messages selected in the Studielink Transmission page.
2. Assembles each message in the XML staging tables.

You can view these messages in the Studielink Message Data component. These messages have a blank Transaction Status value.

3. For each student where a message is to be generated, a row appears in the Student Transaction Summary component.

The system automatically transmits messages to Studielink as they are generated.

Once the institution has established a connection with Studielink, messages are transmitted. For each message sent, a response record returns to the institution to acknowledge the receipt of the message. The system continues to attempt to send the message to Studielink until the message is successfully received. At this point the Transaction Status value in the Studielink Message Data component is set to *P - Processed*. If an error occurs during the transmission, the Transaction Status value is set to *E - Transmission error*.

Ensure that you select the Send XML Messages check box for all normal processing. Clearing this check box enables you to test the outbound process without generating the actual XML message. If you clear the check box, the process fills the staging tables with data and you can then review the staging data using the Studielink Message Data component. You can use this method of clearing the Send XML Messages check box for testing on testfloor environments.

Resolving Suspended Outbound Messages

Access the Outbound Suspense page (Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Outbound Suspense).

Outbound Suspense

Prior Education

Address

Outbound Suspense Management

Transaction Direction:

Outbound

Transaction DateTime:

04/03/2009 9:28:34.000000AM

Sequence Number:

1

Index ID:

2009-04-03T09:28:34.00-TST000001-34

Source ID:

vchmsg34sisinschrijving

*Transaction Status:

Suspended

Suspense Reason:

Missing Required field

Customize Find First 1-11 of 11 Last						
Studielink Message	Sequence	Message Set Number	Message Number	Message Text		
34	1	14907	1029	Birth Country not found	+	-
34	2	14907	1031	Birth Place not found	+	-
34	3	14907	1032	Nationality not found	+	-
34	4	14907	1062	Consent not found	+	-
34	5	14907	1034	Verification Status not found	+	-
34	6	14907	1068	Academic Level not found	+	-
34	7	14907	1051	Enrollment Manner not found	+	-
34	8	14907	1078	Appartment number not found	+	-
34	9	14907	1033	Email id not found	+	-
34	10	14907	1041	Exam Year, Exam Month or Exam Day not found	+	-
34	11	14907	1037	QCL Verification Status not found	+	-

Outbound Suspense page (1 of 4)

Studielink Number:

Student Number: TST000001

Preferred Firstname: Nel

Process from CS Tables

Lastname: Wassenaar

Initials: N

First Name: Nelleke

Consent Statement:

Name Prefix:

Date of Death:

Gender: NA

Verified by Brincode:

Birthdate: 1970-01-01

Verified by Institution: NLD Brincode 02

Birth City:

Verified by Employee:

Place of Birth:

Date of Verification:

Nationality:

Activity Date: 2009-04-03

Education Block Fields

Brincode institution: NL02 PSNLD

Enrolment Manner:

Academic Career: BAC

Academic load: Part-time

Program Code: 04401 H010

Academic Level:

Alt Program Code: H00010

Academic Year: 2008

Sub Institute: 01

Start month: 9

Start Occasion: reg.2008

Outbound Suspense page (2 of 4)

▼ Address for Msg 04/06			
Address Type:		Mobile number:	
Street Name:		Phonenumber:	020/655-4345
Apartment Number:		Foreign Address Country	
City:		Foreign addressline 1	
Postal Code:		E-mail Address:	
Country Code			

▼ Academic Details			
Program Code:	04401	Reason for Ending:	
Academic load:	2	Start Occasion:	reg.2008
Enrolment Manner:		Verified status:	
Start month:	9	Lot Drawing Nbr:	
Status:	V	Drawing result:	
Status Prof Req:	N	Updated Load:	
Stat ProfDuties:	N	Updated City:	
First Year:	False	Updated Month from:	
Language Test:	Not Applicable	Updated Form of Study:	
Academic Level:		Updated Academic Level:	
Academic Year:	2008	Updated Sub Institute:	

Outbound Suspense page (3 of 4)

▼ Payment Details

Payment Method name:

Payment Mode:

☐ 

Foreign Accountnbr:

Bank Country:

Bankname:

Payment method bank/giroacct:

Payed:

☐ 

Paidbyinstitute:

Pay inst Name:

Tuition Amount:

Number of periods:

▼ Message 22

Anouncement Header:

Anouncement Text:



[Message Data](#)

Outbound Suspense page (4 of 4)

Access the Prior Education page (Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Prior Education).

Outbound Suspense

Prior Education

Address

Prior Education

Transaction Direction:

Outbound

Transaction DateTime:

04/03/2009 9:28:34.000000AM

Sequence Number:

1

Index ID:

2009-04-03T09:28:34.00-TST000001-34

Source ID:

vchmsg34sisinschrijving

*Transaction Status

Suspended

Suspense Reason:

Missing Required field

Customize | Find |

First 1-11 of 11 Last

Studielink Message	Sequence	Message Set Number	Message Number	Message Text		
34	1	14907	1029	Birth Country not found	+	-
34	2	14907	1031	Birth Place not found	+	-
34	3	14907	1032	Nationality not found	+	-
34	4	14907	1062	Consent not found	+	-
34	5	14907	1034	Verification Status not found	+	-
34	6	14907	1068	Academic Level not found	+	-
34	7	14907	1051	Enrollment Manner not found	+	-
34	8	14907	1078	Appartment number not found	+	-
34	9	14907	1033	Email id not found	+	-
34	10	14907	1041	Exam Year, Exam Month or Exam Day not found	+	-
34	11	14907	1037	QCL Verification Status not found	+	-

Prior Education page (1 of 2)

Studielink Number:

Education Block

Find | View All First 1 of 1 Last

Brincode Prior Education

Prior Education

00053

Prior Education Description

Diploma

T

Graduation Year

Graduation Month

Graduation Day

Verified Status

☐

Date of Verification

Verified by Brincode

☐

Verified by Institution

NLD Brincode 02

Verified by Employee

Edu Country Cd

☐

Customize | Find

First 1 of 1 Last

	Plan Code	Subject Verificationstatus	Verified by Brincode		
1				+	-

Prior Education page (2 of 2)

Access the Address page (Student Admissions, Processing Studielink NLD, Process Studielink, Outbound Suspense Management, Address).

Outbound Suspense
Prior Education
Address

Address

Transaction Direction: Outbound
Transaction DateTime: 04/03/2009 9:28:34.000000AM
Sequence Number: 1
Index ID: 2009-04-03T09:28:34.00-TST000001-34
Source ID: vchmsg34sisinschrijving
***Transaction Status:** Suspended

Suspense Reason: Missing Required field

Customize	Find	First	1-11 of 11	Last		
Studielink Message	Sequence	Message Set Number	Message Number	Message Text		
34	1	14907	1029	Birth Country not found	+	-
34	2	14907	1031	Birth Place not found	+	-
34	3	14907	1032	Nationality not found	+	-
34	4	14907	1062	Consent not found	+	-
34	5	14907	1034	Verification Status not found	+	-
34	6	14907	1068	Academic Level not found	+	-
34	7	14907	1051	Enrollment Manner not found	+	-
34	8	14907	1078	Appartment number not found	+	-
34	9	14907	1033	Email id not found	+	-
34	10	14907	1041	Exam Year, Exam Month or Exam Day not found	+	-
34	11	14907	1037	QCL Verification Status not found	+	-

Address page (1 of 2)

Studielink Number:

Address			
		Find View All First 1 of 1 Last	
Address Block type	Identification	Apartment Number	
Street Name	spekstraat	Postcodecheck	F
Postal Code	8756GH	Country Code	6030
City	Amsterdam		

Address	
Find View All First 1 of 1 Last	
Foreign addressline 1	
Foreign addressline 2	
Foreign addressline 3	
Foreign cntry	

Address page (2 of 2)

The Generate Studielink Messages process will populate the staging tables with data and evaluate whether the data in the Campus Solutions tables meet the requirements as defined by Studielink. If the data in the Campus Solutions tables do not meet the Studielink requirements or if fields required for Studielink are missing, the process suspends the message in the Outbound Suspense Management component (SAD_SL_SUSPOU_MGMT). For the suspended message, the Transaction Status field displays the value *Suspended*. The Suspense Reason field displays the reason for suspending the message. The component also displays one or more error messages and lists the necessary corrective action.

Select the Process from CS Tables check box if you want to correct the message data in the Campus Solutions tables. If you select the Process from CS Tables check box and then run the Generate Studielink Messages process, the process re-selects all values from the Campus Solutions tables for generating the outbound message. You need not select this check box, if you want to correct the message data in the Outbound Suspense Management component. For example, if you have corrected the data in the Outbound Suspense Management component, cleared the Process from CS Tables check box, and then run the Generate Studielink Messages process, the process selects values supplied on the Outbound Suspense Management component to generate the outbound message.

The following scenarios illustrate how you can correct the message data:

- Message cannot be sent to Studielink as the required Last Name field is missing: To correct the message, enter Last Name in the Outbound Suspense page, set the Transaction Status to *Unprocessed*, and then run the Generate Studielink Messages process to send the message to Studielink.
- Message cannot be sent to Studielink as the required Last Name field is missing: To correct the message, enter last name in the Names page (Campus Community, Personal Information (Student), Add/Update a Person), select the Process from CS Tables check box, set the Transaction Status to *Unprocessed*, and then run the Generate Studielink Messages process to send the message to Studielink.

The following table lists the error messages and the required corrective action:

<i>Suspend Message</i>	<i>Resolution</i>
Last name not found (1105)	The system cannot send the message to Studielink because the required Last Name value is missing. You can enter the last name on the Outbound Suspense page or the Names page (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details; click the Names link).
Preferred first name not found (1107)	The system cannot send the message to Studielink because the required Preferred First Name value is missing. You can enter the preferred first name on the Outbound Suspense page or the Names page.
Initials not found (1108)	The system cannot send the message to Studielink because the required Initials value is missing. You can enter the initials on the Outbound Suspense page or the Names page.
Name royal prefix not found (1075)	The system cannot send the message to Studielink because the required Name Royal Prefix value cannot be validated against the Name Royal Prefix Table. You can enter the name royal prefix on the Outbound Suspense page or the Names page.
Birth date not found (1030)	The system cannot send the message to Studielink because the required Birth Date value is missing. You can enter the birth date on the Outbound Suspense page or the Biographical Details page (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details).
Birth place not found (1031)	The system cannot send the message to Studielink because the required Birth City value is missing. You can enter the birth city on the Outbound Suspense page or the Biographical Details page (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, click the Birth Information link to update the Birth Location).
Birth country not found (1029)	The system cannot send the message to Studielink because the required Birth Country value is missing. You can enter the Place of Birth value on the Outbound Suspense page or the Biographical Details page (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, click the Birth Information link to update the Birth Country).
Gender not found (1109)	The system cannot send the message to Studielink because the required Gender value is missing. You can enter the Gender value on the Outbound Suspense page or the Biographical Details page (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details).

<i>Suspend Message</i>	<i>Resolution</i>
Nationality not found (1032)	The system cannot send the message to Studielink because the required Nationality value is missing. You can enter nationality on the Outbound Suspense page or correct the GBA Nationality Code on the Regional page (Campus Community, Personal Information (Student), Add/Update a Person, Regional).
Apartment number not found (1078)	The system cannot send Message 04/06 to Studielink because the required Number value is missing. You can enter the Apartment Number on the Outbound Suspense page (Address for Msg 04/06 region) or the Addresses page (Campus Community, Personal Information (Student), Add/Update a Person, Addresses). For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page (Campus Community, Personal Information (Student), Add/Update a Person, Addresses). Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.
Postal code not found (1079)	The system cannot send Message 04/06 to Studielink because the required Postal code value is missing. You can enter the postal code on the Outbound Suspense page (Address for Msg 04/06 region) or the Addresses page. For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.
City not found (1064)	The system cannot send Message 04/06 to Studielink because the required City value is missing. You can enter the city on the Outbound Suspense page (Address for Msg 04/06 region) or the Addresses page. For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.

<i>Suspend Message</i>	<i>Resolution</i>
Country not found (1065)	The system cannot send Message 04/06 to Studielink because the required Country code value is missing. You can enter a NLD address in the Country field or a foreign address in the Foreign Address Country field of the Outbound Suspense page (Address for Msg 04/06 region) or you can enter the country code on the Addresses page. Each Campus Solutions country code must have a corresponding GBA country code setup (Set Up SACR, Foundation Tables, Academic Structure NLD, GBA Country Code Table). For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.
No valid street address found (1082)	The system cannot send Message 04/06 to Studielink because the required Street Name value is missing. You can enter the street name on the Outbound Suspense page (Address for Msg 04/06 region) or the Addresses page (Campus Community, Personal Information (Student), Add/Update a Person, Addresses). For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.
Foreign Address 1 not found (1121)	The system cannot send Message 04/06 with foreign address to Studielink because the required Foreign Address 1 value is missing. You can enter the Foreign Address line 1 value on the Outbound Suspense page (Address for Msg 04/06 region) or the Addresses page. Foreign Address field is set up on the Foreign Address Setup page (Student Admissions, Processing Studielink NLD, SetUp Studielink, Foreign Address Setup). For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.

<i>Suspend Message</i>	<i>Resolution</i>
No valid address country code (1083)	The system cannot send Message 04/06 to Studielink because the required Country code value is missing. You can enter a NLD address in the Country field or a foreign address in the Foreign Address Country field of the Outbound Suspense page (Address for Msg 04/06 region) or you can enter the country code on the Addresses page. Each Campus Solutions country code must have a corresponding GBA country code setup (Set Up SACR, Foundation Tables, Academic Structure NLD, GBA Country Code Table). For any Studielink message in which one or more address types may be sent, the address must be corrected in Campus Solutions. Select the Process from CS Tables check box and correct the address in the Campus Solutions system using the Addresses page. Studielink Address Type for Message 4 is <i>Permanent</i>. Studielink Address Type for Message 6 is <i>Mailing</i>.
No valid phone number (1084)	The system cannot send Message 04/06 to Studielink because the required phone number value is missing or has an invalid format. You can enter the phone number in the Outbound Suspense page (Address for Msg 04/06 region) or the Biographical Details page. Phone Type is <i>HOME</i>.
No mobile phone number found (1085)	Message 04/06 cannot be sent to Studielink as the required phone number value is missing or has an invalid format. You can enter the mobile number in the Outbound Suspense Management component (Address for Msg 04/06) or the Biographical Details page. Phone Type is <i>CELL</i>.
Email ID not found (1033)	Message 04/06 cannot be sent to Studielink as the required email address value is missing or has an invalid format. You can enter the email ID on the Outbound Suspense Management component (Address for Msg 04/06) or the Biographical Details page. Email Type is set up.
Verification status not found (1034)	Applies to Message 04. Message cannot be sent to Studielink as the required Verification Status value is missing. You can enter the Verified Status on the Outbound Suspense page (Academic Details) or you can correct the ID Verification Status value on the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD).
No verified BRINcode for prior education subject (1100)	Studielink message is sent with Prior Education Subjects. The subjects have been verified by the institution but valid BRINcode has not been supplied (Student Admissions, Processing Studielink NLD, Student Prior Education Info).

<i>Suspend Message</i>	<i>Resolution</i>
No Prior Education Subject Verification Status Message 10 (1045)	Studielink message is sent with Prior Education Subjects. The subjects have been verified by institution but valid verification code has not been supplied (Student Admissions, Processing Studielink NLD, Student Prior Education Info).
Prior Education Registration Number not found (1038)	Studielink message is sent with Prior Education Data. Prior Education Code is not present. This can occur if the Prior Education Code is not present for the Prior Education info stored for this particular student (Student Admissions, Processing Studielink NLD, Student Prior Education Info).
Prior Education Registration Name not found (1039)	Studielink message is sent with Prior Education Data. Prior Education Name cannot be found. This can occur if the Prior Education Code does not have a valid prior education description in the system (Set Up SACR, Foundation Tables, Academic Structure NLD, Prior Education Table NLD).
Prior Education Diploma not found (1040)	Studielink message is sent with Prior Education Data. Prior Education Diploma is not present. This can occur if the Prior Education Diploma field is not checked for the Prior Education info stored for the particular student (Student Admissions, Processing Studielink NLD, Student Prior Education Info).
Prior Education Country not found (1125)	Studielink Message is sent with Prior Education Data. The country value does not exist but the Prior Education is a non-NLD diploma code 00801. You can correct the Prior Education Country code on the Prior Education page of the Outbound Suspense Management component or the Student Prior Education Info page (Student Admissions, Processing Studielink NLD, Student Prior Education Info).
Prior Education Exam Year not found (1041)	Prior education Diploma check box is selected but there is no valid diploma end date (Student Admissions, Processing Studielink NLD, Student Prior Education Info).
BRIN/Institution not found (1102)	Outbound message does not have Institution and/or BRINcode verification field.
No end date (1042)	Applies to Message 31D. No end date was found. Correct the end date value by navigating to Student Admissions, Processing Studielink NLD, Withdrawal/Cancel Requests.
No end reason (1044)	Applies to Message 31D/31G/31E. No end reason was found. Correct the end reason value by navigating to Student Admissions, Processing Studielink NLD, Withdrawal/Cancel Requests or correct the Reason for Ending value on the Outbound Suspense page (Academic Details region).

<i>Suspend Message</i>	<i>Resolution</i>
No program code (1046)	Applies to messages containing student academic details for Studielink. The academic program code is missing or incorrect. Correct the Student Records or Applicant Program Code and select the Process from CS Tables check box or correct the Program Code on the Outbound Suspense page (Academic Details region).
No deficiency information (1087)	Applies to Message 31K. There is no Deficiency Code or the Deficiency Code is invalid for messages sent from the institution to Studielink. Correct the Deficiency Status for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Deficiency Status for applicants on the Application Regional page (Student Admissions, Application Maintenance, Maintain Applications, Application Regional) or correct the Deficiency Status on the Outbound Suspense page (Academic Details region).
No academic load (1047)	Applies to messages containing student academic details for Studielink. The Academic Load is missing or incorrect. Correct the Academic Load for students on the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program). Correct the Academic Load for applicants by navigating to Student Admissions, Application Maintenance, Maintain Applications, Application Program Data or correct Academic Load on the Outbound Suspense page (Academic Details region).
No academic year (1066)	Applies to messages containing student academic details for Studielink. The Academic Year is missing or incorrect. Correct the Academic Year for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Academic Year for applicants on the Application Regional page or correct Academic Year in the Outbound Suspense page (Academic Details region)
No academic level (1068)	Applies to messages containing student academic details for Studielink. The Academic Level is missing or incorrect. Correct the Acad Level Higher Education value for students on the Academic Prog Higher Education page. Correct the Academic Level for applicants on the Application Regional page or correct Academic Level on the Outbound Suspense page (Academic Details region)
No Form of Study (1051)	Applies to messages containing student academic details for Studielink. The Form of Study is missing or incorrect. Correct the Form of Study Higher Education for students on the Academic Prog Higher Education page. Correct the form of study for applicants on the Application Regional page or correct Enrollment Manner on the Outbound Suspense page (Academic Details region).

<i>Suspend Message</i>	<i>Resolution</i>
No Tuition Payment Number of Terms (1081)	Applies to Message 20. The system retrieves the Number of Terms from the contract specified on the Studielink Load Parameters page. Correct the contract or correct Number of Periods on the Outbound Suspense page (Payment Details region). Number of Periods may be corrected to zero because no actual payment terms information may be supplied from the Outbound Suspense Management component. Alternatively, to correct the number of periods to be selected from Campus Solutions, verify that the contract has been set up correctly. The contract in question is the Contract Number assigned on the Studielink Load Parameters page.
No tuition amount (1048)	Applies to Message 19. The tuition amount is zero or does not exist. Correct the Payment Amount for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the payment amount for applicants on the Application Regional page or correct the tuition amount on the Outbound Suspense page (Payment Details region).
No Paid By Institute Name (1954)	Applies to Message 19. The Institution Name value does not exist. Correct the Paid at Institution Name field for students on the Academic Prog Higher Education page. Correct the Paid at Institution Name field for applicants on the Application Regional page or correct Paid by Institute Name on the Outbound Suspense page (Payment Details region).
No Paid By Institute (1052)	Applies to Message 19. The Institution (BRINcode) field does not exist. Correct the Paid at Institution field for students on the Academic Prog Higher Education page. Correct the Paid at Institution field for applicants on the Application Regional page or correct the Paid by Institute on the Outbound Suspense page (Payment Details region).
No Payment Name (1053)	Applies to messages containing payment details. The system retrieves the Payment Name from the Bank Account Name field. Correct this value on the Student Bank Accounts page (Student Financials, Student Financials NLD, Student Bank Accounts) or correct the Payment Method Name on the Outbound Suspense page (Payment Details region).
No Payment Mode (1088)	Applies to messages containing payment details. The system retrieves the Payment Mode from the Studielink Form of Payment field. Correct the Studielink Form of Payment for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Studielink Form of Payment for applicants on the Application Regional page or correct the Payment Mode on the Outbound Suspense page (Payment Details region).

<i>Suspend Message</i>	<i>Resolution</i>
No Foreign Accountnumber (1091)	The system retrieves the Foreign Account Number from the Bank Account field for the account where the tuition check is on and the country code does not equal NLD. Correct this value on the Student Bank Accounts page (Student Financials, Student Financials NLD, Student Bank Accounts) or correct Foreign Accountnbr on the Outbound Suspense page (Payment Details region).
No bank name (1092)	The system retrieves the Bank Name from the Bank Account Name field for the account where the tuition check is on. Correct this value on the Student Bank Accounts page or correct Bankname on the Outbound Suspense page (Payment Details region).
No bank country (1094)	The system retrieves the Bank Country from the Bank Account Country field for the account where the tuition check is on. Correct this value on the Student Bank Accounts page or correct the Bank Country on the Outbound Suspense page (Payment Details region).
Indication Tuition Paid not found (1049)	Applies to messages containing payment details. The system retrieves the payment indicator (Paid or Not Paid) from the Payment Indicator field. Correct the Payment Indicator value for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Payment Indicator field for applicants on the Application Regional page (Student Admissions, Application Maintenance, Maintain Applications, Application Regional) or correct the Payed field value on the Outbound Suspense page (Payment Details region).
Studielink Number not found (1058)	The system cannot send the message to Studielink because Studielink number is missing. Studielink number is a required field and cannot be corrected using the Outbound Suspense Management component. The student must be a Studielink participant. Ensure that the student's Studielink number is present in the External System table with External System type <i>Studielink</i> (Campus Community, Personal Information (Student), Identification (Student), External System ID).
No valid start occasion (1061)	Applies to messages where Start Occasion is a required field. Correct the Start Month or Effective Date and verify the Start Occasion setup (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Start Occasion).

<i>Suspend Message</i>	<i>Resolution</i>
No valid start month found (1067)	Applies to messages where Start Month is a required field. The system retrieves the start month from the Start Month field for applicants. The system retrieves the start month from the effective date for matriculated students and students with re-enrollment . Correct the effective date for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Start Month for applicants on the Application Regional page or correct Start Month on the Outbound Suspense page (Academic Details region).
No draw result found (1097)	Applies to Message 31N. The drawresult field must exist and must be valid. You can correct this field for only applicants. Use the Application Regional page or correct Drawing Result on the Outbound Suspense page (Academic Details region).
No draw sequence found (1098)	Applies to Message 31N. The drawsequence field must exist and must be valid. You can correct this field for only applicants. Use the Application Regional page or correct Lot Drawing Nbr on the Outbound Suspense page (Academic Details region).
No phase change fields found (1096)	Applies to Message 31O. For applicants or students minimum one of the fields, that may be changed through message 31O, must exist. Correct for applicants or students, or correct on the Outbound Suspense page (Academic Details region)
No job requirement status found (1110)	Applies to Message 31P. Professional Duties Status value is incorrect or does not exist. Correct the Professional Duties Status value for students on the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD). Correct the Professional Duties Status value for applicants on the Application Regional page (Student Admissions, Application Maintenance, Maintain Applications, Application Regional) or correct the Professional Duties Status value on the Outbound Suspense page (Academic Details region).
No language requirement status found (1111)	Applies to Message 31J. The Language Test Status value is incorrect or does not exist. Correct the Language Test Status value for students on the Academic Prog Higher Education page. Correct the Language Test Status value for applicants on the Application Regional page or correct the Language Test Status value on the Outbound Suspense page (Academic Details region).

<i>Suspend Message</i>	<i>Resolution</i>
No deficiency status found (1112)	Applies to Message 31K. Deficiency Status value is incorrect or does not exist. Correct the Deficiency field value for students on the Academic Prog Higher Education page. Correct the Deficiency value for applicants on the Application Regional page or correct the Deficiency value on the Outbound Suspend page (Academic Details region).
No professional duties status found (1113)	Applies to Message 31P. Professional Requirements Status value is incorrect or does not exist. Correct the Professional Requirements value for students on the Academic Prog Higher Education page. Correct the Professional Requirements value for applicants on the Application Regional page or correct Professional Requirements value on the Outbound Suspend page (Academic Details region).
No death date found (1114)	Death of Student message 37 has been initiated but decedent data cannot be found. Correct in the system or on the Outbound Suspend Management component.
No valid country code setup found (1119)	Foreign address is to be processed but the system cannot find a valid foreign address setup.

The system does *not* display error messages for the following:

- Consent not found: If consent status has not been set, the system sets the consent statement value to *X* (Unknown). You can correct the Consent Statement status on the Administer Student Higher Education page (Records and Enrollment, Higher Education NLD, Student Higher Education NLD).
- Language code not found: If language preference has not been set, the system sets the language preference value to *nl* (Dutch). The Language Cross Reference table must have been set up correctly (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Language Code Setup).
- Address Type not found: Each message has a predefined address type. The Address Type Cross Reference table must have been set up correctly (Student Admissions, Processing Studielink NLD, Setup Studielink, Studielink Address Usage).
- Mobile phone country code not found: Default value is 31 for NLD.
- Verifier user or user code not found: When Verified Status is entered for prior education, the system should automatically store the Name associated with the Operator ID for the user.

Resolving Outbound Issues

Access the Studielink Outbound Log Issues page (Student Admissions, Processing Studielink NLD, Process Studielink, Resolve Outbound Issues, Studielink Outbound Log Issues).

Studielink Outbound Log Issues

Outbound Issues log

Studielink Message: 31B Confirm Enrollment in Program
Transaction Date: 02-06-2010
Studielink Number: 000000002 [Application Maintenance](#)
EmplID: 3169 [Student Records NL](#)
Academic Institution: PSNLD [Student Transmission Override](#)
Academic Career: Bachelor

Sequence	Academic Year	Academic Program	Academic Plan	BRHcode	Log Status	Message Number	Message Text	Last Updated User Name	Last Updated Date-Time Stamp	Delete
1	1 2010	U001	U00001	NL03	New	718	Student Records data - no match.	PS	02-06-10 03:57:49,000000	Delete

Studielink Outbound Log Issues page

This page captures data for exception scenarios in which an outbound message is triggered but no data can be found for the applicant or the student. Use this data to resolve the issue.

Set the log status to reflect whether the issue is *In progress* or *Closed*. The initial value created by the outbound (SAD_SL_OUT) process is *New*.

Changing Student Status Using Studielink

This section discusses the process by which Studielink manages changes to a student's status at the institution, the steps that must be taken to ensure the proper communication between the institution and Studielink, and how to:

- Process student re-enrollment requests.
- Confirm re-enrollment.
- Process student withdrawal requests.
- Generate Studielink conversion or enrollment messages with the batch process.

Pages Used to Change Student Status Using Studielink

Page Name	Definition Name	Navigation	Usage
Academic Prog Higher Education	SSR_STD_PRG_NLD	Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD	View and update the student's NLD specific information while the student is matriculating at the institution.
Studielink Transmission Override	SAD_SL_TRANSMIT	Student Admissions, Processing Studielink NLD, Student Transmission Override	Override student outbound message transmissions to Studielink.

Page Name	Definition Name	Navigation	Usage
Studielink Cancellation Requests	SSR_SL_WDRW_NLD	Student Admissions, Processing Studielink NLD, Withdrawal/Cancel Requests	Review and process student withdrawal requests.
Generate Studielink Conversion/Enrollment Messages	SAD_SL_CONV_RUNCTL	Student Admissions, Processing Studielink NLD, Process Studielink, Generate SLConversion/Enroll, Generate Studielink Conversion/Enrollment Messages	Generate message 34C and message 34E for selected continuing students for registration with Studielink.

Processing Student Re-enrollment Requests

Students must re-enroll each academic year at their institution. Students who are registered with Studielink must initiate this process directly with Studielink. After the student has notified Studielink of their re-enrollment request, a Message 25 is generated and sent to the institution. This is the institution's official notification of the student's re-enrollment. When the institution has ensured that the student has met the re-enrollment requirements, it sends a Message 31C to Studielink to report the status. Students who choose not to re-enroll must also notify Studielink of their decision. Studielink also needs to notify the institution of this status change.

A student is considered re-enrolled when two rows exist in the Academic Prog Higher Education page for the upcoming academic year. One is a *REN*R row which indicates the request for re-enrollment. The second is a *PAY*M row, which indicates that the student has made payment for the upcoming year.

Processing Re-enrollment Requests from Studielink

For the institution, the process begins with the receipt of Message 25 from Studielink. The message automatically loads into the staging tables. When the posting process runs, the Studielink ID identifies the student and the re-enrollment information loads into the application. The system adds a new row to the Acad Prog Higher Education page where the Program Action Higher Education value is set to *REN*R – *Re-Enrollment*. All re-enrollment information contained in the message loads into the page, including payment information, if present, in the Studielink Payment Information group box.

Access the Academic Prog Higher Education page (Records and Enrollment, Higher Education NLD, Student Records Higher Edu NLD).

If the student has requested a change in manner (academic load) in Message 25, this will also cause a new row to be inserted in the student's academic program to reflect the change.

To complete the re-enrollment process, the student must pay their fees for the new year. Insert a new row in the page to verify that the student's payment has been accepted. The Program Action Higher Education value is set to *PAY*M – *Payment*.

Confirming Re-enrollment

Access the Studielink Transmission Override page (Student Admissions, Processing Studielink NLD, Student Transmission Override).

Once the student's re-enrollment process is complete, the institution must send Message 31C to Studielink to notify them of the decision. Message 31C can be initiated manually by using the Studielink Transmission Override page and selecting the Confirm Re-enrollment (31C) check box and setting to appropriate re-enrollment year, or use the Studielink Equation process to automatically identify the student and initiate the message.

Processing Re-enrollment Cancellation Requests from Studielink

Students can request to not re-enroll for the following year. This is also communicated in Message 25. If this occurs, a new row is added to the Acad Prog Higher Education page where the Progr Action Higher Education value is set to *NRNR – No Re-Enrollment*. No response to Studielink is required.

Processing Student Withdrawal Requests

Students who want to withdraw from the institution in which they have been enrolled, or withdraw their application for admission, must initiate the process through Studielink. Once the request has been made, Studielink submits to the institution Message 35, which contains the withdrawal request. When the message posts, the system checks to see if the student has been admitted to the institution for the requested program. If the student is not yet admitted (Program Status is set to *AP*), the application is automatically cancelled during the posting process. You are not required to take any action. If the student is already admitted or matriculated, the cancellation request can be viewed in the Studielink Cancellation Request page. This page contains a list of all students with a cancellation or withdrawal request that has not been completed. As each student record is evaluated and processed by the administrator, the record is deleted from the page.

The following table lists what you must do to complete the review of cancellation requests received in Message 35:

<i>Student Active In</i>	<i>User Action Required</i>	<i>Message Transmitted</i>
Admissions, Program Status = AP (Applicant) or AD (Admitted but not matriculated)	None.	Automatic cancellation of application: Message 31G is automatically queued for transmission.
Admissions, Program Status = AC (Active in program) and payment has not yet been received. NO PAYM action row exists in student records higher education record for this academic year.	None.	Automatic cancellation of application or matriculation: Allow cancellation: Message 31G or 31E is queued for transmission.

Student Active In	User Action Required	Message Transmitted
Student records, Program Status = AC (Active in program) and Payment has been received. PAYM action row in student records higher education exists for this academic year.	Review student records data. Update if required. Update the Academic Prog Higher Education page if a change in the Studielink status is made. Update Studielink Cancellation Requests page .	Update of the record in the Studielink Cancellation Requests page will result in the following: Allow cancellation: Message 31E is queued for transmission. Not allow cancellation: Message 31D is queued for transmission.

Access the Studielink Cancellation Requests page (Student Admissions, Processing Studielink NLD, Withdrawal/Cancel Requests).

Studielink Cancellation Requests

ID:	0032	Dale van Jarrett	Academic Institution:	PSNLD
Academic Career:	BAC	Bachelor (NLD)	Sequence Number:	2
BRINcode:	NL01	NLD Brincode 01	Academic Program:	H001
Process Status:	Unprocessed		Message Date:	05/07/2006

Cancellation Details

Request Status:	Undetermnd
Academic Year:	2005
End Date:	05/08/2006
End Reason:	HE and RP 1996
Request Refund:	True
Explanation:	This be a remark

[Application Data](#)
[Student Program/Plan](#)
[Message Data](#)

Studielink Cancellation Requests page

Process Status

The current status of the staff review of the student's cancellation request. This should be updated by the reviewer when appropriate. Values are:

Complete: The review of the student's request is complete. All records have been updated.

In Process: The review process has begun but is not completed.

Skip: The record will not be reviewed.

Unprocessed: The default status that is set when the Message 35 is loaded.

Request Status	Indicates the decision status of the withdrawal request. Values are: <i>Undetermined</i> : No decision has been made. This is the default value. <i>Allowed</i> : The institution approved the withdrawal request. <i>Not Allowed</i> : The institution denied the withdrawal request.
Academic Year	The year in which the withdrawal is requested.
End Date	The stop date of enrollment.
End Reason	The stop reasons reported to Studielink. Values are: <i>Students Suspended, Article 7.42.1.a, Article 7.42.1.d, Article 7.42.1.c, HE and RP 1996, Article 7.42.1.b, Post Exam, Death of Student</i> , and <i>Article 7.42.e.</i> For a complete definition of the field values, see Berichten specificaties Studielink2 2006, Koppelvlak - A, Versie 1.0, Status Definitief, Document ID : 60172.2.4.4.3-01
Request Refund	Indicates whether a tuition refund will be granted to the student.
Explanation	Free form text to Studielink.
Application Data	Click to access the Admissions Application Maintenance page and view information about the student's application.
Student Program/Plan	Click to access the Student Program/Plan page and view further information about the student's record.
Message Data	Click to access all of the fields contained in Message 35.

Resolving Withdrawal Requests for Matriculated Students

If the student has already been matriculated and has paid tuition fees, the academic records staff process the student's withdrawal request and the student's academic program status becomes updated. In Studielink, when a matriculated and enrolled student requests a cancellation or withdrawal, the institution must report whether the request has been approved or declined. When a withdrawal request is denied, the record must be updated on the Studielink Cancellation Requests page. Document the explanation for the denial on the page and send it to Studielink in Message 31D. The system automatically sends it when the process status for the record is set to *Complete* and the request status is set.

When a withdrawal request is approved, you must update the student's academic program. You must also update the end date and the reason for the approval, and indicate whether tuition restitution will be granted in the Studielink Cancellation Requests page. The information is then ready to be sent to Studielink in Message 31E.

When a withdrawal request is not approved for a student, update the decision in the Studielink Cancellation Request page and generate Message 31D.

Resolving Withdrawal Requests in the Admissions Maintenance Pages

Admissions staff must update the status of students who have been admitted, but not yet program activated, at the time they request a cancellation of their admission. If approved, the staff must cancel the student's application and update the Studielink Cancellation Request page. If denied, update the Studielink Cancellation Request page to reflect the decision. The system generates either Message 31D or 31G when the page is updated.

Generating Studielink Conversion or Enrollment Messages with the Batch Process

Use the Generate Studielink Conversion/Enrollment Messages page to generate message 34C and message 34E.

Converting Existing Students to Studielink

Institutions are required to register their current student population with the Studielink system. Institutions register their current students by generating a specially formatted application Message 34 for their eligible students and transmitting the message to Studielink. Studielink, in activating the student, issues a Studielink ID to each student.

A separate process enables you to generate this special conversion message, which is internally referred to as Message 34C. The process selects any active students (PS_ACAD_PROG.PROG_STATUS = 'AC') using the selection criteria defined in the run control page. If there is enough information to generate a complete Message 34C, the system creates a message and sends it to Studielink.

Sending Message 34E to Studielink

Students are currently required to yearly update their Studielink status online at the Studielink website and indicate whether or not they want to continue their program enrollment for the subsequent year. When students update their status, message 25 is sent to the institution. In some cases students do not update their re-enrollment. In other cases, the current status in Studielink does not reflect the correct status in Campus Solutions. For this reason the institution may use the Studielink Enrollment process to send message 34E for a group of students. The process selects any active students (PS_ACAD_PROG.PROG_STATUS = 'AC') using the selection criteria defined in the run control page. If there is enough information to generate a complete Message 34E, the system creates a message and sends it to Studielink.

Message 34E differs from a regular message 34C in the following areas:

- No conversion default values are sent but only values from Studielink tables.
- No prior education data is sent to Studielink
- No bank account details or payment information are sent to Studielink.
- The Studielink status for students sent is always set to the value *I: Registered/Enrolled*

Generating Message 34C and Message 34E

Access the Generate Studielink Conversion/Enrollment Messages page (Student Admissions, Processing Studielink NLD, Process Studielink, Generate SL Conversion/Enroll, Generate Studielink Conversion/Enrollment Messages).

Generate Studielink Conversion/Enrollment Messages

Run Control ID: Studielink [Report Manager](#) [Process Monitor](#) [Run](#)

Selection Criteria [Find](#) | [View All](#) First **1 of 1** Last

*Academic Institution: *Academic Career:

*Academic Year: Academic Program:

Generate Conversion ☐

Generate Enrollments ☒

☒ Student Override ☒ Resend Enrolled Emplids

Population Selection

Selection Tool:

Attached File: [Upload File](#) [Delete File](#) [View File](#)

File Mapping: [Edit File Mapping](#) [Preview Selection Results](#)

Generate Studielink Conversion/Enrollment Messages page

Academic Institution	Enter the institution from which the process will select student records to process. This field is required.
Academic Year	Enter the academic year of the records that you want to process. The academic year is defined in the Academic Prog Higher Education page. This field is required.
Academic Career	Enter the academic career of the records that you want to process. This field is required.
Academic Program	Enter a value to restrict the selection to a specific academic program. This field is optional.
Generate Conversion and Generate Enrollments	Select an option to process conversion or enrollment messages.
Student Override	When you select this check box, the Population Selection group box becomes available. Use the population selection process to select records for which to generate conversion or enrollment messages. For information about population selection: See <i>PeopleSoft Campus Community Fundamentals 9.0 PeopleBook</i>, Using the Population Selection Process

- Resend Conversion Emplids** This check box is available only if you select the Generate Conversion option.
- After you enter the required fields, select this check box to select individual student records for the conversion resend process. You can select only records that meet the selection criteria.
- This check box must always be selected, even when sending an initial batch of student IDs that has been selected by population selection.
- Resend Enrolled Emplids** This check box is available only if you select the Generate Enrollments option.
- After you enter the required fields, select this check box to select individual student records for the enrollment resend process. You can select only records that meet the selection criteria.

Running the Generate Conversion/Enrollment with option Generate Conversion

The process attempts to create a complete Message 34C from the student's PeopleSoft Student Records information. If the information is complete, the system creates the message and makes it available in several Studielink pages throughout PeopleSoft Campus Solutions:

1. The Student Studielink Transaction Summary page shows that the Message 34C was created and sent. From this page you can view the data contained in the message.
2. The system inserts a new row into the Academic Prog Higher Education page to indicate the creation of the conversion process for the student and to assign the student's current Studielink status of I - Enrolled.

The system also assigns a new Program Action Higher Education code of *SLCN – Studielink Conversion*.

3. Once Studielink receives the conversion message, it assigns a unique Studielink number to the student and sends the information back to the institution in Message 30 (Studielink ID change).

Once the ID is assigned, the student is now considered an active Studielink participant. You can access the Studielink Education Block Information from the Detail link on the Academic Prog Higher Education page.

Running the Generate Conversion/Enrollment Process with option Generate Enrollment

The conversion process attempts to create a complete Message 34E from the student's PeopleSoft Student Records information. If the information is complete, the system creates the message and makes it available for viewing in PeopleSoft Campus Solutions: The Student Studielink Transaction Summary page shows that the Message 34E was created and sent. From this page you can view the detailed data contained in the message by clicking on the index ID hyperlink.

When the conversion process does not have enough information to generate a complete conversion message, the system writes missing data elements in the process message log for each student. Each missing data element requires a specific corrective action. When you correct all errors for a student, the process then generates and transmits the complete Message 34C.

Message Log			
Process			
Instance:	436	Type:	Application Engine
Name:	SAD_SL_CONV	Description:	Studielink Conversion Process
Customize Find View All First 1-9 of 9 Last			
Severity	Log Time	Message Text	Explain
	12:33:02PM	Conversion Process for Emplid 0037 Begins...	Explain
	12:33:02PM	Email Address needs to be setup for Emplid 0037.	Explain
	12:33:02PM	Language Code needs to be setup for Emplid 0037.	Explain
	12:33:02PM	Birth Location needs to be setup for Emplid 0037.	Explain
	12:33:02PM	Consent Statement needs to be setup for Emplid 0037.	Explain
	12:33:02PM	Verified status needs to be setup for Emplid 0037.	Explain
	12:33:02PM	Conversion Process Failed for Emplid 0037	Explain
	12:33:17PM	Published message with Pub ID of 77 to request to have report added in folder GENERAL	Explain
	12:33:17PM	Successfully posted generated files to the report repository	Explain

Example of message log with missing data elements

The following table lists error messages and the required corrective action:

Error Message	Resolution
BRINcode needs to be set up. Can't find a valid BRINcode in the home campus table.	Verify that the student's program is defined in the Academic Program Table, Home Campus NLD page. If not, correct the settings. To override academic program settings, access the Acad Prog Higher Education page and click the Detail link for the current row on the page. Enter the missing BRINcode on the Studielink Education Block page.
Sub institute needs to be set up. Can't find a valid sub institute in the home campus table.	Verify that the student's program is defined in the Academic Program Table, Home Campus NLD page. If not, correct the settings. To override academic program settings, access the Acad Prog Higher Education page and click the Detail link for the current row on the page. Enter the missing BRINcode on the Studielink Education Block page.

Error Message	Resolution
CIP Code needs to be set up. Program code needs to be set up.	Verify that the student's program is defined in the Academic Program Table, Taxonomy/Campus page. If not, correct the settings. To override academic program settings, access the Acad Prog Higher Education page and click the Detail link for the current row on the page. Enter the missing program code on the Studielink Education Block page.
Start Month needs to be set up.	Access the Acad Prog Higher Education page and click the Detail link for the current row on the page. Enter the missing Start Month on the Studielink Education Block page.
Email Address needs to be set up.	Update in PeopleSoft Campus Community.
Gender needs to be set up.	Update in PeopleSoft Campus Community.
Birthdate needs to be set up.	Update in PeopleSoft Campus Community.
Birth Country needs to be set up.	Update in PeopleSoft Campus Community – Birth Info.
Birth Location needs to be set up.	Update in PeopleSoft Campus Community – Birth Info.
Nationality needs to be set up.	Access the PeopleSoft Campus Community Add/Update Person component. Access the Regional page and set the GBA Nationality Code field to <i>Active</i> .
Academic Load needs to be set up.	Access the Student Program/Plan page and update the Acad Load field.
Academic Level needs to be set up.	Access the Acad Prog Higher Education page and set the Academic Level Higher Ed field.
Enrolment Manner needs to be set up.	Access the Acad Prog Higher Education page and set the Form of Study Higher Education field.

Chapter 28

(NLD) Managing the BRON Interface

This chapter provides an overview of BRON and discusses how to:

- Set up the BRON interface.
- Set up NT2 for BRON.
- Set up BRON prior education.
- Create and send the BRON file.
- Review the BRON file before sending.
- View BRON history by student.
- Manage BRON return file processing.
- Manage GBA data.
- Manage BRON snapshot files.

Understanding BRON

Regional Education Centre (*Regionaal Opleidings Centrum* or ROC) institutions must exchange data regarding students and their enrollment and exams in an electronic format with Base Register Education (*Basis Register Onderwijs* or BRON), a data register managed by Information Maintenance Group (*Informatie Beheer Groep* or IBG). Once you have set up the interface, the Dutch as a second language course (*Nederlands als tweede taal* or NT2) and prior education for BRON, perform the following steps to fulfill BRON requirements:

1. Create the BRON export file.
2. Review the export file before sending.
3. Send the batch file to BRON.
4. Import the BRON return file and update the export holding table.
5. Make changes to data regarding students and their enrollment and exams in your system and resend the changes to BRON.
6. Compare GBA data with data in the application and update tables if necessary.
7. Import and review snapshot files to determine whether BRON is sending the Dutch funding council (*Centrale Financien Instellingen* or CFI) accurate, up-to-date data.

8. After you update the export holding table based on the snapshot file, resend the export files to BRON, if necessary.

See Also

PeopleSoft Student Records 9.0 PeopleBook, "Processing Class Enrollment Transactions," (NLD) Indicating Student Paper Information

Setting Up the BRON Interface

To set up the BRON interface, use the BRON Setup component (SAD_BR_INST_NLD).

This section discusses how to:

- Define BRON setup.
- Define additional BRON values.
- Set up BRON by sector.
- Set up BRON programs.
- Including and excluding students in BRON batch.

Pages Used to Set Up the BRON Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
BRON Setup	SAD_BR_INST_NLD	Student Admissions, Base Register NLD, BRON Setup, BRON Setup	Define BRON values for an institution and BRINcode.
Install Options BRON	SAD_BR_INST_TBL	Student Admissions, Base Register NLD, BRON Setup, Install Options BRON	Define additional BRON values for an institution and BRINcode.
BRON Setup by Sector	SAD_BR_SECT_NLD	Student Admissions, Base Register NLD, BRON Setup, BRON Setup by Sector	Define BRON setup by educational sector.
Match Career to BRON Career	SAD_BR_XL_CRCR_NLD	Select the Acad Career option and click the Show career panel button in the BRON career selection group box on the BRON Setup by Sector page.	Link your institution's academic careers to BRON career codes.

Page Name	Definition Name	Navigation	Usage
Match Academic Load to BRON Career	SAD_BR_XL_LDCR_NLD	Select the Acad Load option and click the Show career panel button in the BRON career selection group box on the BRON Setup by Sector page.	Link your institution's academic loads to BRON career codes.
Match Academic Load to BRON Intensity	SAD_BR_XL_LDLD_NLD	Select the Acad Load option and click the Show Ld Pan button in the BRON Load Selection group box on the BRON Setup by Sector page.	Link your institution's academic loads to BRON intensity codes.
BRON Setup Program	SAD_BR_PRG_NLD	Student Admissions, Base Register NLD, BRON Setup, BRON Setup Program	Define the programs that you do not want to send to BRON and select LNV programs for this institution and BRINcode.
BRON Include Students	SAD_BR_STD_INCL	Student Admissions, Base Register NLD, BRON Setup, BRON Include Students	Use to create BRON Batch for only a selection of students.
BRON Exclude Students	SAD_BR_STD_EXCL	Student Admissions, Base Register NLD, BRON Setup, BRON Exclude Students	Use to create BRON batch, which excludes selected students.

Defining BRON Setup

Access the BRON Setup page (Student Admissions, Base Register NLD, BRON Setup, BRON Setup).

BRON Setup

BRON Setup by Sector

BRON Setup Program

*Institution:

PSNLD

PSFT School NLD

*BRINcode:

NL01

NLD Brincode 01

Location:

0

Int. Org.Nbr:

1

PVE Version:

1.1

Name Type

Primary

Address Type

Home

Name Type GBA

Primary

Address Type GBA

Home

BRON Setup page

Institution	Enter the institution for which you want to set up BRON.
BRINcode	Select a BRINcode for this institution. Define BRINcodes on the BRINcode Table page. BRINcodes are allocated by the IBG. They identify schools or locations within an institution.
Location	Enter a code for this location and BRINcode. The location code is a code that has been set up by the institution to identify the delivery point. You assign the code yourself and then provide this information to BRON so that BRON can recognize the delivery source within the institution.
Note. An institution can have more than one delivery location.	
Int Org Nbr (internal organization number)	Enter an internal organization number to identify the organization that is responsible for the delivery to BRON. This information is sent in the BRON interface, but it is not used by BRON. This is for informational purposes only.
PVE Version	Enter the PVE version of the IBG requirement document used.
Name Type	Enter the name type for the data that is delivered to BRON.
Address Type	Enter the address type for the data that is delivered to BRON.
Name Type GBA	Enter the name type for the automatic update of GBA data.
Address Type GBA	Enter the address type for the automatic update of GBA data.

Defining Additional BRON Values

Access the Install Options BRON page (Student Admissions, Base Register NLD, BRON Setup, Install Options BRON).

Install options BRON page

Start Accountant Audit	Enter the start date for the accountancy period. From this date onwards, not all mutations can be sent to BRON without accountant approval and an indication of Accountant for the BRON delivery file.
First Date Accountancy Audit	Enter the first funding tally date (October 1st of the academic year).
Last Date Accountancy Audit	Enter the second funding tally date (February 1st of the academic year).
Addresstype BRON BPV	Select the address type for selection of BRON BPV information in the send file.
Record BPV Description BRON	Select to indicate which record will be used to select BPV description. Select EXT_ORG_TBL or ORG_LOCATION. Other options require adjustment of the BPV process, which is a customization.
Field BPV Descr BRON	Select the field from Record BPV Description BRON that will be used to select BPV description.
Exclude/Include Students	If you select this check box, you can send a select student group to BRON or exclude a select group from being sent to BRON.

- Update SSN/OND numbers

If you select this check box, the BRON return process automatically updates SSN or OND numbers. If you clear this check box, they are not updated automatically.
- Read/Update CREBO codes

If you select this check box, the BRON return process automatically updates missing BPV accreditation CREBO codes. If you clear the check box, they will not be updated/inserted automatically.

Setting Up BRON by Sector

Access the BRON Setup by Sector page (Student Admissions, Base Register NLD, BRON Setup, BRON Setup by Sector).

BRON Setup

BRON Setup by Sector

BRON Setup Program

Institution:

PSNLD

PSFT School NLD

BRINcode:

NL01

NLD Brincode 01

Find

View All

First

1 of 3

Last

*Educational Sector:

Prof. Educ

Start Date:

01/01/2002

Last Sequence Nbr:

End Date:

01/01/2005

Hand. Sel:

Disability

Student Attribute:

Risk student value:

Careers by Sector

Find

View All

First

1 of 1

Last

*Academic Career

Vocational Training (NLD)

BRON career selection

Acad Career

Acad load

BRON Load Selection

Acad Load

BRON Setup by Sector page

- Educational Sector

Enter an educational sector. Three educational sectors exist: *Education*, *Professional Education*, and *VAVO*. You must set up each sector. You run the BRON Delivery process for each education sector.
- Start Dateand End Date

Enter the start and end dates for this education sector within this institution and BRINcode. When you run the BRON Delivery process, the process finds only students who were matriculated during the dates that you enter here.

Hand Sel (handicap select)	Select how you want the BRON Delivery process to determine whether students are handicapped. Select one of the following values: <i>Attribute</i>: Select if you want the BRON Delivery process to determine whether students are handicapped by using attributes. Enter the student attribute that is used to indicate handicapped students in the Student Attribute field. <i>Disability</i>: Select if you want the BRON Delivery process to determine whether students are handicapped by a check box on the Disability page at Workforce Administration, Personal Info, Disability, Disabilities. <i>Studentgrp</i> (student group): Select if you want the BRON Delivery process to determine whether students are handicapped by using student groups.
Student Attribute	If you select <i>Attribute</i> in the Hand Sel field, enter the student attribute that is used to indicate handicapped students here.
Risk student value	Select the student attribute that you want to use to indicate when a student is at risk of being turned down for funding for a program.
Careers by Sector - Academic Career	Select the academic careers that are within this educational sector. The BRON Delivery process sends information only about students who are in the careers that you enter here.
BRON Career Selection - Acad Career	Select to link your institution's academic careers to BRON career codes. Because you can define your academic careers however you want, you must link your careers to BRON careers to share data.
BRON Career Selection - Acad Load	If you use academic load instead of career, select this option to link your institution's academic loads to BRON career codes.
BRON Load Selection - Acad Load	Link your institution's academic loads to BRON intensity values. Because you can define your academic loads however you want, you must link your loads to BRON load values to share data.

Setting Up BRON Programs

Access the BRON Setup Program page (Student Admissions, Base Register NLD, BRON Setup, BRON Setup Program).

BRON Setup

BRON Setup by Sector

BRON Setup Program

Institution:

PSNLD

PSFT School NLD

BRINcode:

NL01

NLD Brincode 01

Find | View All

First

1 of 3

Last

Educational Sector:

Professional Education

Programs not to BRON

Find | View All

First

1 of 1

Last

Academic Program:

+

-

Select LNV Programs

Find | View All

First

1 of 1

Last

Academic Program:

+

-

BRON Setup Program page

Programs not to BRON

Academic Program

Select the academic programs that you do not want to send to BRON. The BRON Delivery process does not send data about students in this academic program.

Select LNV Programs

Academic Program

Select the agricultural (LNV) academic programs for which you must send partial qualifications to BRON.

Including and Excluding Students in BRON Batch

Access the BRON Include Students page (Student Admissions, Base Register NLD, BRON Setup, BRON Include Students).

BRON Setup Program

BRON Include Students

BRON Exclude Students

Institution:

PSNLD

PeopleSoft University - NLD

BRINcode:

25LU

MBO and VAVO Brincode

Find | View All

First

1 of 2

Last

Educational Sector:

Professional Education

Clear

Participants Included for BRON

Find

First

1 of 1

Last

ID:

SRN043

POORT,JACO3 72

+

-

BRON Include Students page

The Bron Exclude Students page is similar to the BRON Include Students page. The following descriptions apply to both pages.

- ID

Enter or remove one or more student IDs to include or exclude the records from batch.
- Clear

Click this button to clear the Participants Included for BRON or Participants Excluded for BRON group boxes.

Setting Up NT2 for BRON

To set up NT2 for BRON, use the BRON Setup NT2 component (SAD_BR_TEST_NLD). This section discusses how to define NT2 setup.

Page Used to Set Up NT2 for BRON

Page Name	Definition Name	Navigation	Usage
BRON Setup NT2	SAD_BR_TEST_NLD	Student Admissions, Base Register NLD, BRON Setup NT2 Test, BRON Setup NT2	Define NT2 result ranges by academic level. NT2 courses are courses that are specifically designed for foreign students. You must record entry levels and progress of students. Registration of NT2 is mandatory and required by BRON.

Defining NT2 Setup

Access the BRON Setup NT2 page (Student Admissions, Base Register NLD, BRON Setup NT2 Test, BRON Setup NT2).

BRON Setup NT2

Test ID: NT2

Find | View All

First 1 of 5 Last

*Effective Date: 01/01/1900

Status: Active

HEGIS Code: 990.01

NT2-Speaking

Find | View All

First 1-4 of 6 Last

Academic Level	NT2 Result from	NT2 Result to
Basic User/Breakthrough (NLD)	1	2
Basic User/Waystage (NLD)	3	4
Independ. User/Threshold (NLD)	5	6
Independ. User/Vantage (NLD)	7	8

BRON Setup NT2 page

- HEGIS Code

Enter the HEGIS code for this test.
- Academic Level

Enter the academic levels for which you want to define result ranges.
- NT2 Result from and NT2 Result to

Enter the grade range for each possible academic level. For example, if you select *Basic User/Breakthrough (NLD)* in the Academic Level field, and defined the range of 1 to 2 in these fields, then students who score a 1 or 2 in the NT2 course will be given the Basic User/Breakthrough academic level.

Setting Up BRON Prior Education

To set up BRON prior education, use the BRON Setup Prior Education component (SAD_BR_XLPE_NLD). This chapter discusses how to define BRON prior education setup.

Page Used to Set Up BRON Prior Education

Page Name	Definition Name	Navigation	Usage
BRON Setup Prior Education	SAD_BR_XLPE_NLD	Student Admissions, Base Register NLD, BRON Setup Prior Education, BRON Setup Prior Education	Map your institution's prior education codes to BRON prior education codes.

Defining BRON Prior Education Setup

Access the BRON Setup Prior Education page (Student Admissions, Base Register NLD, BRON Setup Prior Education, BRON Setup Prior Education).

BRON Setup Prior Education

Customize Find View All  First 1-2 of 2 Last					
	*Prior Education	Description	Program Status	*BRON Prior Education	
1	00053 	HAVO N+T	Completed	HAVO	+ -
2	00053 	HAVO N+T	Failed	VMBO Theoretical Education	+ -

BRON Setup Prior Education page

Prior Education	Select your institution's prior education codes that you want to map to BRON prior education codes.
Program Status	Select a program status for this prior education code. Values are <i>Completed</i> , <i>Failed</i> , and <i>Running</i> . The system uses both the prior education code and the program status to determine the BRON prior education code.
BRON Prior Education	Select the BRON prior education code that corresponds to your institution's prior education code and program status.

Creating and Sending the BRON File

This section provides an overview of the BRON Delivery process and discusses how to create and send BRON files.

Understanding the BRON Delivery Process

You first run the BRON Delivery process (SRBRONNL) to create records in the BRON Export Holding table by selecting the BRON Create File check box. The records in the BRON export holding table are grouped by a unique batch number for every educational sector within an institution. After you have reviewed the file to be sent on the BRON Maintain Before Send page, you send the file by running the BRON Delivery process again and selecting the BRON Send File check box. When you send the file, the batch group is frozen. Then, the next time you run the creation process, the process compares the data in your system with the data that you sent in the last batch to BRON. Only changes are sent in subsequent files. Each subsequent file has a higher batch number.

Page Used to Create and Send the BRON File

Page Name	Definition Name	Navigation	Usage
BRON Delivery Process	SAD_BR_RUNDL_NLD	Student Admissions, Base Register NLD, BRON Delivery Process, BRON Delivery Process	Create and send the BRON file.

Creating and Sending the BRON File

Access the BRON Delivery Process page (Student Admissions, Base Register NLD, BRON Delivery Process, BRON Delivery Process).

BRON Delivery Process

Run Control ID: bron-vavo-return [Report Manager](#) [Process Monitor](#) [Run](#)

Run Control Parameters

*Academic Institution: PSNLD PeopleSoft University - NLD

*BRINcode: 25LU MBO and VAVO Brincode

*Educational Sector: VAVO

☒ BRON Create file

☒ BRON Send file ☒ Override Accountancy Mutation

File Path: c:\temp\

☐ Last Send

Responsible: Accountant ☒ Selected Students Only

BRON Delivery Process page

BRINcode	Enter a BRINcode with which to create or send the BRON file. Define BRINcode values on the BRON Setup page.
Educational Sector	Enter the educational sector for which to create or send the BRON file.
BRON Create File	Select to create records in the BRON export holding table.
BRON Send File	Select to send the BRON file. The File Path and Last Send fields appear.
File Path	If you selected the BRON Send File check box, enter the file path of the file that you want to send.
Last Send	Select this check box if this is the last file that you are sending for the year.
Responsible	Select the responsible party for this file. Values are <i>Accountant</i> , <i>CFI</i> , and <i>Institution</i> .
Override Accountancy Mutation	Select this check box to override Accountancy Mutation Stop settings. If you select this check box, the batch process sends mutations that are usually not allowed during the accountancy stop period.
Selected Students Only	This check box is available only if the Exclude/Include Students check box is selected on the Install Options BRON page. Select the check box to activate settings from BRON set up for this Batch file creation run.

Reviewing the BRON File Before Sending

This section discusses how to view the outgoing file data. before sending it to BRON.

Pages Used to Review the BRON File Before Sending

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
BRON Maintain Before Send	SAD_BR_DELM_NLD	Student Admissions, Base Register NLD, BRON Maintain Before Send, BRON Maintain Before Send	View the outgoing file data before sending to BRON.
View/Maintain Key Data	SAD_BR_DEL_305_NLD	Click the Key link on the BRON Maintain Before Send page.	View key data from the outgoing data file.
View/Maintain Key Change Data	SAD_BR_DEL_305_NLD	Click the Key Ch (key change) link on the BRON Maintain Before Send page.	View key change data from the outgoing data file.

Page Name	Definition Name	Navigation	Usage
View/Maintain Personal Data	SAD_BR_DEL_310_NLD	Click the Pers (personal) link on the BRON Maintain Before Send page.	View personal data from the outgoing data file.
View/Maintain Enrollment Data	SAD_BR_DEL_320_NLD	Click the Enroll (enrollment) link on the BRON Maintain Before Send page.	View enrollment data from the outgoing data file.
View/Maintain Period Data	SAD_BR_DEL_321_NLD	Click the Period link on the BRON Maintain Before Send page.	View period data from the outgoing data file.
View/Maintain BPV Data	SAD_BR_DEL_322_NLD	Click the BPV link on the BRON Maintain Before Send page.	View BPV data from the outgoing data file.
View/Maintain Result Data	SAD_BR_DEL_323_NLD	Click the Result link on the BRON Maintain Before Send page.	View result data from the outgoing data file.
View/Maintain Enrollment Data	SAD_BR_DEL_325_NLD	Click the Enroll (enrollment) link on the BRON Maintain Before Send page.	View enrollment data from the outgoing data file.
View/Maintain Result Data	SAD_BR_DEL_326_NLD	Click the Result link on the BRON Maintain Before Send page.	View result data from the outgoing data file.
View/Maintain Subject Data	SAD_BR_DEL_327_NLD	Click the Subject link on the BRON Maintain Before Send page.	View subject data from the outgoing data file.
View/Maintain NT2 Data	SAD_BR_DEL_328_NLD	Click the NT2 link on the BRON Maintain Before Send page.	View NT2 data from the outgoing data file.
View/Maintain Exam Period Data	SAD_BR_DEL_331_NLD	Click the Exam link on the BRON Maintain Before Send page.	View exam period data from the outgoing data file.
View/Maintain Exam Subjects Data	SAD_BR_DEL_332_NLD	Click the Exam Subjects link on the BRON Maintain Before Send page.	View exam subject data from the outgoing data file.

Viewing the Outgoing File Data

Access the Maintain BRONBatch before send page.

Maintain BRONBatch before send

Institution: PSNLD PeopleSoft University - NLD
BRINcode: NL01 NLD Brincode 01
Educ Sect: Professional Education

Last Nbr: 1 **Total Mutations:** 1
Creation Date: 10/04/2004 **Total Nr. of records:** 5

Customize | Find | View All | First 1 of 1 Last

Enrollments Details

EmpID	Career	Career Nbr	Key	Key Ch.	Pers.	Enroll	Period	BPV	Exam
1 SRN109	BOL	0	Key	Key Ch.	Pers.	Enroll	Period	BPV	Exam

Maintain BRONBatch before send page

- Key** Click to view general identification data of a BRON mutation and student. This relates to the record type 305 in the BRON delivery file.
- Key Ch(key change)** Click to view the key change information (changes in SOFI number, address, birth date, and gender). This relates to the record type 306 in the BRON delivery file.
- Pers (personal)** Click to view the student's personal data. This relates to record type 310 in the BRON delivery file. This data is created only when no SOFI number or Educational number is known to identify the student. BRON uses this information to track down the person in GBA.
- Enroll (enrollment)** Click to view general information about a specific enrollment. This relates to record types 320, 325, and 330 of the BRON delivery file.
- Period** Click to view funding codes by BRON period. This relates to record type 321 of the BRON delivery file. This is used only for BRON sector Professional Education.
- BPV** Click to view the BPV (internship training at external organizations) data for this enrollment. This relates to record type 322 of the BRON delivery file. This is used only for BRON sector Professional Education.
- Exam** Click to view result data belonging to the enrollment. This relates to record types 323, 326, and 331 of the BRON delivery file.
- Course** Click to view course data belonging to this enrollment. This relates to record types 327 and 332 of the BRON delivery file. This does not apply to the BRON sector Professional Education.
- NT2** Click to view NT2 data that is related to the enrollment. This relates to record type 328. This is used only for BRON sector Education.

Viewing BRON History by Student

This section discusses how to view BRON history by student.

Page Used To View BRON History by Student

Page Name	Definition Name	Navigation	Usage
BRON History per Student	SAD_BR_BRON_HIST	Student Admissions, Base Register NLD, BRON History per student, BRON History per student	Review data sent to BRON and received from BRON per student. You can create subsets of information—for example, specify a record type, file record status, and narrow the selection of fields that appear.

Viewing BRON History by Student

Access the BRON history per student page (Student Admissions, Base Register NLD, BRON History per student, BRON History per student).

BRON history per student

Bert Wiegel

SSRNL00005

Educational Sector VAVO

Last Sequence Nbr:

Record Type:

305

Record Status:

Approved

Enrollment Sequence number:

Academic Career:

Student Career Nbr:

Fetch Data

Show

☐ Returnfile information

☐ Period Data

☒ Key

☐ BPV

☐ Key Change

☐ Exam Results

☐ Personal Data

☐ VAVO Examination Information

☐ Key Values PS

☐ VAVO Exam Course

☐ Enrollments

☐ Education Information

BRON Delivery History

Customize | View All

First 1 of 1 Last

Last Sequence Nbr	Date send	Record Type	Mut Type	Status	Seg Num	NID	Educ Number	Date of Birth	Sex	Postal Code
1	10-08-2009	305		Approved	5			01-01-1988	Male	8745 KL

BRON Current Situation

Customize | Find | View All

First 1-2 of 2 Last

ID	Academic Career	Nbr	Effective Date	Seg	Academic Program	Approved Academic Load	Program Action	Action Reason	Campus	Admit Term
1	SSRNL00005	VAVO	0 01-08-2007	2	R007	Full-Time	MATR		MAIN	2070
2	SSRNL00005	VAVO	0 01-08-2007	1	R007	Full-Time	APPL		MAIN	2070

BRON history per student

Selection Criteria

You can alter the subset of information that appears by toggling the Selection Criteria fields as well as specify which particular fields from the subset appear on the page.

Fetch Data

Click this button to refresh the page data after the selection criteria have been changed.

Last Sequence Nbr

Enter the last sequence number to view data from this batch number only.

Record Type

Select a record type. Only data from the specified record type appears.

Record Status

Select a record status. Only data with this status appears. Select from: *Approved, Created, Rejected, and Sent.*

Enrollment Sequence number

Use in combination with the Enrollments check box to show enrollments records fields with specified enrollment sequence number only.

Academic Career and Student Career Nbr

Enter values here to select data for only the academic career and career number that you specify.

Show

Toggle one or more of the fields in the Show group box to affect the fields that appear in the BRON Delivery History Grid.

Returnfile Information	If you select this check box, the grid fields BRON-signals and Message appear.
Key	If you select this check box, the grid fields NID (Social Security Number), Educ Number (Education Number), Date of Birth, Sex (Gender) and Postal Code appear.
Key Change	If you select this check box, the grid fields Mod SOFI nr. (changed Social Security Number), Mod Birthdt (changed Date of Birth), Mod Sex (changed Gender), Mod. Postal (changed Postal Code) and Mod Ctry Cd (changed Country Code from Address) appear.
Personal Data	If you select this check box, the grid fields Last Name, Name Royal Prefix and First Name appear.
Key Values PS	If you select this check box, the grid fields Academic Career, Career Number, Effective date, Seq (Effective Sequence), Acad Prog (Academic Program), Approved Academic Load, and Form of Study appear.
Enrollments	If you select this check box, the grid fields Enrollment Seq Num (Enrollment sequence number), HEGIS Code, BRON Car (BRON Career), BRON Intensity, Original Enrollment Date, Leave Date (OWO contract date), Real Lv Dt (Real Leave Date from academic program) appear.
Period Data	If you select this check box, the grid fields Term Begin Date and Funding appear.
BPV	If you select this check box, the grid fields BPV Sequence Number, Contract date BPV, Planned end date BPV, Real End date BPV, BRON Internship Company, Knowledge Centre ID BRON BPV, LOB Code, External Organization ID BRON, Organization Location BRON, Name Organization BRON BPV, Postal code Organization BPV, Nbr Organization BPV, CREBO code BRON BPV appear.
Exam Results	If you select this check box, the grid fields Exam date and Indication Diploma appear.
VAVO Examination Information	If you select this check box, the grid fields Academic Year, BRON Exam Result, Title Paper, Result Paper, Internship Grade, and Applied Paper appear.
VAVO Exam Course	If you select this field, the grid fields Exam Subject, Higher Level Exam Subjects, Program level, Indication Diploma Subject, Indication paper, Result school exam, Result Exam, Result Central Exam 1, Result Central Exam 2, Result Central Exam 3, Grade 1 through Grade 3, Grade in Grade list, Indication next term, Indication certificate, Indication combination grade appear.
Education Information	If you select this check box, the grid fields subject sequence number, HEGIS Code, progress Units, Grade Date, NT2 Ability, NT2 start level, NT2 end level and Indication New arrival appear.

BRON Current Situation

This grid shows a summary of Student Academic Program status from Records and Enrollment, Career and Program Information, Student Program/Plan.

Managing BRON Return File Processing

This section provides an overview of BRON Return File processing and discusses how to:

- Import the BRON return file.
- View the BRON return file.
- Run the BRON report.

Understanding BRON Return File Processing

When you send mutations to BRON, BRON performs a detailed functional check to ensure that the mutations are complete and valid. BRON can approve, approve with signal, or reject mutations. Every week, normally BRON sends institutions a file showing the data it has received and whether the mutations were accepted or rejected.

You send mutations to BRON in batch. Because BRON processes these mutations separately, some mutations take longer than others. Consequently, BRON sends return files that contain individual mutations that then must be matched to the batch file in the export holding table. So the BRON Return process (SRBRONNL.sqr) imports the data return files into a return holding table and then matches the individual mutation records to the existing records in the export holding table. The process then updates the export holding table with data from the return file. The process updates the status of the mutation to accepted or rejected, and populates any signals that are attached to the file and the rejection reason, if applicable.

After you run the BRON Return process, use the BRON Return File Inq page to view rejected mutations. Correct the data in your system and create a new delivery file.

You can also generate a report to view the number of BRON file mutations that BRON received from your institution sorted by status and showing rejection reasons, if applicable.

Pages Used to Manage BRON Return File Processing

Page Name	Definition Name	Navigation	Usage
BRON Return Process	SAD_BR_RUNRT_NLD	Student Admissions, Base Register NLD, BRON Return Process, BRON Return Process	Run the BRON Return Process (SRBRONNL) to import data return files from BRON into a holding table.
BRON Return File Inquiry	SAD_BR_RINQ_NLD	Student Admissions, Base Register NLD, BRON Return File Inquiry, BRON Return File Inquiry	View the BRON return files.

Page Name	Definition Name	Navigation	Usage
Display Return Key Data	SAD_BR_RET_405_NLD	Click the Key link on the BRON Return File Inq page.	View key information from the return file.
Display Return Key Change	SAD_BR_RET_406_NLD	Click the Key Ch (key change) link on the BRON Return File Inquiry page.	View key changes from the return file.
Display Return Pers Data (display return personal data)	SAD_BR_RET_410_NLD	Click the Pers (personal) link on the BRON Return File Inquiry page.	View personal data from the return file.
Display Return GPA Data	SAD_BR_RET_411_NLD	Click the GBA link on the BRON Return File Inquiry page.	View GBA data from the return file.
Display Return Enrollment	SAD_BR_RET_420_NLD	Click the Enroll (enrollment) link on the BRON Return File Inquiry page.	View enrollment information from the return file.
Display Return Period	SAD_BR_RET_421_NLD	Click the Period link on the BRON Return File Inquiry page.	View period information from the return file.
Display Return BPV	SAD_BR_RET_422_NLD	Click the BPV link on the BRON Return File Inquiry page.	View BPV information from the return file.
Display Return Results	SAD_BR_RET_423_NLD	Click the Exam link on the BRON Return File Inquiry page.	View exam result information from the return file.
Display Return Errors	SAD_BR_RET_499_NLD	Click the Errors link on the BRON Return File Inquiry page.	View return file errors.
BRON Report	SAD_BR_REPORT_NLD	Student Admissions, Base Register NLD, BRON Report, BRON Report	Generate the BRON Error Messages, BRON Status, and BRON Delivery Summary reports to view the number of BRON file mutations that BRON received from your institution sorted by status and showing rejection reasons, if applicable.

Importing the BRON Return File

Access the BRON Return Process page (Student Admissions, Base Register NLD, BRON Return Process, BRON Return Process).

BRON Return Process

Run Control ID: 1_NA

[Report Manager](#) [Process Monitor](#) Run

Run Control Parameters

*Academic Institution:

PSUNV

PeopleSoft University

*BRINcode:

NL02

NLD Brincode 02

*Educational Sector:

Education

File Path:

n:\user\universityBRON\return

File Name:

BRON Return 1

BRON Return Process page

BRINcode	Enter the BRINcode for which you want to import return files. Define BRINcode values on the BRON Setup page.
Educational Sector	Enter the educational sector for which you want to import return files.
File Path	Enter the file path of the return file. A file path is required.
File Name	Enter the file name of the return file. A file name is required.

Viewing the BRON Return File

Access the BRON Return File Inquiry page (Student Admissions, Base Register NLD, BRON Return File Inquiry, BRON Return File Inquiry).

BRON Return File Inquiry									
Institution	PSNLD	PeopleSoft University - NLD							
BRINcode	NL01	NLD Brincode 01							
Last Nbr	1	Creation Date	10/04/2004						
Record Type	300	Date Received by BRON	09/01/2005						
Rec.Tp.Ret.	402	BRON Report date	09/01/2004						
BRON batch	1								
Nr.Appr.	11	Num. Rej.	0	Nr.Rem. Enr.	0				

Enrollments											
Details											
EmplID	Career	Career Hbr	Key	Key Ch.	Pers.	GBA	Enroll	Period	BPV	Exam	Errors
1 SRN109	BOL	0	Key	Key Ch.	Pers.	GBA	Enroll	Period	BPV	Exam	Errors

BRON Return File Inquiry page

Key Click to view general identification data of a BRON mutation and student. This relates to the record type 405 in the BRON return file. The record is identical to the send 305 record.

Key Ch (key change) Click to view key changes (SOFInumber, address, birth date, gender). This relates to the record type 406 in the BRON return file

Pers (personal) Click to view personal data of a student as found in GBA. This relates to record type 410 in the BRON return file. If the mutation is rejected by BRON, the content of this record is the same as in the 310 record of the delivery.

GBA Click to view additional GBA information. This record appears when a student is found in the GBA system. This relates to the record type 411 in the BRON return file.

Enroll (enrollment) Click to view general information about a specific enrollment. This relates to record types 420, 425, and 430 of the BRON return file.

Period Click to view funding code information by BRON period. This relates to record type 421 of the BRON return file. This is used only for BRON sector Professional Education.

BPV Click to view BPV information data for this enrollment. This relates to record type 422 of the BRON return file. This applies only to the BRON sector professional education.

Exam Click to view result data belonging to the enrollment. This relates to record types 423, 426, and 431 of the BRON return file.

Course	Click to view course data belonging to this enrollment. This relates to record types 427 and 432 of the BRON return file. This does not apply to the BRON sector Professional Education.
NT2	Click to view NT2 data related to the enrollment. This relates to record type 428.
Errors	Click to view BRON errors and signals belonging to this mutation. This relates to record type 499.

Running the BRON Report

Access the BRON Report page (Student Admissions, Base Register NLD, BRON Report, BRON Report).

BRON Report

Run Control ID: 1_NA

Report Manager

Process Monitor

Run

Run Control Parameters

*Academic Institution:

PSUNV

PeopleSoft University

*BRINcode:

NL02

NLD Brincode 02

*Educational Sector:

Education

*Creation Date From:

09/01/2004

31

Last Sequence Nbr:

Record Status:

Created

BRON Report page

BRINcode	Enter the BRINcode for which you want to run the reports. The reports display information for this BRINcode only. Define BRINcode values on the BRON Setup page.
Educational Sector	Enter the educational sector for which you want to run the reports. The reports display information for this educational sector only.
Creation Date From	Enter the date from which you want to run the report. For example, if you enter 09/01/2004, only files that were created on or after that date will be included in the report.
Last Sequence Nbr (last sequence number)	Enter the last sequence number to narrow the report by sequence number.

Record Status	Select a record status to narrow the report by status. Values are: <i>Approved</i> , <i>Created</i> , <i>Rejected</i> , and <i>Sent</i> . For example, if you select <i>Rejected</i> , the report will list only files that were marked as rejected.

Managing GBA Data

This section provides an overview of GBA data and discusses how to process GBA data.

Understanding GBA Data

BRON compares the personal data that your institution sends to them with the data in the municipal basis administration (*Gemeentelijke Basis Administratie* or GBA). If the data that BRON has is different from the data that GBA has, BRON updates their records with the GBA data. The updated personal data from GBA is included in the return file that BRON sends to you. You must run the Process GBA Data process to compare the personal data in the return holding table to the personal data in application tables. The Process GBA Data process stores differences in the Maintain GBA Data table. Use the Maintain GBA Data page to accept or reject the GBA data. Data that has been accepted can then be posted to application tables.

The following data is updated automatically:

- Name (PERSON_NAME)

The system updates the last name and prefix, and uses the name type as defined on the BRON Setup page.
- Address (ADRESSES)

The system updates the street, house number, house number addition, city, and postal code and uses the address type as defined on the BRON Setup page.
- Gender (PERS_DATA_EFFDT)
- SOFI-Number (PERS_NID)
- Education Number (PERS_NID)
- Birthdate (PERSON, or if incomplete, SSR_STUDENT_NLD)

Note. The system overwrites existing data if the Gender, SOFI-Number, Education Number, or Birthdate field is updated. For effective-dated tables, the system inserts a new row with the current date as the effective date.

Pages Used to Manage GBA Data

Page Name	Definition Name	Navigation	Usage
Process GBA Data	SAD_BR_RUNGBA_NLD	Student Admissions, Base Register NLD, BRON Update GBA Process, Process GBA Data	Compare the personal data in the return loading table with the personal data in the export loading table to populate the Maintain GBA Data page with updated personal data from GBA. Also, post the accepted updated personal data to application tables.
Maintain GBA Data	SAD_BR_GBA_NLD	Student Admissions, Base Register NLD, BRON Maintain GBA Data, Maintain GBA Data	Review and accept or reject updated personal data from GBA. You must then use the Process GBA Data page to post the accepted updated personal data to application tables.

Processing GBA Data

Access the Process GBA Data page (Student Admissions, Base Register NLD, BRON Update GBA Process, Process GBA Data).

Process GBA Data

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Group Box

*Academic Institution: PSUNV PeopleSoft University

*BRINcode: NL01 NLD Brincode 01

*Educational Sector: Education

BRON Batchnumber: 015

Action: Update GBA data in Peoplesoft

☒ Update all

☐ Delete Not Accepted data

Process GBA Data page

BRINcode	Enter the BRINcode for which you want to process GBA data. The system will process GBA data for this BRINcode only. Define BRINcode values on the BRON Setup page.
Educational Sector	Enter the educational sector for which you want to process GBA data.
BRON Batchnumber	Enter the batch number that you want to process. This is the batch number assigned by BRON that uniquely identifies a specific BRON return file.
Action	Select the action that you want the Process GBA Data process to perform. Select <i>Fill GBA Interim Table</i> to populate an interim table so that you can accept or reject the personal data sent by BRON. Select <i>Update GBA Data in PeopleSoft</i> to post the accepted personal data to permanent application tables.
Update All	This field appears when you select <i>Update GBA Data in PeopleSoft</i> in the Action field. When you select this check box, the GBA Data update process selects the records with status accepted or the status field empty. You might leave the status field blank if you want to process all data.
Delete Not Accepted Data	This field appears when you select <i>Update GBA Data in PeopleSoft</i> in the Action field. Select this check box to delete all data that is marked rejected. You can accept or reject data on the Maintain GBA Data page.

Managing BRON Snapshot Files

This section provides an overview of BRON snapshot files and discusses how to:

- Import BRON snapshot files.
- Compare the BRON snapshot.

Understanding BRON Snapshot Files

BRON provides a snapshot file to CFI, who uses it to determine funding amounts for your institution. As a service, BRON also provides you the snapshot file that they send to CFI so that you can review it for accuracy and correct discrepancies.

A BRON snapshot file is a point-in-time view of:

- All active enrollments on a certain census date.
- All terminated enrollments in the period of 12 months prior to the census date.
- All enrollments and results achieved that are in BRON for the calendar year of the census date and that are not part of the previous two categories.

To review and correct BRON snapshot files:

1. Run the BRON Import Snapshot process (SAD_BR_SNAP) to import the snapshot file that BRON provides into a holding table.
2. Run the Snapshot Compare process (SRSNCPNL) to compare the data in the snapshot holding table with the data in the export holding table.
3. Review the Snapshot Compare report to determine whether any discrepancies exist.
4. If you find discrepancies in the data between the snapshot and the export holding table, send a new mutation to BRON.

At this stage, the new mutation should be accompanied by the signature of an accountant.

Pages Used to Manage BRON Snapshot Files

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import BRON Snapshot	SAD_BR_RUNSNAP_NLD	Student Admissions, Base Register NLD, BRON Snapshot Import, Import BRON Snapshot	Import the BRON snapshot file.
BRON Compare Snapshot	SAD_BR_RUNSNCM_NLD	Student Admissions, Base Register NLD, BRON Snapshot Compare, BRON Compare Snapshot	Compare the data in the BRON snapshot holding table to the data in the export holding table. Use the Process Monitor to view the report.

Importing BRON Snapshot Files

Access the Import BRON Snapshot page (Student Admissions, Base Register NLD, BRON Snapshot Import, Import BRON Snapshot).

Import BRON Snapshot

Run Control ID: 1_NA

[Report Manager](#) [Process Monitor](#)

Run

Run Control Parameters

*Academic Institution:

PSUNV

PeopleSoft University

*BRINcode:

NL02

NLD Brincode 02

*Educational Sector:

Education

File Path:

n:\user\university\BRON\snapshot

File Name:

BRON Snapshot 1

Import BRON Snapshot page

BRINcode	Enter the BRINcode for which you want to import the snapshot file. Define BRINcode values on the BRON Setup page.
Educational Sector	Enter the educational sector for which you want to import the snapshot file.
File Path	Enter the file path where the snapshot file is located.
File Name	Enter the name of the snapshot file.

Comparing the BRON Snapshot

Access the BRON Compare Snapshot page (Student Admissions, Base Register NLD, BRON Snapshot Compare, BRON Compare Snapshot).

BRON Compare Snapshot

Run Control ID: 1_NA
[Report Manager](#)
[Process Monitor](#)
Run

Run Control Parameters

*Academic Institution:

PSUNV

PeopleSoft University

*BRINcode:

NL02

NLD Brincode 02

*Educational Sector:

Education

*Creation Date:

09/01/2003

31

Status Snapshot:

1st snapshot

☐ Rebuild Compare Table

BRON Compare Snapshot page

BRINcode	Enter the BRINcode for which you want to compare the snapshot file.
Educational Sector	Enter the educational sector for which you want to compare the snapshot file.
Creation Date	Enter the creation date. The creation date is part of the key in the snapshot file. On certain fixed dates, a snapshot file is sent to the institution. The creation date is part of the identification of the snapshot file. You must enter the creation date here so that the correct snapshot file can be selected for the comparison.
Status Snapshot	Enter a snapshot status. This is also part of the key in the snapshot file and is used for identification of the snapshot file. During different moments in time, several snapshot file types are sent to the institution. This status defines which snapshot file type is meant. For example, after a correction, a certain snapshot file, such as the 1 st snapshot, may be sent again to the institution. Because this snapshot file has a different creation date, the identification stays unique.
Rebuild Compare Table	Select to rebuild the entire compare table. Clear this check box to only produce a snapshot compare report. You would clear this check box when you have already created a compare table and only want to produce the snapshot compare report.

Chapter 29

Evaluating Applicants

After you have entered all the necessary information for an applicant, you are ready to evaluate the applicant and related application materials.

This chapter provides an overview of the evaluating applicants business process and discusses how to:

- Create general evaluations.
- Enter and update general evaluator ratings.
- Create application evaluations.
- Enter and update evaluator ratings for an application.

Understanding the Evaluating Applicants Business Process

This section lists prerequisites and discusses the evaluating applicants business process.

Prerequisites

Before you begin evaluating applicants, applications must be fully entered into your system. Depending on your office procedures, you will add evaluations at different times during the year. Although not all of the following information is required to run evaluations, the following list can serve as an overview of the relevant data that can be entered, and thus considered, for an application:

- Applicant demographics.
- Applicant address.
- Application program data.
- Application data.
- Application recruiting data.
- External education data.
- Test results.
- General materials.
- Application materials.

- Early financial aid offer information.

Evaluating Applicants Business Process

There are many ways you can use your system to evaluate applicants. Recruiting and Admissions provides SQR processes that enable you to automate much of your business process. You can also use Recruiting and Admissions to evaluate applicants manually. In fact, many combinations of manual and automated processes can work. Therefore, before evaluating applicants, decide how you want to use your system to evaluate applicants.

Regardless of whether you choose to evaluate applicants manually, through SQR processes, or through a combination of manual and automated processing, you must define rating schemes and the rating components that make up rating schemes. You must also define:

- Evaluation codes.
- Evaluation committees (if applicable to your evaluation business process).
- Evaluation status codes.

After you have set up the process for evaluating applicants, you are ready to perform the evaluations. This is where you have the most options regarding manual processing versus automatic processing. Performing applicant evaluations involves:

- Assigning evaluation codes to applicants.
- Linking materials (such as recommendations, essays, and portfolios) to applications.
- Assigning committees (which consist of the evaluators who physically evaluate the applicants).
- Entering evaluator ratings.
- Retrieving and evaluating objective ratings (such as test scores and GPA) from the applications.

After you have defined rating schemes, evaluation codes, committees, and evaluation statuses, you are ready to evaluate the applicants. Depending on the evaluation code/rating scheme structure that your institution uses, there are many ways to evaluate applicants. This book limits the discussion to the tools that you can use to fulfill your specific needs. These tools include:

- General evaluations and general evaluator ratings.
- Application evaluations and application evaluation ratings.
- An automated method for assigning evaluation components.
- An SQR process for linking application materials to applications.
- An SQR process for entering rating values.
- An SQR process for evaluating applicants based on rating values, and for updating application evaluation statuses.
- A COBOL process for calculating enrollment deposits.
- A COBOL process for activating applicants as students.

Use these tools to assign evaluation codes to applications, to enter and retrieve rating component values, to enter or have the system calculate overall rating values, to evaluate the applicant based on those overall rating values, and to update the applicant's program status.

Automatic Versus Manual Processing

The following table presents the steps that can be performed manually or automatically:

<i>Task</i>	<i>To execute automatically</i>	<i>To execute manually</i>
Assign evaluation codes.	Evaluation Code Assignment process ADEVALCD.SQR	General Evaluations component or Application Evaluations component.
Link application materials.	Application Materials Extract process ADMTEXT.SQR	Application Materials page.
Enter rating values for rating schemes and rating components.	For objective rating components: Evaluation Calculation process ADMTLRTG.SQR	For subjective rating components: General Evaluator Ratings component or Application Evaluator Ratings component.
Evaluate applicants based on rating values, and update application evaluation statuses.	Application Status Update ADMTLPGS.SQR	General Evaluations component or Application Evaluations component.
Calculate enrollment deposits.	When you update application evaluation statuses in batch: SFPBADEP (COBOL SQL)	Calculate Deposit Fees link on the Application Program Data page.
Activate applicants as students.	When you update application evaluation statuses in batch: ADPCPPRC (COBOL SQL)	Application Program Data page in the Application Maintenance component.

Your institution can rename the processes listed in the above table. You can also add to or edit the SQCs for the SQRs listed above. Check with your system administrator for more information about the specific SQRs and SQCs used by your institution.

General Versus Application Evaluations

To assign evaluation codes manually, you must create an evaluation for each applicant. There are two sets of components that you can use to create evaluations for an applicant.

- Use the General Evaluations and General Evaluator Ratings components to create *general* evaluations.

General evaluations are *not* tied to a career, program, or application number. Therefore, use general evaluations to evaluate applicants on general criteria that are not required by a particular career or program (such as a statement of purpose that the institution requires, regardless of the career or program the person is applying to). In addition, because general evaluations are not tied to application numbers, you can use general evaluations to evaluate individuals (such as prospects) without having to enter an application.

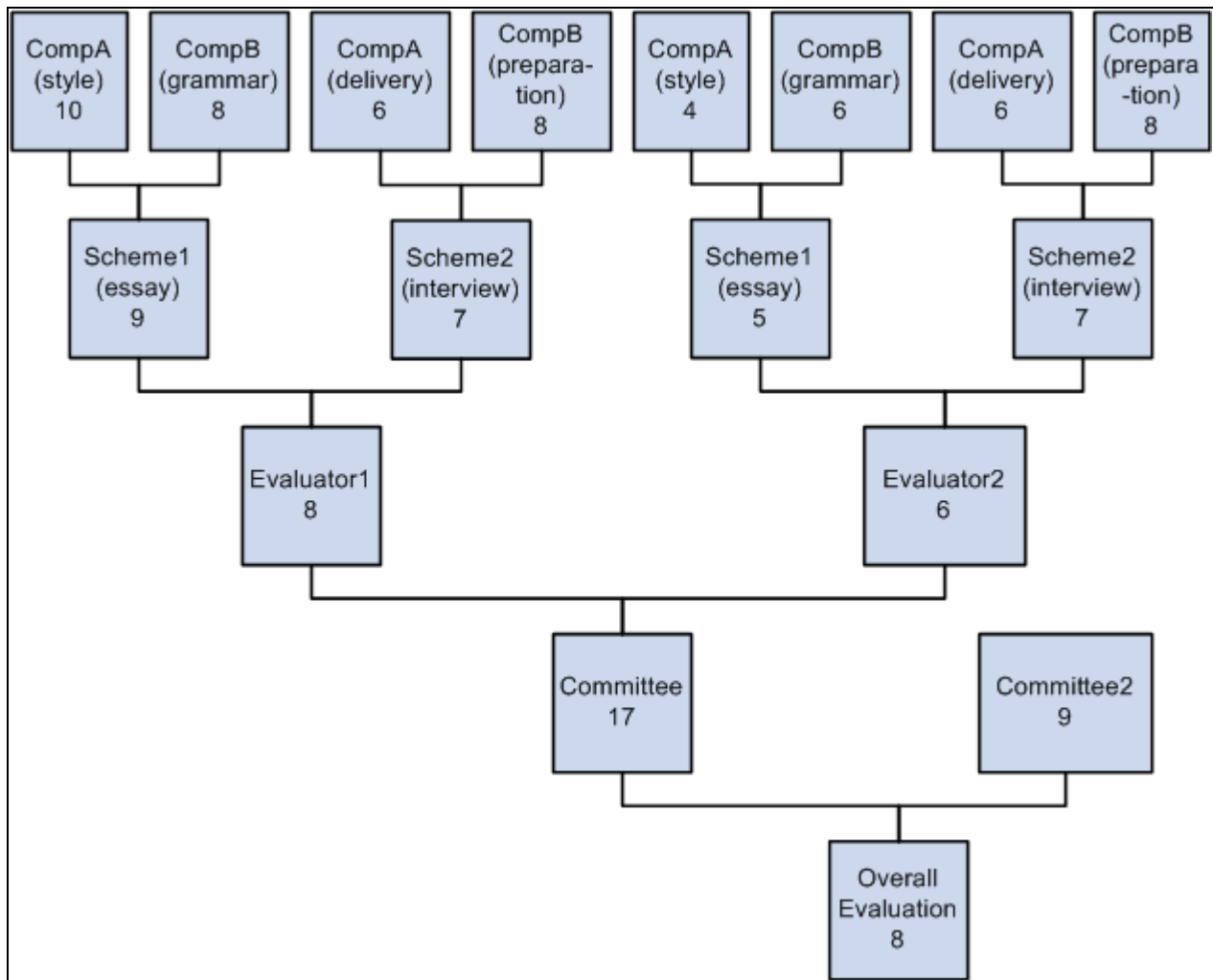
- Use the Application Evaluations and Application Evaluator Ratings components to create *application* evaluations.

Application evaluations are tied to a career, program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the career and program to which they are applying.

You can evaluate an applicant using both of these sets of components if you desire. You also use these components to enter ratings. You can enter the ratings manually, or you can use the Application Evaluation process to retrieve and evaluate objective scores, and then enter rating values. If you enter ratings manually, you use the Application Evaluator Ratings or the General Evaluator Ratings page. If the Application Evaluation process retrieves the ratings, they appear on the Overall Ratings page in the Application Evaluation component.

Understanding Automatic Overall Rating Calculation

Your Recruiting and Admissions application is equipped with a background process that averages evaluator ratings and overall ratings. Therefore, you only have to manually enter rating values at the rating component level. The system averages those ratings and populates overall ratings at the next higher level. The system continues to average overall ratings until you have an overall rating for the application. The following chart illustrates the hierarchical structure of this background process:



Illustrating the hierarchical structure

You must first enter rating component rating values. The system then calculates the overall rating value for the scheme. After all of the overall rating values for the scheme have been calculated, the system calculates the overall rating value for the evaluator, and the process continues hierarchically.

For example, suppose you assigned two committees to evaluate an applicant. One committee is to evaluate essays and interviews, and the second committee is to evaluate other materials (for simplicity we will not look at the details of the second committee). The first committee consists of two committee members (or evaluators). Each evaluator evaluates two schemes: the undergraduate essay and the undergraduate interview. The evaluators evaluate the style and grammar components of the undergraduate essay scheme, and they evaluate the delivery and preparation components of the undergraduate interview scheme.

1. First, the evaluator enters ratings for each *component* in each scheme.

In the example in the diagram above, the first evaluator entered 10 for style and 8 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. The second evaluator entered 4 for style and 6 for grammar for the essay, and 6 for delivery and 8 for preparation for the interview. For the system to calculate the averages, you must enter values at this level first.

2. When the evaluators saved the pages, the system calculates the averages for each *scheme* and populates the Overall Rating fields on the General Evaluator Rating page or the Application Evaluator Rating page, depending on the type of evaluation.

In our example, the overall rating for the first scheme for Evaluator1 is 9 (the average of 10 and 8), and the overall rating for the second scheme for Evaluator1 is 7 (the average of 6 and 8). The overall rating for the first scheme for Evaluator2 is 5 (the average of 4 and 6), and the overall rating for the second scheme for Evaluator2 is 7 (the average of 6 and 8).

3. After each scheme has an overall rating value, the system populates the overall rating for the *evaluator* (after you save the page) and populates the Overall Rating field on the Evaluator Ratings page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

In our example, the overall rating for Evaluator1 is 8 (the average of 9 and 7), and the overall rating for Evaluator2 is 6 (the average of 5 and 7).

4. After each evaluator has an overall rating value, the system populates the overall rating for the *committee* (after you save the page) and populates the Overall Rating field on the Evaluation Committee page in the General Evaluation or Application Evaluation components, depending on the type of evaluation.

In our example, the overall rating for Committee1 is 7 (the average of 8 and 6), and suppose that the overall rating for Committee2 is 9.

5. After each committee has an overall rating value, the system populates the overall rating for the application (after you save the page) and populates the Overall Rating field on the General Evaluation or Application Evaluation page, depending on the type of evaluation.

In our example, the overall rating for the application is 8 (the average of 7 and 9).

Remember that you must start at the first step. If you manually enter overall ratings for a scheme, for instance, without entering components, you will break the chain and the system will not calculate averages at any level. In other words, the system only calculates overall ratings at any given level if it had calculated the overall ratings at every level below that one.

Creating General Evaluations

This section discusses how to:

- Assign an evaluation code to a general evaluation.
- Link general materials to a general evaluation.
- Assign a committee to a general evaluation.
- Assign evaluators to a general evaluation.

Pages Used to Create General Evaluations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Evaluation	GENL_EVAL1	- Student Recruiting, Evaluate Prospects, General Evaluations - Student Recruiting, Evaluate Prospects, Student Admissions, Application Evaluation, General Evaluations	Assign evaluation codes and to enter high level, general information about a person. The evaluation code populates various fields in this component with default information (such as rating schemes and committees). You can also link general materials to an evaluation from this page.
Select General Materials	GENL_MATL_POPUP	Click the Link Materials link on the General Evaluation page.	Link general materials to a general evaluation.
View Assigned Materials	MATL_EVAL_POPUP	Click the appropriate Detail button on the Select General Materials page.	View details about a Material Type.
General Evaluation Committee	GENL_EVAL2	- Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluation Committee - Student Admissions, Application Evaluation, General Evaluations, General Evaluation Committee	Assign general evaluation committees to a general evaluation. The overall ratings of the committees you assign are also stored on this page.
General Evaluators	GENL_EVAL3	- Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluators - Student Admissions, Application Evaluation, General Evaluations, General Evaluators	Assign evaluators to a general evaluation, and to record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to a General Evaluation

Access the General Evaluation page (Student Recruiting, Evaluate Prospects, General Evaluations).

General Evaluation General Evaluation Committee General Evaluators

Sandra Kim AA0012

Find | View All First 1 of 1 Last

*Eval Code: UGINTERWW Undergraduate Interviews

*Eval Nbr: 1 [Link Materials](#)

Evaluation	Rating
Eval Stat: Committee Eval Dt: 10/07/2004 Comment:	Scheme: UGINTERWW Overall Rating:

Transfer To: General Materials Go

General Evaluation page

- Eval Code** (evaluation code) Select the evaluation code to be used to evaluate this person. Other fields on this page (such as Scheme) populate according to the evaluation code you select. This is where you assign evaluation codes to evaluations manually. Define evaluation codes on the Evaluation Table page.
- Eval Nbr** (evaluation number) The evaluation number default is 1 for the first general evaluation you enter, 2 for the second, and continues incrementally.
- Eval Stat** (evaluation status) Select the current evaluation status of this general evaluation. Define evaluation status codes on the Evaluation Status Table page.
- Eval Dt** (evaluation date) The default for the evaluation date is your system date.
- Scheme** Select the rating scheme you want to use for this general evaluation. If the evaluation code entered on this page is linked to a committee rating ID scheme, that scheme appears automatically. Define rating schemes on the Rating Scheme Table page.

Overall Rating

If you are using rating schemes, and if you entered all the evaluator ratings for every committee linked to this person, this value appears automatically. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each committee are stored on the General Evaluation Committee page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate prospects and applicants, you can enter an overall rating manually.

See [Chapter 29, "Evaluating Applicants," Evaluating Applicants Business Process, page 958.](#)

Note. This value does not include rating values that were retrieved and calculated by the Evaluation Calculation process.

Link Materials

Click this link to link general materials to this general evaluation. This link is available only after you save the page, provided there are general materials stored for this person. You can only choose from the general materials that are linked to this person. The Select General Materials Page appears.

View Materials

Click this link to view the general materials that are linked to this general evaluation. This link is available after you save the page, provided that you have linked materials to this general evaluation on the Select General Materials page. The View Assigned Materials Page appears.

Go

Click to go to another component.

Linking General Materials to a General Evaluation

Access the Select General Materials page (Click the Link Materials link on the General Evaluation page).

Select General Materials

Kim,Sandra D

ID: AA0012

Find | View All

First

1-2 of 2

Last

	Material Group	Material Type	Matl Nbr	Date Recvd	Dt Record	Type	
☐	Graduate Auditions	Audition	2	10/07/2004	10/07/2004	Drama	
☒	Graduate Recommendations	Recommendation	1	10/07/2004	10/07/2004		

Select General Materials page

Material Type

Select the material type that you want to link to this evaluation.

Assigning a Committee to a General Evaluation

Access the General Evaluation Committee page (Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluation Committee or Student Admissions, Application Evaluation, General Evaluations, General Evaluation Committee).

General EvaluationGeneral Evaluation CommitteeGeneral Evaluators

Sandra KimAA0012

Find | View AllFirst1 of 1Last

Eval Code:UGINTERVWUndergraduate Interviews

Eval Nbr:1

Find | View AllFirst1 of 1Last

Description:Undergraduate Interviews

*Committee:UGINWWUG Interview Committee

Evaluation Status:CommitteeEvaluation Date:10/07/2004

Overall Rating:

Comment:

Transfer To:General MaterialsGo

General Evaluation Committee page

Committee	The system populates the committee if the evaluation code for this general evaluation has an evaluation committee assigned to it. You can add committees. Note. To create general evaluations, you must assign an evaluation committee. However, an evaluation committee can be made up of only one person.
Evaluation Status	Select the evaluation status reflecting the current status of this committee's evaluation. Define evaluation status codes on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is the system date.

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Overall Rating

The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator in this committee assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applicants, you can enter an overall rating manually.

See Also

Chapter 29, "Evaluating Applicants," page 957

Assigning Evaluators to a General Evaluation

Access the General Evaluators page (Student Recruiting, Evaluate Prospects, General Evaluations, General Evaluators or Student Admissions, Application Evaluation, General Evaluations, General Evaluators).

General Evaluation General Evaluation Committee **General Evaluators**

Sandra Kim AA0012

Find | View All First 1 of 1 Last

Eval Code: UGINTERVW Undergraduate Interviews

Eval Nbr: 1

Find | View All First 1 of 1 Last

Committee: UGINVW UG Interview Committee

Find | View All First 1 of 2 Last

***Evaluator ID:** AD1040 Sullivan, Irving

Committee Role: MMBR Administrator of Committee

Evaluation Status: Committee **Evaluation Date:** 10/07/2004

Overall Rating: **Comment:**

Transfer To: General Materials Go

General Evaluators page

Evaluator ID	Enter an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the General Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.
	Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the General Evaluation Committee page.
Committee Role	Enter the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation. You set up evaluation status codes on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.
Overall Rating	The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the General Evaluator Rating page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applicants or prospects, you can enter an overall rating manually.

See Also

[Chapter 29, "Evaluating Applicants," Evaluating Applicants Business Process, page 958](#)

Entering and Updating General Evaluator Ratings

Use the General Evaluator Ratings component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applicants based on rating schemes.

This section discusses how to:

- Enter and update general evaluator overall ratings.
- Enter and update general evaluator ratings of rating components.

Pages Used to Enter and Update General Evaluator Ratings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Evaluator Rating	GENL_RATING1	- Student Recruiting, Evaluate Prospects, General Evaluator Rating - Student Admissions, Application Evaluation, General Evaluator Rating	Enter general evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.) You have to first set up an applicant evaluation based on an evaluation code in the General Evaluations component.
General Evaluator Detail	GENL_RATING2	- Student Recruiting, Evaluate Prospects, General Evaluator Rating, General Evaluator Detail - Student Admissions, Application Evaluation, General Evaluator Rating, General Evaluator Detail	Enter an evaluator's ratings of the components for a rating scheme. The system averages and displays the ratings entered here on the General Evaluator Rating page. You must first complete the General Evaluator Rating page.

Entering and Updating General Evaluator Overall Ratings

Access the General Evaluator Rating page (Student Recruiting, Evaluate Prospects, General Evaluator Rating or Student Admissions, Application Evaluation, General Evaluator Rating).

General Evaluator Rating

General Evaluator Detail

Sandra Kim

AA0012



Eval Code:

UGINTERWW

Undergraduate Interviews

Eval Nbr:

1

Committee:

UGINWW

UG Interview Committee

Find

View All

First

1 of 2

Last

Evaluator ID:

AD1040

Sullivan,Irving

Find

View All

First

1 of 1

Last

*Scheme:

UGINTERWW

 Undergraduate Interviews



Evaluation Status:

Committee

Evaluation Date:

10/07/2004



Overall Rating:

Comments:

Transfer To:

General Materials



Go

General Evaluator Rating page

- Scheme

The system populates the rating scheme according to the rating scheme entered on the General Evaluation page for this evaluation code and for this person. You can add more than one rating scheme for an evaluator.
- Evaluation Status

Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.
- Evaluation Date

The default for the evaluation date is your system date.
- Overall Rating

The system automatically calculates the overall rating based on the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the General Evaluator Detail page. You can override this calculation.

Entering and Updating General Evaluator Ratings of Rating Components

Access the General Evaluator Detail page (Student Recruiting, Evaluate Prospects, General Evaluator Rating, General Evaluator Detail or Student Admissions, Application Evaluation, General Evaluator Rating, General Evaluator Detail).

General Evaluator Rating		General Evaluator Detail	
Sandra Kim		AA0012	
Eval Code:	UGINTERWW Undergraduate Interviews		
Eval Nbr:	1		
Committee:	UGINWW UG Interview Committee		
Find View All First 1 of 2 Last			
Evaluator ID:	AD1040 Sullivan,Irving		
Find View All First 1 of 1 Last			
Scheme:	UGINTERWW Undergraduate Interviews		
Find View All First 1 of 3 Last			
*Component:	ACADP	Academic Potential	+ -
Type:	INDV	Individual	
Rating Value:	5	Excellent	
Comments:			
Transfer To:	General Materials		Go

General Evaluator Detail page

Component and Type

The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.

Rating Value

Enter a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the General Evaluator Rating page. You must enter ratings on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

Creating Application Evaluations

Use the Application Evaluations component to create *application* evaluations. Application evaluations are tied to an academic career, academic program, and application number. Therefore, use application evaluations to evaluate applicants on specific criteria for the academic career and program that they are applying to.

Use this component to record subjective rating values (such as a rating given by a committee) and objective rating values (such as a test score). If you are using the Automatic Evaluation process to retrieve objective rating values from applications, those rating values appear on the Overall Rating page in this component.

After creating the application evaluation, use the Application Evaluator Ratings component to enter actual evaluator rating values. However, if you are not using rating schemes, you can manually enter overall ratings in the General Evaluations component.

This section discusses how to:

- Assign an evaluation code to an application.
- Enter overall component ratings for an application.
- Assign a committee to an application evaluation.
- Assign evaluators to an application evaluation.

Pages Used to Create Application Evaluations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Evaluation	ADM_EVAL1	Student Admissions, Application Evaluation, Application Evaluation	Assign evaluation codes and to enter high level, general information about an applicant. The evaluation code populates various fields in this component with default information (such as rating schemes and committees).
Overall Rating	ADM_OVERALL_RATING	Student Admissions, Application Evaluation, Application Evaluation, Overall Rating	Manually enter or edit overall rating information for an application evaluation. The Overall Rating page stores objective overall rating information for an application evaluation. Rating values for a rating scheme's components are stored on this page for an application evaluation. Because it is unnecessary for each committee member to evaluate objective information (such as a test score), you can store objective rating values for each application in one place. You can enter the rating values manually, or you can use the Evaluation Calculation process to determine the values.

Page Name	Definition Name	Navigation	Usage
Committee Rating	ADM_EVAL2	Student Admissions, Application Evaluation, Application Evaluation, Committee Rating	Assign application evaluation committees to an application evaluation. The overall ratings of the committees you assign are also stored on this page.
Evaluator Rating	ADM_EVAL3	Student Admissions, Application Evaluation, Application Evaluation, Evaluator Rating	Assign evaluators to an application evaluation, and record overall ratings for each evaluator. The evaluators can be from a committee or you can choose any person in your database. The individual evaluators' overall ratings also appear on this page.

Assigning an Evaluation Code to an Application

Access the Application Evaluation page (Student Admissions, Application Evaluation, Application Evaluation).

Application Evaluation		Overall Rating	Committee Rating	Evaluator Rating
Kelly Harris		ID	AD9201	
Academic Career:	Undergraduate	Application Nbr:	00024159	
Prog Nbr:	0	Academic Program:	Liberal Arts Undergraduate	
Find View All First 1 of 1 Last				
*Evaluation Code:	UGAPPLFYR	UG Applicants		
*Evaluation Nbr:	1	☐ Recalculate Evaluation		
Evaluation		Rating		
Eval Stat:	Progress	Committee Rating ID:	UGCOMMFYR	
Eval Dt:	10/25/2004	Overall Rating ID:	ADMAVG	
Comment:				
Transfer To:	Application Evaluator Ratings	Go		

Application Evaluation page

Evaluation Code	Enter an evaluation code to be used to evaluate this applicant. Evaluation codes are set up on the Evaluation Table page. This is where you assign evaluation codes to evaluations manually. Evaluation codes can also be assigned automatically using the evaluation code assignment process. See Chapter 30, "Evaluating Applicants Using Automatic Processing," Assigning Evaluation Codes to Applications in Batch, page 982.
Evaluation Nbr (number)	The evaluation number automatically populates as 1 for the first application evaluation you enter, 2 for the second, and continues incrementally.
Eval Stat (evaluation status)	Select the evaluation status reflecting the current status of this application evaluation. Define evaluation status codes on the Evaluation Status Table page.
Eval Dt (evaluation date)	The default evaluation date is your system date. Edit the date.
Committee Rating ID	The committee rating ID automatically appears if the evaluation code was defined with a committee rating ID. A committee rating ID is a rating scheme with a type equal to <i>Committee</i> . Such schemes evaluate subjective information about an application. If you only want to evaluate objective data, select an overall rating ID only. You can change the committee rating ID.
Overall Rating ID	The overall rating ID automatically appears if the evaluation code was defined with an overall rating ID. An overall rating ID is a rating scheme with a type equal to <i>Overall</i> . Such rating schemes evaluate objective information about an application. If you only want to evaluate subjective data, enter a committee rating ID only. You can change the overall rating ID.
Recalculation Evaluation	The system selects this check box if application materials were linked to this application—either manually or through the application materials extract process (ADMTEXT.SQR)—after the application status update process processed this application. This tells the system that even though this application has already gone through the application status update process, it needs to go through it again.
Go	Click to go to another component.

Entering Overall Component Ratings for an Application

Access the Overall Rating page (Student Admissions, Application Evaluation, Application Evaluation, Overall Rating).

Application Evaluation		Overall Rating	Committee Rating	Evaluator Rating
Kelly Harris		ID	AD9201	
Academic Career:	Undergraduate	Application Nbr:	00024159	
Prog Nbr:	0	Academic Program:	Liberal Arts Undergraduate	
☐ New Course ☐ New Summary ☐ New General Material ☐ New Subject ☐ New Test Score ☐ Automatic Update Process				
Find View All First 1 of 1 Last				
Evaluation Code:	UGAPPLFYR	UG Applicants		
Evaluation Nbr:	1			
*Rating Component	Rating Value	Final Value	Evaluated	
AVG Admissions Average	0.0000	☒	☐	+ -
Transfer To: Application Evaluator Ratings Go				

Overall Rating page

New Course, New Subject, New Summary, New Test Score, and New General Material

If a new course, subject, academic summary, test score, or general material is added to this person's record, the system automatically selects their respective check boxes. These check boxes cannot be manually selected.

Automatic Update Process

The system selects this check box if one of the other choices in this group box is selected. When this check box is selected, it lets the automatic update process know that this application needs to be considered for processing when you run the application materials extract process. The system automatically sets these flags if a new transcript, test score, or general material is added for the employee ID.

Rating Component

The rating components of the rating scheme that you entered in the Overall Rating ID field on the Application Evaluation page appear. You can add new rating components.

Rating Value

If you are manually rating these components, enter the rating values for each component that you want to award this application. The Evaluation Calculation process will calculate these values if you are automatically rating these components.

Final Value

The system selects this check box if the rating component was defined as a final value component. Final value components are those that are required to be filled before the Evaluation Calculation process processes this application.

Evaluated

The system selects this check box if a rating component was evaluated through the Evaluation Calculation process. If you are manually evaluating this component, select this check box after evaluating the component.

Go

Click to go to another component.

Assigning a Committee to an Application Evaluation

Access the Committee Rating page (Student Admissions, Application Evaluation, Application Evaluation, Committee Rating).

Application EvaluationOverall RatingCommittee RatingEvaluator Rating

Kelly HarrisIDAD9201

Academic Career:Undergraduate

Application Nbr:00024159

Prog Nbr:0

Academic Program:Liberal Arts Undergraduate

Find | View AllFirst1 of 1Last

Evaluation Code:UGAPPLFYRUG Applicants

Evaluation Nbr:1

Find | View AllFirst1 of 1Last

*Committee:UGEV01UG Admissions Committee

Committee Type:UG Admissions Committee

Evaluation Status:

Evaluation Date:

Overall Rating:

Comment:

Transfer To:Application Evaluator RatingsGo

Committee Rating page

Committee

The system populates the committee if the evaluation code for this application evaluation has an evaluation committee assigned to it. You can add committees.

Committee Type

The type of the committee that you select appears.

Evaluation Status

Select the evaluation status reflecting the current status of this committee's evaluation. The evaluation code assignment process enters the evaluation status when you assign evaluation codes automatically. Define evaluation status codes on the Evaluation Status Table page.

Evaluation Date

The default for the evaluation date is the system date. The evaluation code assignment process enters the evaluation date when you assign evaluation codes automatically.

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Overall Rating

The system automatically calculates the overall rating for the entire committee by averaging the overall ratings entered for each evaluator assigned to this evaluation and scheme. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each evaluator are stored on the General Evaluators page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Go

Click to go to another component.

Assigning Evaluators to an Application Evaluation

Access the Evaluator Rating page (Student Admissions, Application Evaluation, Application Evaluation, Evaluator Rating).

Application Evaluation		Overall Rating		Committee Rating		Evaluator Rating	
Kelly Harris		ID		AD9201			
Academic Career: Undergraduate		Application Nbr:		00024159			
Prog Nbr: 0		Academic Program:		Liberal Arts Undergraduate			
Evaluation Code: UGAPPLFYR		UG Applicants		Find View All First 1 of 1 Last			
Evaluation Nbr: 1				Find View All First 1 of 1 Last			
Committee: UGEV01		UG Admissions Committee		Find View All First 1 of 2 Last			
*Evaluator ID: AD1040		Sullivan, Irving		+ -			
Committee Role: STAF		Staff member of Committee					
Evaluation Status:		Evaluation Date:					
Overall Rating:							
Comment:							
Transfer To: Application Evaluator Ratings		Go					

Evaluator Rating page

Evaluator ID

Enter an evaluator ID number. An evaluator can be any person in your database. If you entered a committee on the Application Evaluation Committee page, the evaluators on that committee will appear here. You can add and delete evaluators from those that appear.

Note. You cannot enter evaluators under an evaluation code unless you have first entered a committee on the Committee Rating page.

Committee Role	Enter the role that this evaluator plays on the committee. The person's role automatically appears if the committee member is already assigned a role.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation. Evaluation status codes are set up on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.
Overall Rating	The system automatically calculates the overall rating for the evaluator by averaging the overall ratings for each scheme that the evaluator evaluated. However, you must enter ratings at the lowest level first for this functionality to work. Overall ratings for each scheme (by evaluator) are stored on the Application Evaluator Rating page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings for an Application

Use the Application Evaluator Rating component to enter rating component values and overall ratings for evaluators. Only use this component if you are evaluating applications based on rating schemes.

This section discusses how to:

- Enter and update evaluator overall ratings for an application evaluation.
- Enter and update evaluator ratings of individual rating components.

Pages Used to Enter and Update Evaluator Ratings for an Application

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Evaluator Rating	ADM_RATING1	Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings	Enter evaluator rating information (such as the rating scheme, evaluation status, and the evaluator's overall rating.)
Application Evaluator Detail	ADM_RATING2	Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings, Application Evaluator Detail	Enter an evaluator's ratings of the components of a rating scheme. The system then averages and displays these ratings on the Application Evaluator Rating page.

Entering and Updating Evaluator Overall Ratings for an Application Evaluation

Access the Application Evaluator Rating page (Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings).

Application Evaluator Rating | **Application Evaluator Detail**

Janis Richards ID AD1008

Academic Career: Undergraduate **Application Nbr:** 00022603

Prog Nbr: 0 **Academic Program:** Liberal Arts Undergraduate

Evaluation Code: UG Appl **Evaluation Nbr:** 1

Committee: UG Admissions Committee

Find | View All First 1 of 2 Last

Evaluator ID: AD1040

Find | View All First 1 of 1 Last

***Scheme:** UGCOMMFYR UG Application Committee

Evaluation Status: Final **Evaluation Date:** 09/22/2000

Overall Rating: 3.67

Comments:

Transfer To: Application Evaluations Go

Application Evaluator Rating page

Scheme	The system populates the rating scheme according to the rating scheme entered on the Application Evaluation page for this evaluation code (for this person). You can add more than one rating scheme for an evaluator.
Evaluation Status	Select the evaluation status reflecting the current status of this evaluator's evaluation (for this scheme). Evaluation status codes are set up on the Evaluation Status Table page.
Evaluation Date	The default for the evaluation date is your system date.
Overall Rating	The system automatically calculates the overall rating by averaging the ratings for each rating component entered for this evaluator (and for this scheme). Ratings for each component (by evaluator) are stored on the Application Evaluator Detail page. You can override this calculation. Additionally, if you choose not to use rating schemes to evaluate applications, you can enter an overall rating manually.

Entering and Updating Evaluator Ratings of Individual Rating Components

Access the Application Evaluator Detail page (Student Admissions, Application Evaluation, Evaluate Application Materials, Application Evaluator Ratings, Application Evaluator Detail).

The screenshot displays the 'Application Evaluator Detail' page. At the top, there are two tabs: 'Application Evaluator Rating' and 'Application Evaluator Detail'. Below the tabs, the evaluator's name 'Janis Richards' and ID 'AD1008' are shown. Further down, application details are listed: 'Academic Career: Undergraduate', 'Application Nbr: 00022603', 'Prog Nbr: 0', 'Academic Program: Liberal Arts Undergraduate', 'Evaluation Code: UG Appl', 'Evaluation Nbr: 1', and 'Committee: UG Admissions Committee'. A navigation bar at the top of the nested table area includes 'Find | View All' and pagination 'First 1 of 2 Last'. The nested table itself has a header 'Evaluator ID: AD1040' and another navigation bar 'Find | View All First 1 of 1 Last'. The table contains one row with the following data: 'Scheme: UGCOMMFYR UG Application Committee', '*Component: ESSAY Essay(s)', 'Type: INDV Individual', 'Rating Value: 4 Good', and 'Comments:'. At the bottom of the page, there is a 'Transfer To:' dropdown menu set to 'Application Evaluations' and a 'Go' button.

Application Evaluator Detail page

Component and Type

The rating components and types linked to this rating scheme automatically appear. Edit or add new components and corresponding types.

Rating Value

Enter a rating value for each component in this rating scheme. If you set up rating values for the rating components for this rating scheme, you can prompt for those values. Define rating values on the Rating Components Table page.

When you save this page, the system averages the rating values for each component and populates the overall rating for the rating scheme (for this evaluator) on the Application Evaluator Rating page. You must enter ratings on *this* page first in order for the system to calculate overall ratings. This is the lowest level of the calculation.

Chapter 30

Evaluating Applicants Using Automatic Processing

This chapter provides an overview of evaluating applicants using automatic processing and discusses how to:

- Assign evaluation codes to applications in batch.
- Link application materials to applications in batch.
- Calculate rating values through an automatic process.
- Automatically update application program evaluation statuses.

Understanding How to Evaluate Applicants Using Automatic Processing

Recruiting and Admissions provides the following automatic processes to aid in evaluating applicants:

- Mass Change and the Assign Evaluation Codes process (ADEVALCD.SQR).

Assigns evaluation codes to applications in batch. Evaluation codes contain default data required for evaluating applicants (such as the rating scheme and evaluation status).

- Extract data for Adm Appl Matl (extract data for admissions application materials) process (ADMTLEXT.SQR).

Assigns application materials to applications in batch. Application materials are used to evaluate applications.

- Assign Adm Applicant Rating (assign admissions applicant rating) process (ADMTLRTG.SQR).

Retrieves objective scores (such as test scores) and evaluates them based on rules that you define in your own SQCs. Then, the process populates rating values on the Overall Rating page in the Application Evaluation component. Rating values are used to evaluate applicants.

- Program Stack Update process (ADMTLPGS.SQR).

Checks to see that all of the rating components have been entered, then sums all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values. Finally, updates the application evaluation status based on the rules in your SQCs.

- Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process (SFPBADEP).

Calculates enrollment deposits in batch on applications on which you've run the Program Stack Update process.

- Activate Applications process (ADPCPPRC).

Matriculates applicants in batch who were evaluated using the Program Stack Update process.

Note. PeopleSoft delivers sample SQRs to help you with a variety of tasks. However, your institution can modify these SQRs to fit their specific needs. For this reason, your SQRs might be named differently, and they might behave slightly differently than described.

See Also

Chapter 29, "Evaluating Applicants," page 957

Assigning Evaluation Codes to Applications in Batch

Before you can run the application materials extract process or an evaluation calculation for a group of applications, you must assign them an evaluation code. Evaluation codes contain important default information and helps with selecting the appropriate group for extract and evaluation processing.

First you must select the applications that you want to assign the evaluation codes to. Use the Mass Change feature to do this. Then run the Assign Evaluation Codes process to assign the evaluation codes to the applications that the mass change process selected.

To access the Mass Change Definition component, select Student Admissions, Processing Applications, Mass Change, Mass Change Definition.

See *PeopleTools PeopleBook: Data Management*

To assign evaluation codes with mass change:

1. Select the appropriate mass change definition to define which applications need to be assigned which evaluation code.

Use the Mass Change Definition - Description page to enter the mass change definition that defines the criteria by which you select applications. The delivered mass change definition for assigning evaluation codes is *Evaluation Assignment Select*. However, your institution can define its own mass change definition for assigning evaluation codes, but use the delivered mass change definition as a template.

2. Enter criteria for determining which applications to assign the evaluation code, and enter the evaluation code you want assigned to those applications.

Use the Criteria and Defaults page to enter criteria for determining which applications to assign the evaluation code, and to enter the evaluation code you want assigned to those applications.

The first execution sequence of the SQL statement in the delivered mass change definition is *Delete Tmp5 Table*. This program clears the temporary table that stores the records of those applications selected the last time you ran this process.

The second execution sequence of the SQL statement in the delivered mass change definition is *Select Applicant Criteria*. The following page shot shows an example of the criteria that can be used in the selection process.

Mass Change Definition: Application Prog Update Select

SQL Statement Find | View All First 1 of 1 Last

Execution Seq: 1 **Description:** Select Applicant Criteria

Criteria Find | View All First 1-2 of 20 Last

Field	Field Value
Academic Level Equal To	10
Academic Career Equal To	UGRD

Defaults Customize | Find | View All First 1-2 of 2 Last

Field Label	Mass Change Field Value
1 Program Action	COND
2 Action Reason	TEST

Criteria and Defaults page

Use the Criteria group box to enter the criteria by which the mass change process will select applications to assign the evaluation code you select. In the delivered Evaluation Assignment Select mass change definition, there are 27 fields you can use to select applicants (such as academic level, academic career, program status, recruiter ID, and many others). In our example in the previous page shot, the applicant must have an academic level of 10 and must be an undergraduate. However, there could be many more fields selected as search criteria in subsequent rows.

Use the Defaults group box to select the evaluation code that you want the mass change process to assign to the applications that you selected. In the example in the previous page shot, the evaluation code the mass change process will assign is *UGAPPLFYR* (first year undergraduate applicants).

1. Generate the SQL for this mass change definition.

Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition.

Remember to click the Clear SQL button if an SQL statement already exists in the text box.

2. Set up a mass change group to define in what order you want the mass change definitions to run.

Use the Mass Change Group component to set up mass change groups. To access the Mass Change Group component select Student Admissions, Processing Applications, Mass Change, Mass Change Group. Create a mass change group to group the steps that it takes to process the applications you selected. Create a group by entering related mass change definitions that you must run to complete a particular task (such as assigning evaluation codes), and the order in which they should be run.

On the Mass Change Group page, select SA (student administration) in the PS Owner field.

Next, select the mass change definitions. In the previous example, you would run the *Evaluation Assignment Select* mass change definition first. This definition selects all the records chosen by the SQL statement that you generated earlier. Second, you would run the *Evaluation Duplicate Check* mass change definition, which removes any applicants who matched your selection criteria, but were already assigned the evaluation code.

3. Process the mass change group to select the applications to be assigned the evaluation code.

Use the Run Mass Change page to execute the mass change definitions in the mass change group. The mass change definitions in this group choose your final list of applications that should be assigned a code during the evaluation code assignment process. To access this page select Student Admissions, Processing Applications, Mass Change, Run Mass Change.

On the Run Mass Change page, select the Execute Mass Change Group option. Then select the mass change group ID that you defined on the Mass Change Group page.

4. Run the Evaluation Code Assignment process (discussed in the following section).

Page Used to Assign Evaluation Codes to Applications in Batch

Page Name	Definition Name	Navigation	Usage
Evaluation Code Assignment	RUNCTL_EVALCODE	Student Admissions, Processing Applications, Evaluations, Assign Evaluation Codes	Assign the evaluation code to the applications that you selected through the mass change process. Note. PeopleSoft delivers a sample SQR for assigning evaluation codes, ADEVALCD.SQR. Your institution can modify this SQR to fit its specific needs.

Running the Evaluation Code Assignment Process

Access the Evaluation Code Assignment page (Student Admissions, Processing Applications, Evaluations, Assign Evaluation Codes).

Assign Evaluation Codes

Run Control ID: Alerts [Report Manager](#) [Process Monitor](#) Run

*Academic Institution:  PeopleSoft University

Program Evaluation Status

*Evaluation Status: 

*Evaluation Date: 

Evaluation Code Status

*Evaluation Status: 

*Evaluation Date: 

Committee Evaluation Status

*Evaluation Status: 

*Evaluation Date: 

Assign Evaluation Codes page

Program Evaluation Status

**Evaluation Status and
Evaluation Date**

Enter the evaluation status and date that you want entered on the Evaluation subpage of the Application Program Data page. Define evaluation statuses on the Evaluation Status Table page.

Evaluation Code Status

**Evaluation Status and
Evaluation Date**

Enter the evaluation status and date that you want entered on the Application Evaluation page. Define evaluation statuses on the Evaluation Status Table page.

Committee Evaluation Status

**Evaluation Status and
Evaluation Date**

Enter the evaluation status and date that you want entered on the Committee Rating and Evaluator Rating pages. Define evaluation statuses on the Evaluation Status Table page.

Click the Run button to run the Assign Evaluation Codes process at user-defined intervals.

Linking Application Materials to Applications in Batch

This section discusses how to link application materials to applications in batch.

Page Used to Link Application Materials to Applications in Batch

Page Name	Definition Name	Navigation	Usage
Application Materials Extract	RUNCTL_APPEVAL1	Student Admissions, Processing Applications, Evaluations, Application Materials Extract	Assign application materials to applications in batch. Application materials are used to evaluate applicants. Note. PeopleSoft delivers a sample SQR for extracting application materials, ADMTLEXT. Your institution can add to or edit the SQCs for this SQR.

Linking Application Materials to Applications in Batch

For an application to be considered during the application materials extract process, the application must have an evaluation code assigned on the Application Evaluation page, and the Automatic Update Process check box must be selected on the Overall Rating page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, which must have material extract SQCs defined for it. The Application Materials Extract process uses those SQCs to assign the appropriate materials to the selected applications. Define rating schemes and their material extracts on the Rating Scheme Table page.

Evaluation Code	Select an evaluation code. The process only extracts application materials for applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.
Admit Term	Select an admit term. The process only extracts application materials for applications with the admit term that you select. Define admit terms on the Term Values Table page.
Evaluation Status	Select an evaluation status. The process only extracts application materials for applications with the evaluation status that you select. The process looks at the Evaluation Status field on the Application Program Data page.
Institution	Select an Academic Institution. The process only extracts application materials for applications for the institution you select.

Click the Run button to run the Extract data for Adm Appl Matl (extract data for admissions application materials) process at user-defined intervals.

To view the results of this extract process, use the Application Materials Summary pages under Student Admissions, Applicant Summaries.

Calculating Rating Values Through an Automatic Process

The section discusses how to calculate rating values through an automatic process.

Page Used to Calculate Rating Values Through an Automatic Process

Page Name	Definition Name	Navigation	Usage
Evaluation Calculation	RUNCTL_APPEVAL2	Student Admissions, Processing Applications, Evaluations, Evaluation Calculation	Run the evaluation calculation.

Calculating Rating Values Through an Automatic Process

Access the Evaluation Calculation page (Student Admissions, Processing Applications, Evaluations, Evaluation Calculation).

Evaluation Calculation

Run Control ID: Alerts [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PeopleSoft University

*Evaluation Code: UG Applicants

*Admit Term: 2005 Fall

Update Evaluation Code Status

From: Committee Eval In Progress

To: Final

Evaluation Calculation page

The application must first be assigned an evaluation code on the Application Evaluation page. In addition, the evaluation code you are using must include a rating scheme that has a type of *Overall*, and the rating scheme must have rating components assigned to it. Each rating component in the rating scheme has a defined sequence and formula ID. The formula ID defines which SQC should be run for the rating component. The evaluation calculation looks to those components to come up with rating values that will be inserted on the Overall Rating page for the application. Application materials must have been assigned manually or automatically.

The Evaluation Calculation process looks for applications that meet the criteria you enter here which have never been calculated or which were previously calculated, but have had materials linked to the application after the last calculation was run. If new materials have been added since the last calculation, the system selects the Recalculate Evaluation check box on the Application Evaluation page.

When the Evaluation Calculation process finds an application that meets its criteria, it retrieves the values that your SQCs tell it to retrieve, evaluates the values based on the rules in your SQC, and populates the result on the Overall Rating page in the Application Evaluation component. For example, suppose you determine that an SAT score of over 1450 is worth a rating value of 10. Suppose further that you run the process and it retrieves an SAT score of 1462. The process would evaluate based on your rules and populate the rating value 10 in the Rating Value field for the test score component.

Note. PeopleSoft delivers a sample SQR for evaluating applications, ADMTLRTG. Your institution must define its own SQCs for this SQR, which define the rules by which applications should be evaluated.

Evaluation Code	Select an evaluation code. The process only evaluates applications that have been assigned the evaluation code you select. Define evaluation codes on the Evaluation Table page.
Admit Term	Enter an admit term. The process only evaluates applications that have the admit term you select. Define admit terms on the Term Values Table page.
Institution	Enter an institution. The process only evaluates applications for this institution.
From	The process only evaluates applications that have the evaluation status you select. This is the evaluation status listed on the Application Evaluation page.
To	Enter the evaluation status that you want the process to <i>add</i> to the application evaluations.

Click the Run button to run the Assign Adm Applicant Rating (assign admissions applicant rating) process at user-defined intervals.

Automatically Updating Application Program Evaluation Statuses

Use the Application Status Update process to automatically update the program evaluation status of multiple applications.

This process looks to the parameters you define to choose the applications to be considered for the status update. The program looks to the Overall Rating page to verify that all rating components designated as final value have been evaluated. The program then determines if any of these applications have a future dated row on the Application Program Data page. Any records with a future dated row are *not* included in this process.

The next step in the process is to sum all of the final value components on the Overall Rating page for an application. An SQC defined by your institution determines the status of the application according to the sum of the final values.

For each application evaluated, the Application Program Data page is updated as follows:

- The process updates the program evaluation status.
- The process inserts a new program data row with an effective date equal to your system date, or, if the most recent row has the same effective date as the current date, the sequence number is incremented.

The new row contains the same data as the previous row, with the following exceptions: program action, action date and program status, which the process updates. The action reason is also updated if you have defined for it to do so in your SQC.

The values the process inserts are determined by the rules of the SQCs that your institution defines.

When you update application program data via the Application Status Update process, you're unable to manually calculate enrollment deposits or activate applicants as students. Therefore, you must calculate enrollment deposits and activate applicants as students via two COBOL processes: the Calculate Deposits process and the Activating Applications process.

This section discusses how to:

- Updating application program evaluation status using the Program Stack Update process.
- Calculating enrollment deposits using the Deposit Fees Calc (Batch) process.
- Activating applicants as students using the Activate Applications process.

Pages Used to Automatically Update Application Program Evaluation Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Status Update	RUNCTL_EVALSTATUS	Student Admissions, Processing Applications, Update Applications, Application Status Update	Perform a background process to update the program evaluation status and program actions of applications that have been evaluated. See Chapter 30, "Evaluating Applicants Using Automatic Processing," page 981. Note. PeopleSoft delivers a sample SQR, ADMTLPGS.SQR. Your institution can add to or edit the SQCs for this SQR.
Calculate Deposits	RUNCTL_SFPBADEP	Student Admissions, Application Fees and Deposits, App Deposit Fees Process	Calculate enrollment deposits for applicants who were admitted via the Application Status Update process. You must calculate an enrollment deposit before activating the applicant as a student if you have a deposit fee code assigned to your application center (on the Application Center Table page). You must first admit applicants through the Program Stack Update process.

Page Name	Definition Name	Navigation	Usage
Activate Application	RUNCTL_AD_SR	Student Admissions, Processing Applications, Update Applications, Activate Applicants	Activate applicants as students. This process inserts a program action of Matriculate (MATR) on the Application Program Data page and creates the student program and plan records. Use the Activate Applications process if you admitted an applicant through the Program Stack Update process, and therefore could not manually matriculate the applicant. If your institution requires an enrollment deposit prior to matriculation, you must calculate a deposit prior to running this process.

Updating Application Program Evaluation Status Using the Program Stack Update Process

Access the Application Status Update page (Student Admissions, Processing Applications, Update Applications, Application Status Update).

Application Status Update

Run Control ID: Alerts [Report Manager](#) [Process Monitor](#) Run

*Academic Institution: PSUNV PeopleSoft University

*Evaluation Code: UGAPPLFYR UG Applicants

*Academic Career: UGRD Undergraduate

*Academic Program: LAU Liberal Arts Undergraduate

*Admit Type: FYR First-Year

*Admit Term: 0550 2005 Fall

*Action Date: 10/01/2004

Update Program Eval Status

From: IP To: FN

Application Status Update page

Evaluation Code	Enter an evaluation code. The process only processes the applications that have the evaluation code that you select. Define evaluation codes on the Evaluation Table page.
Academic Career	Enter an academic career. The process only processes the applications that have the academic career that you select. This is the academic career to which that the applicant is applying.
Academic Program	Enter an academic program. The process only processes the applications that have the academic program that you select.
Admit Type	Enter an admit type. The process only processes applications that have the admit type that you select. Define admit types on the Admit Type Table.
Admit Term	Enter an admit term. The process only processes the applications that have the admit term that you select. Define admit terms on the Term Values Table page.
Action Date	The default for the action date is your system date. Edit this date to reflect the date you want to appear as the action date on the Application Program Data page.
From	The process only process applications that have the evaluation status you select.
To	Enter the program evaluation status that you want the process to <i>add</i> to the applications on the Application Program Data page.

Click the Run button to run the Program Stack Update process at user-defined intervals.

To view the results of this application program evaluation status update process, you can use the Applicant Progression page, or you can go to an individual's Application Program Data page in the Application Maintenance component.

Calculating Enrollment Deposits Using the Deposit Fees Calc (Batch) Process

Access the Calculate Deposits page (Student Admissions, Application Fees and Deposits, App Deposit Fees Process).

Calculate Deposits

Run Control ID: MARJO [Report Manager](#) [Process Monitor](#) [Run](#)

Parameters

Batch ID: 999999999999

*Institution: PSUNV PeopleSoft University

*Academic Career	Admit Term	Admit Type
UGRD Undergrad	0550 2005 Fall	FYR First-Year

[Display Deposit Fees](#)

Calculate Deposits page

- Academic Career** Enter an academic career. The process only calculates enrollment deposits for applications that have the academic career that you select.
- Admit Term** Enter an admit term. The process only calculates enrollment deposits for applications that have the admit term that you select. Define admit terms on the Term Values Table page.
- Admit Type** Enter an admit type. The process only calculates enrollment deposits for applications that have the admit type that you select. Define admit types on the Admit Type Table page.

You can add additional rows as needed for selecting additional careers, admit terms etc. to calculate deposits for multiple groups of applicants. Click the Run button to run the Deposit Fees Calc (Batch) [deposit fees calculation (batch)] process at user-defined intervals.

To view the results of the Deposit Fees Calc (Batch) process for an applicant, use the Customer Accounts page in the PeopleSoft Student Financials application.

Activating Applicants as Students Using the Activate Applications Process

Access the Activate Application page (Student Admissions, Processing Applications, Update Applications, Activate Applicants).

Activate Applicants

Run Control ID: MARJO

[Report Manager](#) [Process Monitor](#)

Run

Find | View All First 1 of 1 Last

Institution	*Career	Acad Prog	Admit Term	Admit Type	*As Of Date
PSUNV	UGRD	LAU	0550	FYR First-Year	10/26/2004

Activate Applicants page

Note. Admissions application records use the Last Admit Term to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Career	Enter an academic career. The process only matriculates applicants who have the academic career that you select.
Acad Program (academic program)	Enter an academic program. The process only matriculates applicants who have the academic program that you select.
Admit Term	Enter an admit term. The process only matriculates applicants who have the admit term that you select. Define admit terms on the Term Values Table page.
Admit Type	Enter an admit type. The process only matriculates applicants who have the admit type that you select. Define admit types on the Admit Type Table page.
As of Date	The default for the as of date is your system date. This is the date you ran this process.

Add additional rows as needed to define additional selection criteria. Click the Run button to run the Activate Applications process at user-defined intervals.

Chapter 31

Viewing Application Evaluation Summaries and Progression

This chapter discusses how to:

- View application evaluation summaries.
- View a summary of an applicant's progression.

Viewing Application Evaluation Summaries

Use the Application Evaluation Summary pages to view the status of application evaluations.

This section discusses how to:

- View overall results of an application evaluation.
- View committee results of an application evaluation.
- View evaluator results of an application evaluation.
- View evaluator detail summary information for an application evaluation.

Pages Used to View Application Evaluation Summaries

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Overall Results	ADM_EVAL_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary	Look up overall results of an application evaluation for an applicant. You must first complete the application evaluation for this person.
Committee Results	ADM_EVAL_COMM_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Committee Results	Look up results of committee application evaluations for an applicant.

Page Name	Definition Name	Navigation	Usage
Evaluator Results	ADM_EVALUATOR_SUMM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Results	Look up results of evaluators' evaluations of an application.
Evaluator Detail	ADM_EVAL_DTL_SUM	Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Detail	Look up results of the details of evaluators' evaluations of an application. You must first complete the application evaluation for this person.

Viewing Overall Results of an Application Evaluation

Access the Overall Results page (Student Admissions, Applicant Summaries, Application Evaluation Summary, Overall Results).

Overall Results		Committee Results	Evaluator Results	Evaluator Detail				
Dario Miselli		ID	AD6999					
Academic Career: Undergraduate		Application Nbr:	00024160					
Prog Nbr: 0		Academic Program:	Liberal Arts Undergraduate					
Search On Component: Evaluation Code: Search Final Value: Eval Stat:				Sort By ☒ Component ☐ Final Value ☐ Method ☐ Rating Value				
Evaluation Code	Nbr	Eval Stat	Date	Scheme	Component	Value	Final	Method
UG Applicants	1	Final	10/01/2004	UG App Com	Overall	93.3500	☒	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Acad Perf	5.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High ACT		☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Curriculum	5.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	High SAT I	1400.0000	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Subjective	3.6700	☐	Automatic
UG Applicants	1	Final	10/01/2004	UG App Com	Testing	5.0000	☐	Automatic

Overall Results page

Component

Enter a rating component If you want to view summary information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.

Final Value	Select <i>Yes</i> if you want to view summary information for final value components only. Select <i>No</i> if you do not want to view only final value components.
Evaluation Code	Enter an evaluation code if you want to view summary information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
Eval Stat (evaluation status)	Select an evaluation status if you want to view summary information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Application Evaluation page.
Sort By	Select whether you want to view the results by Component, Final Value, Evaluation Method, or Rating Value.
Search	Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Committee Results of an Application Evaluation

Access the Committee Results page (Student Admissions, Applicant Summaries, Application Evaluation Summary, Committee Results).

Overall Results		Committee Results		Evaluator Results		Evaluator Detail	
Dario Miselli		ID		AD6999			
Academic Career:		Undergraduate		Application Nbr:		00024160	
Prog Nbr:		0		Academic Program:		Liberal Arts Undergraduate	
Search On Committee: Evaluation Code: Eval Stat: Search Sort By ☒ Committee ☐ Rating ☐ Eval Stat							
Committee	Eval Code	Nbr	Eval Stat	Date	Ovr Rating		
UG Admissions Committee	UG Applicants	1	Final	10/01/2004	3.67		

Committee Results page

Committee	Enter an evaluation committee If you want to view committee information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.
Evaluation Code	Enter an evaluation code if you want to view committee information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

- Eval Stat (evaluation status)

Select an evaluation status if you want to view committee information by this criterion. When you click the Search button the system retrieves overall result information for those evaluations that have matching evaluation statuses that on the Committee Evaluation page.
- Committee, Rating, and Eval Stat (evaluation status)

Select whether you want to view the results of your summary information by committee, rating, or evaluation status.
- Search

Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Results of an Application Evaluation

Access the Evaluator Results page (Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Results).

Overall Results

Committee Results

Evaluator Results

Evaluator Detail

Dario Miselli

ID

AD6999

Academic Career: Undergraduate

Application Nbr: 00024160

Prog Nbr: 0

Academic Program: Liberal Arts Undergraduate

Search On

Committee:

Evaluation Code:

Evaluator:

Eval Stat:

Search

Sort By

☒ Committee

☐ Evaluator

☐ Rating

☐ Eval Stat

Evaluator Name	Committee	Evaluation Code	Nbr	Eval Stat	Date	Ovr Rating
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67
Dern,Bill	UG Admissions Committee	UG Applicants	1	Progress	10/01/2004	3.67

Evaluator Results page

- Committee

Enter an evaluation committee If you want to view evaluator result information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.
- Evaluation Code

Enter an evaluation code if you want to view evaluator result information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.
- Evaluator

Enter an evaluator if you want to view evaluator result information for a specific evaluator.

- Eval Stat** (evaluation status) Select an evaluation status if you want to view evaluator result information by this criterion. When you click the Search button the system retrieves evaluator result information for those evaluations that have matching evaluation statuses on the Evaluator Rating page.
- Committee, EvaluatorRating, and Eval Stat** (evaluation status) Select whether you want to view the results of your summary information by committee, evaluator, rating, or evaluation status.
- Search** Click this button to bring up the summary information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing Evaluator Detail Summary Information for an Application Evaluation

Access the Evaluator Detail page (Student Admissions, Applicant Summaries, Application Evaluation Summary, Evaluator Detail).

Overall Results		Committee Results		Evaluator Results		Evaluator Detail	
Dario Miselli		ID		AD6999			
Academic Career: Undergraduate		Application Nbr: 00024160					
Prog Nbr: 0		Academic Program: Liberal Arts Undergraduate					
Search On Committee: Evaluation Code: Search Component: Evaluator:						Sort By ☒ Committee ☐ Component ☐ Evaluator ☐ Rating Value	
Evaluator Name	Committee	Evaluation Code	Nbr	Scheme	Component	Value	
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	5	
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	3	
Sullivan,Irving	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3	
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Essay(s)	4	
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Extra Acti	4	
Dern,Bill	UG Admissions Committee	UG Applicants	1	UG App Com	Recommend	3	

Evaluator Detail page

- Committee** Enter an evaluation committee If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those committees assigned to this application.
- Evaluation Code** Enter an evaluation code if you want to view evaluator detail information based on this criterion. When you click the Search button the system retrieves only those evaluation codes assigned to this application.

Component	Enter a rating component If you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves only those components assigned to this application.
Eval Stat (evaluation status)	Enter an evaluation status if you want to view evaluator detail information by this criterion. When you click the Search button the system retrieves evaluator detail information for those evaluations that have matching evaluation statuses on the Application Evaluator Detail page.
Committee, Component, Evaluator, and Rating Value	Select whether you want to view the results of your summary information by committee, component, evaluator or rating value.
Search	Click this button to bring up the evaluator detail information matching your search criteria. If information is found, it displays in the bottom portion of the page.

Viewing a Summary of an Applicant's Progression

This section discusses how to view a summary of an applicant's progression.

Page Used to View a Summary of an Applicant's Progression

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Applicant Progression	APPL_PROGRESS_SUMM	Student Admissions, Applicant Summaries, Applicant Progression	View a summary of an applicant's progression through the recruiting and admissions business process. Summary data (such as status and program action) can be viewed for the person as a prospect, applicant, and student. You can also view any file attachments submitted by the applicant. Individuals must have an application in your database for you to be able to view their progression.

Chapter 32

(NLD) Managing BPV Internship Agreements

Students pursuing vocational education receive theoretical as well as practical education. As part of their practical training students participate in internships at external organizations. These internships are known as vocational training, or BPV. The BPV agreement between the student, the external organization, and the institution is laid out in a contract which must be printed and signed by various persons.

Once you have completed setup for BPV agreements, you must define the external organizations, their locations, and contacts at the organizations.

This chapter discusses how to:

- Set up BPV internship agreements.
- Define BPV organization locations.
- Set up BPV contracts.
- Create internship contracts.
- Add students to contracts.
- Add contracts to students.
- Print BPV contracts.
- Enter contract details and signature dates.

Setting Up BPV Internship Agreements

To set up BPV internship agreements, use the Organization Type component (SAD_BPV_OTP_NLD), Address Types component (SAD_ADDRESS_TP_NLD), Campus Telephone component (SAD_CAMPUS_TEL_NLD), BPV Appendix component (SAD_BPV_NBL_NLD), and the BPV User Settings component (SAD_BPV_OID_NLD).

This section discusses how to:

- Set up BPV user security.
- Define role user with BPV administrator rights.

Pages Used to Set Up BPV Internship Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
BPV Organization Type	SAD_BPV_OTP_NLD	Student Admissions, Internship Contracts NLD, Organization Types, BPV Organization Type	Define organization types by academic organization. You can only enter types for organizations for which you have access. Organization types are used to classify organization locations on the BPV Organization Locations page.
Address Types	SAD_ADDRESS_TP_NLD	Student Admissions, Internship Contracts NLD, Address Types, Address Types	Define address and phone types for organizations. Specify address types for organizations on the Location Detail page and specify phone types on the BPV Organization Phones page.
BPV Campus Telephone	SAD_CAMPUS_TEL_NLD	Student Admissions, Internship Contracts NLD, Campus Telephone Numbers, BPV Campus Telephone	Define campus telephone numbers. Campus telephone numbers are printed on top of the BPV contract.
BPV Appendix	SAD_BPV_NBL_NLD	Student Admissions, Internship Contracts NLD, BPV Appendix, BPV Appendix	Create standard appendix texts that can be linked to BPVOs. The standard texts must be secured by academic organization security and must be set up per CREBO code. Link appendix text to contracts on the BPV Appendix page.
BPV User Settings	SAD_BPV_OID_NLD	Student Admissions, Internship Contracts NLD, BPV User Settings, BPV User Settings	Set up BPV user security to allow users to work with BPV contract functionality.
BPV Set-up	SAD_BPV_INST_NLD	Student Admissions, Internship Contracts NLD, BPV Set-up, BPV Set-up	Define a role user with BPV administrator rights and set up last contract number assigned

Setting Up BPV User Security

Access the BPV User Settings page (Student Admissions, Internship Contracts NLD, BPV User Settings, BPV User Settings).

BPV User Settings

User ID:

HBN

KU0023

Finnes,Richie

☐ BBL Match

☒ BOL match

BPV User Settings page

- BBL Match**

Select this check box if this user can link students in the BBL career only to a contract with the same CREBO. Clear this check box if the user can link students in the BBL career to contracts regardless of CREBO.
- BOL Match**

Select this check box if this user can link students in the BOL career only to a contract with the same CREBO. Clear this check box if the user can link students in the BOL career to contracts regardless of CREBO.

Defining Role User with BPV Administrator Rights

Access the BPV Set-up page (Student Admissions, Internship Contracts NLD, BPV Set-up, BPV Set-up).

BPV Set-up

Assign Roleuser with BPV Creation Date Edit Permissions & administer Last BPV Assigned Contract Number

'Role User:

CS - Administrator

Last Contract Number Assigned:

10002

BPV Set-up page

- Role User**

Select a role user that should have BPV Administrator rights. The BPV Administrator can change the student career number value and BPV creation date on BPV Contracts.
- Last Contract Number Assigned**

Use this field to maintain the last BPV contract number assigned.

Defining BPV Organization Locations

This section discusses how to:

- Define BPV organization locations.
- Review or update BPV organization locations.
- Define accreditation information for BPV organizations.

Pages Used to Define BPV Organization Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Location Detail	ORG_LOCATIONS	• Student Admissions, Internship Contracts NLD, Organization Locations, Location Detail • Campus Community, Organization, Create/Maintain Organization, Organization Locations, Location Detail	Add a BPV organization location.
BPV Organization Locations	SAD_BPV_OLC_NLD	• Student Admissions, Internship Contracts NLD, BPV Locations, BPV Organization Locations • Click the Edit BPV Location Address link on the Location Detail Page.	Review or update the locations for BPV organizations that you added on the Location Details page.
BPV Accreditation	SAD_BPV_ACC_NLD	Student Admissions, Internship Contracts NLD, BPV Locations, BPV Accreditation	Define accreditation information for BPV organization locations.
BPV Location Notes	SAD_BPV_LNT_NLD	Student Admissions, Internship Contracts NLD, BPV Locations, BPV Location Notes	Enter notes for BPV organization locations.

Defining BPV Organization Locations

Access the Location Detail page (Student Admissions, Internship Contracts NLD, Organization Locations, Location Detail).

Location Summary

Location Detail

Org ID: SABPV001

BPV Organization

Primary Location: 1

Location 1

Location

Find

First

2 of 2

Last

Location: 2

Location History

Find

View All

First

1 of 1

Last

Effective Date: 01/01/1900

Status: Active

Description: location 2

Short Desc: location 2

Country: NLD

Netherlands

Address: location 2

Location ave 2 2

1002 AA Amsterdam

[Edit Address](#)

[Edit BPV Location Address](#)

Electronic Addresses

Email ID: location2@bpv.nl

URL Address: www.location2.nl

EDI Address:

Location Phones

Customize

Find

View All

First

1-2 of 2

Last

Phone Type	Prefix	Phone	Extension	Preferred		
Business	NLD	0900 070808		☐	+	-
Mobile	NLD	0900 070808		☐	+	-

Last Update Date/Time:

by:

Location Detail page

Click the Edit BPV Location Address link to access the BPV Organization Locations page and review or update the locations for BPV organizations that you add on this page. The Edit BPV Location Address link appears only if you select the Use Dutch Functionality option on the SA Features page.

Reviewing or Updating BPV Organization Locations

Access the BPV Organization Locations page (Student Admissions, Internship Contracts NLD, BPV Locations, BPV Organization Locations).

BPV Organization LocationsBPV AccreditationBPV Location Notes

Org ID: SABPV001BPV Organization

Primary Location: 1Location 1

Find | View AllFirst2 of 2Last

Location: 2

Country: Netherlands

Address: location 2
Location ave 2 2
1002 AA Amsterdam

Organization type:

AR number:

Find | View AllFirst1 of 1Last

Address Type: BUSN☒ Main address

Effective Date: 01/01/1900Country: NLDNetherlands

Status: ActiveAddress: location 2
Location ave 2 2
1002 AA Amsterdam

Edit Address

Copy Default Location Address

BPV Organization Locations page

Note. You cannot use this page to add a BPV organization location. To add a BPV organization location, use the Location Detail page (discussed in the previous section).

Organization type

Select an organization type for this location. Organization types are defined on the BPV Organization Type page.

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AR number (account receivable number)	Enter the account receivable number of the location.
Address Type	Enter the address type for this location. Define address types on the Address Types page.
Main address	Select the primary address for this location.
Copy Default Location Address	Click to copy the address from the Location Detail page. When you click the button, the address appears on the address type row. The button appears only if you select an address type.

To administer phone numbers, access the Location Detail page (Student Admissions, Internship Contracts NLD, Organization Locations, Location Detail). To add or update BPV contacts, access the Contact Detail page (Student Admissions, Internship Contracts NLD, Organization Contacts, Contact Detail).

Defining Accreditation Information for BPV Organizations

Access the BPV Accreditation page (Student Admissions, Internship Contracts NLD, BPV Locations, BPV Accreditation).

BPV Accreditation page

Knowledge centre id	Enter the knowledge center or external organization at this location for which to select accreditation.
External contract	Enter the number of the external contract that has been generated and distributed by the knowledge center to the BPV organization. This is for information only.

HEGIS Code

Enter the CREBO code for which the accreditation applies. Only the HEGIS codes that belong to the knowledge center and are secured through the link between HEGIS code and academic program appear in the prompt.

Appr by nat org

Enter the accreditation status of this organization for this CREBO code. Your options are *Accredited*, *In Cons* (in consideration), and *Not Accr* (not accredited). When you select the Accredited check box when creating a contract on the BPV Contract page, only CREBO codes that are identified as accredited here are available.

Start Date and End Date

Enter the start and end dates of the accreditation.

Setting Up BPV Contacts

This section discusses how to:

- Define BPV organization contacts.
- Define BPV contact persons.
- Define BPV contact person locations.

Pages Used to Set Up BPV Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Contact Detail	ORG_CONTACTS	Student Admissions, Internship Contracts NLD, Organization Contacts, Contact Detail	Add contact information for BPV usage.
BPV Contact Person	SAD_BPV_OCN_NLD	Student Admissions, Internship Contracts NLD, BPV Contact Persons, BPV Contact Person	Define BPV contact persons.
Contact Person Locations	SAD_BPV_OCL_NLD	Student Admissions, Internship Contracts NLD, BPV Contact Persons, Contact Person Locations	Define locations for the contact person.
Contact Person Notes	SAD_BPV_OCN_NT_NLD	Student Admissions, Internship Contracts NLD, BPV Contact Persons, Contact Person Notes	Enter comments about the contact person.

Defining BPV Organization Contacts

Access the Contact Detail page (Student Admissions, Internship Contracts NLD, Organization Contacts, Contact Detail).

Contact Summary

Contact Detail

Org ID:

SABPV001

BPV Organization

Primary Contact:

1

Bill

Title:

Contact

Find

First

1 of 2

Last

Contact:

1

Contact History

Find

View All

First

1 of 1

Last

Effective Date:

01/01/1900

Status:

Active

+

-

ID:

[Edit BPV Contact Details](#)

*Contact Name:

Bill

Job Title:

Contact Type:

PRE

President

Department:

Add Department

Contact Address

Department

Location

Address Type

None

Address:

Add Location

Electronic Addresses

Email ID:

bill@bpv.nl

URL Address:

Contact Phones

Customize

Find

View All

First

1 of 1

Last

*Phone Type	Prefix	Phone	Extension	Preferred		
					+	-

Last Update Date/Time:

by:

Contact Detail page

Defining BPV Contact Persons

Access the BPV Contact Person page (Student Admissions, Internship Contracts NLD, BPV Contact Persons, BPV Contact Person).

BPV Contact Person

Contact Person Locations

Contact Person Notes

Org ID:

SABPV001

BPV Organization



Primary Contact:

1

Bill

Title:

Contact Details

Find | View All

First 1 of 2 Last

Contact Nbr:

1

ID:

Status:

Active

Contact Name:

Bill

First Name:

Bill

Name Initials:

B

Gender:

Male

Job Title:

Contact Type:

PRE

President

Email Address:

bill@bpv.nl

BPV Contact Person page

Note. You cannot use the BPV Contact Persons component to add contacts. Use the component to add BPV specific details for contacts that you added using the Organization Contacts, Contact Detail page.

Contact Nbr

Contacts that appear on this page are active organization contacts. Contact Nbr,ID,Contact Name,Job Title, Contact Type, and Email Address values appear by default from the Organization Contacts, Contact Detail page.

Assign contacts to specific BPV locations on the Contact Person Locations page.

Defining BPV Contact Person Locations

Access the Contact Person Locations page (Student Admissions, Internship Contracts NLD, BPV Contact Persons, Contact Person Locations).

BPV Contact Person

Contact Person Locations

Contact Person Notes

Org ID:

SABPV001

BPV Organization



Primary Contact:

1

Bill

Title:

Contact Details

Find | View All

First

1 of 2

Last

Contact Nbr:

1

Bill

Contact Phone

'Location Nbr

1



Location 1

+

-

Contact Person Locations page

Location Nbr (location number)

You must assign at least one location to contacts.

Creating Internship Contracts

This section discusses how to:

- Create BPV contracts.
- Attach appendixes to BPV contracts.

Pages Used to Create Internship Contracts

Page Name	Definition Name	Navigation	Usage
BPV Contract	SAD_BPV_CTR_NLD	Student Admissions, Internship Contracts NLD, BPV Contracts, BPV Contract	Create a BPV contract.
BPV Location Detail	SAD_BPV_OLC_SP_NLD	Click the Location Nbr button on the BPV Contract page.	View remarks about the BPV location.
BPV Appendix	SAD_BPV_C_BIUL_NLD	Student Admissions, Internship Contracts NLD, BPV Contracts, BPV Appendix	Attach appendixes to the BPV contract, or manually enter appendix text.

Creating BPV Contracts

Access the BPV Contract page (Student Admissions, Internship Contracts NLD, BPV Contracts, BPV Contract).

BPV Contract

BPV Appendix

External Org ID: SABPV001

BPV Internship Organization

Location Nbr: 1

Location 1

☒ Accredited

Delete

'HEGIS Code: 10039

Administrative Employee

Outsourcing company: SABPVKC1

BPV Knowledger centre

Outsourcing location: 1

KC Location

Internal contract: 0010003

External contract: EXTCON1245799

'Description: Internship for Administrative Employee students

'Start Date: 01/01/2000

'End Date: 01/01/2020

Mailing location: 1

Location 1

Instructor ID: AA0002

Acosta,Paul

Contact Nbr:

Contact nbr 2:

Contract length in weeks: 12

Number of hours per week: 16

Maximum Nbr of Students: 45

Total nbr of BPV Hours: 192

Plan

☐ BOL

☐ BBL

☒ All

BPV Contract page

- Accredited

Select to limit the values in the HEGIS Code field to CREBO codes for which this location is accredited. Select Accreditation on the BPV Accreditation page.
- Location Nbr (location number)

Select a BPV organization location. Define organization locations on the BPV Organization Locations page.
- Location Nbr (location number)

Click this button to view location notes for this location. Define location notes on the BPV Location Notes page.
- HEGIS Code

Select a CREBO code for this contract. Only those CREBO codes for which you are authorized to create contracts is available.
- Outsourcing company

Select the outsourcing company for this contract. Define outsourcing companies on the External Organization Table page. If you enter an outsourcing company you must enter a location for it.

Outsourcing loc (outsourcing location)	Enter a location number for the outsourcing company.
Internal contract	When you save the page, the system assigns a number for this contract by adding 1 to the highest number found in the Contract table.
External contract	Enter the external contract number, if applicable.
Start Date and End Date	Enter the start and end dates of this contract. The start and end dates of the contract must fall within the start and end date of the OWO, if the OWO exists.
Mailing location	Enter the location number that will be used for correspondence. Locations are defined on the BPV Organization Location page.
Instructor ID	Select the practicum tutor of the institution. Define instructors on the Instructor/Advisor Table page.
Contact Nbr (contact number)	Select the contact number for the contact at the internship provider. Define contacts for this location on the BPV Contact Person page. Only contacts for this location appear as options.
Contact nbr 2	Select a second contact. Only contacts for this location appear as options.
Contract length in weeks	Enter the number of weeks the contract will last. If you enter values in the Start Date and End Date fields, the system automatically calculates and displays a value in the Contract length in weeks field. Alternatively, you can enter a value directly in the Contract length in weeks field. When you enter values in the Start Date and End Date fields, the system uses the following formula to calculate the Contract length in weeks value: $N \text{ (number of weeks) } = (\text{end date} - \text{start date}) / 7$ $X \text{ (number of weeks after deduction of full years) } = \max(40, N \bmod 52)$ $Y \text{ (number of full years) } = \text{Int}(N / 52) * 40$ $\text{Contract length in weeks} = X + Y$
Number of hours per week	Enter the number of hours per week of this contract.
Maximum Nbr of Students (maximum number of students)	Enter the maximum number of students that can be linked to this contract.
Total nbr of BPV Hours (total number of BPV hours)	If values are entered in the Contract length in weeks and Number of hours per week fields, the system automatically calculates and displays a value in the Total nbr of BPV Hours field and the Total nbr of BPV Hours field becomes unavailable for edit. Alternatively, you can enter a value directly in the Total nbr of BPV Hours field. If you enter a value in the Total nbr of BPV Hours field, the system disables the Contract length in weeks and Number of Hours per week fields.

Plan	Indicate whether this contract is valid for <i>BOL</i> , <i>BBL</i> , or <i>Both</i> .
Delete	Click this button to delete this contract. You can only delete contracts that have no students linked to them.

Attaching Appendixes to BPV Contracts

Access the BPV Appendix page (Student Admissions, Internship Contracts NLD, BPV Contracts, BPV Appendix).

BPV Contract

BPV Appendix

External Org ID:

SABPV001

BPV Internship Organization

Location Nbr:

1

Location 1

HEGIS Code:

10629

Agriculture

Internal contract:

NEW

Appendix document:

Add Appendix

BPV Appendix page

Appendix document	Select the appendix document that you want attached to this contract. Create appendixes on the BPV Appendix page. This field becomes unavailable when the contract is printed.
Add Appendix	Click to add the selected appendix to the contract. You can manually add text to the appendix in the text box. The text box becomes unavailable when the contract is printed.

Adding Students to Contracts

This section discusses how to:

- Match students to contracts.

- Add students to contracts.
- Update a student's contract details.
- Update a student's appendix information.

Pages Used to Add Students to Contracts

Page Name	Definition Name	Navigation	Usage
Match Contracts	SAD_BPV_MATCH_NLD	Student Admissions, Internship Contracts NLD, BPV Match Contracts, Match Contracts	After you have created contracts on the BPV Contracts page, search for and select contracts to match students to the contracts.
Match Contracts - Vacancy	SAD_BPV_CTR_DL_NLD	Click the Detail Panel button on the Match Contracts page.	Select students to add to the contract.
Match Contracts - BPV Vacancy Detail	SAD_BPV_CTR_D3_NLD	Click the Detail Panel button on the Match Contracts - Vacancy page or the Match Students page.	Update contract details for the student.
Match Contracts - BPV Appendix Detail	SAD_BPV_CTR_D2_NLD	Click the Appendix button on the Match Contracts - BPV Vacancy Detail page.	Update BPV appendix information for the student.

Matching Students to Contracts

Access the Match Contracts page (Student Admissions, Internship Contracts NLD, BPV Match Contracts, Match Contracts).

Match Contracts

Select

Deselect

HEGIS Code: Agriculture

Org ID:

Organization type:

☐ Open Only

Selected BPV Locations										
Customize Find View All First 1 of 1 Last										
	External Org ID	Description	Internal contract	Description	Plan	Start Date	End Date	Max	Open Seats	Detail Panel
1	SABPV001	Location 1	0010002	Whatever	Both	09/01/2001	12/31/2001	2	2	

Match Contracts page

HEGIS Code	Select a CREBO code (stored in the HEGIS table) to select contracts for the CREBO code you select.
Org ID (organization ID)	Select an organization ID to limit contracts by organization.
Organization type	Select an organization type to limit contracts by organization type.
Open Only	Select this check box to retrieve only contracts that have vacancies.
Select	Click this button to search for contracts based on the criteria you enter.
Deselect	Click this button to clear the page.
Detail Panel	Click this button to select a contract to which to add students. The Match Contracts - Vacancy page appears, with which you can add students.

Adding Students to Contracts

Access the Match Contracts - Vacancy page (click the Detail Panel button on the Match Contracts page).

Match Contracts

Vacancy

External Org ID:

SABPV001

BPV Internship Organization

Location Nbr:

1

Location 1

HEGIS Code:

10629

Agriculture

Internal contract:

0010002

Whatever

Plan:

Both

Maximum Nbr of Students:

2

*EmplID:

SRN013

GELDER,NICOLAAS J

*EmplID:

SRN011

FEITER,TEUNIS W

Match Contracts - Vacancy page

EmplID (employee ID)	Select students to add to this contract. The values that appear in the prompt differs depending on the BPV user settings (BOL/BBL match) and the Plan field (BOL/BBL/Both) on the BPV contract.
Detail Panel	Click the Detail Panel button to enter contract details for this student.

Updating a Student's Contract Details

Access the Match Contracts - BPV Vacancy Detail page (click the Detail Panel button on the Match Contracts - Vacancy page or the Match Students page).

Match Contracts			
BPV Vacancy Detail			BPV Creation Dt: 12/31/1999
EmplID:	SSRNL00011	Kaassnijder,Klaas	Action Date: 02/10/2009
External Org ID:	SABPV001	BPV Internship Organization	User ID: SAMPLE
Internal contract:	0010003	Internship for Administrative Employee students	
HEGIS Code:	10039	Administrative Employee	
Location Nbr:	1	Location 1	
Outsourcing company:			
Outsourcing Location:			
*Institution:	PSNLD	PeopleSoft University - NLD	*Program: R012 BOL Administrative Specialist
*Career:	BOL	Vocational Training (NLD)	*Acad Load: 0
*Career Nbr:	0		
*Start Date:	01/01/2000	*End Date: 01/01/2020	Printed: Not Printed
Status:	Active		
Instructor ID:	AA0002	Acosta,Paul	
Contact Nbr:		Contract length in weeks:	12
Contact nbr 2:		Number of hours per week:	16
Appendix	Total nbr of BPV Hours		192
Administrative internships should include at least the following tasks - Writing business letters -conducting business phone calls			Appendix

Match Contracts - BPV Vacancy Detail page

Update the student's contract information.

See Also

[Chapter 32, "\(NLD\) Managing BPV Internship Agreements," Creating Internship Contracts, page 1011](#)

Updating a Student's Appendix Information

Access the Match Contracts - BPV Appendix Detail page (click the Appendix button on the Match Contracts - BPV Vacancy Detail page).

Match Contracts

BPV Appendix Detail

EmplID:

External Org ID:

SABPV001

BPV Internship Organization

Internal contract:

0010002

Whatever

HEGIS Code:

10629

Agriculture

Action Date:

09/27/2004

User ID:

PS

Appendix document:

Add Appendix

Appendix text

Match Contracts - BPV Appendix Detail page

Adding Contracts to Students

This section discusses how to:

- Match contracts to students.
- Link contracts to a student.

Pages Used to Add Contracts to Students

Page Name	Definition Name	Navigation	Usage
Match Students	SAD_BPV_MATCH2_NLD	Student Admissions, Internship Contracts NLD, BPV Match Students, Match Students	Search for and select students to which to link contracts.
BPV Student Detail	SAD_BPV_STD1_NLD	Click the Detail Panel button on the Match Students page.	Link contracts to students.

Matching Contracts to Students

Access the Match Students page (Student Admissions, Internship Contracts NLD, BPV Match Students, Match Students).

Match Students

Select

Deselect

*EmpID:

SRN109

BUUREN, RONALD

*Institution:

PSNLD

PeopleSoft University - NLD

*Career:

BOL

Vocational Training (NLD)

*Program:

R002

Agriculture

☐ Open Only

Group:

Approved Academic Load:

Selected Participants

Customize | Find | View All | First 1 of 1 Last

	ID	Name	Career	Program	Approved Academic Load	Detail Panel
1	SRN109	BUUREN, RONALD	Vocational Training (NLD)	Agriculture	Vocational Training (NLD)	

Match Students page

Enter search criteria to retrieve students to which you want to link to contracts. Click the Detail Panel button to link contracts to students.

Linking Contracts to a Student

Access the BPV Student Detail page (click the Detail Panel button on the Match Students page).

BPV add student

Match Students

BPV Student Detail

EmplID:

SRN109

BUUREN, RONALD

Career:

BOL

Vocational Training (NLD)

Program:

R002

Agriculture

Approved Academic Load:

Vocational Training (NLD)

Customize | Find |

First 1 of 1 Last

	*External Org ID	Internal contract	Detail Panel		
1	SABPV001	0010002		+	-

BPV Student Detail page

- External Org ID (external organization ID)

Internal contract

Detail Panel

Select the external organization that manages hosts the internship.

Select the contract that you want to link to this student.

Click this button to access the Match Contracts - BPV Vacancy Detail page to view and update contract details.

Printing BPV Contracts

- Run the Print BPV Contract (SABPVNL) PSJob, which runs three processes:
- Fill Contracts with Print Data (SAD_BPV_FILL) application engine process.
This process adds additional information from your system to PS_SAD_BPV_STC_NLD, which holds the contract.
 - SABPVNL1 (SABPVNL1).
This process prints the contract.
 - SABPVPNL (SABPVNL.sqr).
This process updates the print flag in the contract table.
- You cannot change contract data once the contract has been printed.

Page Used to Print BPV Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print BPV Contracts	SAD_BPV_RUN_NLD	Student Admissions, Internship Contracts NLD, Print BPV Contracts, Print BPV Contracts	Print contract agreements.

Entering Contract Details and Signature Dates

This section discusses how to:

- Enter contract details.
- Update contract information for a student.

Pages Used to Enter Contract Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select BPV Contracts	SAD_BPV_CT_SUM_NLD	Student Admissions, Internship Contracts NLD, Select BPV Contracts	Select contracts by the available criteria and enter contract details, including signature dates.
Maintain BPV contracts	SAD_BPV_CTR_D1_NLD	Click the Detail Panel button on the Select BPV Contracts page.	View or update details about the contract.

Entering Contract Details

Access the Select BPV Contracts page (Student Admissions, Internship Contracts NLD, Select BPV Contracts).

Select Contracts

Change selection

EmplID:

Institution:

Career

Program:

Acad Load:

Group:

Date From:

Date-To:

Start Date:

End Date:

Org ID:

SABPV001

BPV Internship Organization

Type:

☐ Open Only

Selected Participants

Customize | Find | First 1-2 of 2 Last

Contracts detail

Signatures

	Contract printed	Detail Panel	EmplID	Name	*External Org ID	Organization	Internal contract
1	☐		SRN109	BUUREN,RONALD	SABPV001	BPV Internship Organization	0010002
2	☐		SRN110	DIJKXHOORN,ALF M M	SABPV001	BPV Internship Organization	0010002

Select BPV Contracts page: Contracts Detail tab

Enter search criteria to retrieve students to which you want to update contract information. Click the Detail Panel button to update contract information, if the contract has not yet been printed. Enter signature dates on the Signatures tab.

Updating Contract Information for a Student

Access the Maintain BPV contracts page (click the Detail Panel button on the Select BPV Contracts page).

Maintain BPV contracts

Select BPV Contracts & Edit BPV Creation Date

BPV Contract **BPV Creation Date (BRON)** 12/31/1999

Name: Kaassnijder,Klaas **Action Date:** 02/10/2009

'External Org ID: SABPV001 **BPV Internship Organization** **User ID:** SAMPLE

Internal contract: 0010003 **Internship for Administrative Employee** **Change**

HEGIS Code: 10039 **Administrative Employee**

Location Nbr: 1 **Location 1**

Outsourcing company: **Outsourcing location:**

Institution: PSNLD **Career:** BOL **'Career Nbr:** 0 **Acad Prog:** R012 **Acad Load:** 0

'Start Date: 01/01/2000 **'End Date:** 01/01/2020 **Printed:** No Print

Status: Active

Instructor ID: AA0002 **Acosta,Paul**

Contact Nbr: **Contract length in weeks:** 12

Contact nbr 2: **Number of hours per week:** 16

Appendix **Total nbr of BPV Hours** 192

Administrative internships should include at least the following tasks

- Writing business letters
- conducting business phone calls

Appendix

Maintain BPV contracts page

Enter contract details if the contract has not already been printed.

Change

Click to replace the contract entered for the student by another contract. This can only be done when the contract is not printed. When you click the Change button the system retrieves the correct prompt table views for the External Org ID and Internal Contract fields—based on BPV user settings in combination with the academic load—and these fields are made available for entry so you can update them with the new contract.

Chapter 33

(NLD) Creating Educational Agreements

This chapter lists common elements and discusses how to:

- Maintain coursework and agreement information.
- Maintain financial contribution information.
- Review and update educational agreements.
- Determine a selection method for an institution.
- Create OWO contracts.
- Print OWO contracts.

Common Elements Used in This Section

Appendix Document

The reference code of the appendix document.

Maintaining Coursework and Agreement Information

This section discusses how to maintain coursework and agreement information.

Page Used to Maintain Coursework and Agreement Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Course and Support Agreements	SAD_AOHS_NLD	Student Admissions, Educational Contracts NLD, Course and Support Agreements	This page is used to describe the contents of an appendix (with course and support issues) that is printed on the OWO contract. During the creation process of the OWO (SQR process), the appendix that is flagged as the default appendix is added to the OWO contract appendix table. Before printing, this appendix can be replaced for an individual student by another non default appendix from the OWO course and support appendix table. If required, the text can then be modified to the needs for this individual student. During the print process (Crystal report), in the OWO Course and support appendix section of the report, the text from the OWO contract appendix table is then inserted.

Maintaining Coursework and Agreement Information

Access the OWO Course and Support Agreements page (Student Admissions, Educational Contracts NLD, Course and Support Agreements).

OWO Course and Support Agreements

Academic Institution: PSUNV

PeopleSoft University

Academic Organization: LIBARTS

College of Liberal Arts

Appendix document: 52A

Find | View All

First 1 of 1 Last

***Effective Date:** 09/20/2004

Status: Active

☐ Default

***Description:** Course Agreement

Long Description

Per standard course agreement guidelines.

OWO Course and Support Agreements page

- Default**

Select this option to make the appended document the default agreement.
- Long Description**

This region contains the default course and support agreements which can be set up according to the academic organization. The text is effective-dated. Individually this text can be replaced by other agreements in the AOHS appendix table.

Maintaining Financial Contribution Information

This section discusses how to maintain financial contribution information.

Page Used to Maintain Financial Contribution Information

Page Name	Definition Name	Navigation	Usage
OWO Voluntary Contributions	SAD_AVB_NLD	Student Admissions, Educational Contracts NLD, Voluntary Contributions	Maintain information regarding a student's course work requirement and institutional support agreement. During the print process the voluntary contributions text will be inserted on the OWO report in the Voluntary contributions appendix section.

Maintaining Financial Contribution Information

Access the OWO Voluntary Contributions page (Student Admissions, Educational Contracts NLD, Voluntary Contributions).

OWO Voluntary Contributions

Academic Institution: PSUNV

PeopleSoft University

Academic Organization: LIBARTS

College of Liberal Arts

Appendix document: 52A

Find | View All

First 1 of 1 Last

*Effective Date: 09/20/2004

Status: Active

☐ Default

*Description: Voluntary Contribution

Item Amount: 800.00

Description

Voluntary contribution per semester.

OWO Voluntary Contribution page

Item Amount

The entered amount is placed on a fixed position in the voluntary contribution appendix during the print process. The currency is placed by the Crystal (it can be any currency). The voluntary contribution appendix usually contains a text (that explains for example the reason for the voluntary contribution) and the agreed amount. This amount is derived from this field.

Description

A short description of the appendix text. It is only informational. This can be used to find a specific appendix more easily in search records/prompts.

Reviewing and Updating Educational Agreements

This section discusses how to:

- Review and updating educational contract agreements.
- Review details of the OWO contract.
- Add general text appendixes.

Pages Used to Review and Update Educational Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Summary	SAD_OWO_CTRSUM_NLD	Student Admissions, Educational Contracts NLD, OWO Summary	Review and update educational contract agreements for individual students. Updating contract information is only possible when the OWO is not printed. After printing the OWO, only the print flag, return flag/date, and status (active/inactive) can be changed.
OWO Contract Summary	SAD_OWO_CNTRCT_SEC	Click the Detail button on the OWO Summary page to view the OWO Contract Summary page.	Review details of the OWO contract.
Other Text Appendixes	SAD_OWO_APP4_SEC	Click the Detail button on the OWO Contract Summary page to view the Other Text Appendixes page.	Add general text appendixes.

Reviewing and Updating Educational Contract Agreements

Access the OWO Summary page (Student Admissions, Educational Contracts NLD, OWO Summary).

OWO Summary

Select OWO Contracts

Refresh OWO Selection

EmplID: 0004

Institution:

Campus:

Career: UGRD

Status:

Program:

Group select:

Term:

OWO details

More OWO details

Customize | Find | First 1 of 1 Last

	Print	Received	Details	Term	Contract number	Date Signed	EmplID	Name	
1									

OWO Summary page

- Select OWO Contracts

When you click this button, the entered values in the selection area are used to select the OWO contracts from the contract table. When the employee ID is entered, the selection is based only for this employee. If no employee is selected, the other selection fields are used.
- Refresh OWO Selection

Click this button to initiate the selection fields.
- EmplID

Enter the employee identification code for the student.
- Institution

Enter the academic institution attended by the student.
- Acad Prog (academic program)

Enter the academic program of the student.
- Campus

Enter the campus with which the student is affiliated.
- Career

Select the career with which the student is affiliated.
- Term

Select the admit term.
- Status

Select Active or Inactive.

Group Select	If a group selection is required, define the source of the group (when one is selected, then this field becomes available) and enter the group name. The source of the group can be the Class table, Student Group table or Student Block Header table.
OWO Details	
Print	Select if you want to print the OWO to start automatically after the generation process.
Received	When an OWO contract has been printed, this flag can be checked after all signatures needed for the contract are received. On the detail page for this contract, the return date will be set to the system date. This date can be changed by the user.
Details	Click the detail button to view additional data on the OWO contract. When not printed yet, some data can be maintained by the user. After printing the contract, only status and return date for the signatures can be changed.
Contract Number	The contract number which is automatically assigned to this contract by the OWO creation process.
Date Signed	This is the date on which the contract has been created.
EmplID	The student ID for which the OWO contract is created.

More OWO details

Career	The career with which the student is affiliated.
Program	The program with which the student is affiliated.
Student Career Nbr (student career number)	The student career number with which the student is affiliated.
Campus	The campus with which the student is affiliated.
User ID	The ID of the user who is responsible for creating the OWO contract.

Reviewing Details of the OWO Contract

Access the OWO contract summary subpage (Click the Detail button on the OWO Summary page).

Status	The status can be changed from <i>Active</i> to <i>Inactive</i> . The Reason field will appear.

Start Date	The matriculation date of the student.
End Date	The matriculation date of the student plus the duration.
Duration (Hours)	The total duration of the OWO agreement in hours.
Old contract nbr (old contract number)	If the OWO contract replaces another OWO contract, the old contract number can be maintained here.
Complete education	If this option is not selected, then all the plans linked to the student will display.
Agreements AOHS (agreements appendix educational help structure)	If this option is not selected, then you are able to link to another appendix. The description also becomes available for text entries related to the student. Only appendixes that are not the default appendix will appear in the available options.
Agreements AVB (agreements voluntary contributions)	If this option is not selected, then you are able to link to another voluntary financial contribution appendix. Enter the amount and description for the student. Only appendixes that are not the default appendix will appear in the available options.

Note. After the contract is printed no additional data can be entered. If you need to correct data, then the contract must be set to inactive, a reason entered, and then a new contract must be generated. You may reprint the contract.

Adding General Text Appendixes

Access the Other Text Appendixes page (Click the Detail button on the OWO Contract Summary page).

Enter additional text which can be added to the OWO contract. The information can be used for institutions that need to add extra data to the OWO contract. Crystal can be customized to put this text on any place on the OWO contract.

Determining a Selection Method for an Institution

This section discusses how to determine a selection method for an institution.

Page Used to Determine a Selection Method for an Institution

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
OWO Setup Table	SAD_OWO_INS_NLD	Student Admissions, Educational Contracts NLD, OWO Setup	Determine selection method for an institution.

Determining a Selection Method for an Institution

Access the OWO Setup Table page (Student Admissions, Educational Contracts NLD, OWO Setup).

OWO Setup Table

Academic Institution: PSNLD PeopleSoft University - NLD

Method of OWO selection

☐ Applicant ☒ Matriculation ☐ Activated for Term

OWO Setup Table page

Use this page to control the way the OWO creation process should select the students, for which a contract is created. Choose one of the three options.

- Applicant

Only students for whom at least an application entry has been made can be selected during the OWO contract creation process.
- Matriculation

Matriculation of a student enrollment is the basis for OWO creation. Only students with a matriculation record can be selected.
- Activated for Term

Students need to be activated for a specific term first before they can be selected for the OWO creation process.

Creating OWO Contracts

This section discusses how to create OWO contracts.

Page Used to Create OWO Contracts

Page Name	Definition Name	Navigation	Usage
Create OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions, Educational Contracts NLD, Create OWO Contracts	Generate educational contract agreements for groups of students or for individuals.

Creating OWO Contracts

Access the Create OWO Contracts page (Student Admissions, Educational Contracts NLD, Create OWO Contracts).

Create OWO Contracts

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

*Institution: PSUNV PeopleSoft University Academic Career: UGRD Undergraduate Selection Criteria ☐	Address Type MAIL Mailing Type of Name LEG Legal ☒ Replace contracts Current Effective Date 09/21/2004 Start Date 09/21/2004 End Date 12/31/2004
Academic Program: LAU Liberal Arts Undergraduate Term: 0532 2004 Fall Qtr Campus: MAIN Main Hacienda Campus Group selection: Class table Group:	

Create OWO Contracts page

The actual process that generates the OWO is a batch process.

Institution	Enter the institution for which you want to create the OWO.
Academic Career	Enter the career for which you want to create the OWO.
Selection Criteria	Select this option if you want to create a contract for just one student. The Student ID and Career Nbr fields display.
Student ID	Select the student ID of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.
Career Nbr (career number)	Select the career number of the student for whom you want to create the OWO. This field displays only if the Selection Criteria check box is selected.
Academic Program	Enter the program for which you want to create the OWO.
Term	Enter the admit term for which you want to create the OWO.
Campus	Enter the campus for which you want to create the OWO.

Group selection	If a group selection is required, define the source of the group and (when one is selected this field becomes visible), enter the group name. The source of the group can be the Class table, Student group table or Student block header table.
Group	Select the group, block, or class section the student is in.
Address Type	Enter the address type that must be used for the student's address on the OWO.
Type of Name	Enter the name type that must be used for the student's name on the OWO.
Replace contracts	Use to set the old contract to inactive, allowing for a new OWO contract to be created.
Current Effective Date	Available when the Replace contracts check box is selected. Only contracts with an end date that is earlier than the entered current effective date are part of the selection
Start Date	When a start date is entered, it will be put on the OWO contract as start date and the end date must be entered . When not entered, the start date is determined by the OWO creation process.
End Date	End date must be entered if a start date is given. This date will be recorded on the OWO contract as the end date during the OWO creation process. If it is not entered, the creation process will automatically calculate the end date of the contract.

Printing OWO Contracts

This section discusses how to print OWO contracts.

Page Used to Print OWO Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Print OWO Contracts	SAD_RUN_OWO_NLD	Student Admissions, Educational Contracts NLD, Print OWO Contracts	Print educational contract agreements for groups of students or for an individual.

Printing OWO Contracts

Access the Print OWO Contracts page (Student Admissions, Educational Contracts NLD, Print OWO Contracts).

Print OWO Contracts

Run Control ID: 1

[Report Manager](#)[Process Monitor](#)

Run

***Institution:**PSUNVPeopleSoft University

Academic Career:UGRDUndergraduate

Selection Criteria ☐

Academic Program:LAULiberal Arts Undergraduate

Term:05322004 Fall Qtr

Campus:MAINMain Hacienda Campus

Group selection:Student Group table

Group:ACDX

Print OWO Contracts

If you want to print a contract for just one student, select the Selection Criteria option. The EmplID and Career Nbr fields appear on the page.

See Chapter 33, "(NLD) Creating Educational Agreements," Creating OWO Contracts, page 1033.

Chapter 34

Calculating Admissions Averages

This chapter provides an overview of admissions averages calculation, lists prerequisites, and discusses how to:

- Set up rules for the Admissions Averages SQC.
- Run the Application Materials Extract process.
- Evaluate applicants based on admissions averages.
- Run the Application Status Update process.
- Update admissions averages for financial aid and student records.

Understanding Admissions Averages Calculation

When you evaluate an applicant for admission to your organization, you can evaluate that applicant by the grade point average he or she earned in a specific set of classes. For example, an institution with a nursing program can evaluate applicants based on the grade point averages applicants earned in nursing prerequisites.

You can calculate the grade point average, evaluate the applicant based on that grade point average—an SQC defined by your institution determines the status of the application—and then update the applicant's application status.

To evaluate applicants based on admissions averages:

1. Set up the rules for the delivered admissions averages SQC (ADEVLAVG.sqc).
2. Assign the admissions evaluation code to the applicant and run the Materials Extract process (ADMTLEXT.sqr).
3. Run the Evaluating Applicants process (ADMTLRTG.sqr) to calculate the average.
4. Update the application status (ADMTLPGS.sqr).
5. You can also update financial aid and student records and generate an admissions average report.

Prerequisites

To calculate admissions averages, you use rating components, rating schemes, and evaluation codes. You set up one rating component for averages (AVDAVG), but you can set up many rating schemes that use the averages rating component. You can name your rating schemes whatever you like, but you must link the average rating component to each scheme that calculates admissions averages. For example, suppose that you calculate averages for your nursing program using the rating scheme UAVGNUR, for your computer engineering program using the rating scheme UAVGCEN, and for your honors English program using the rating scheme UAVGHEN. You would need to assign each of these rating schemes the ACDACG rating component.

You enter an SQC on the rating scheme, and you link the rating scheme to the evaluation code. You enter this code when you run the Evaluation Calculation process (ADMTLRTG.sqr) to calculate the averages. The evaluation code is linked to the rating scheme, which tells the process to execute the SQC.

Steps to take before you calculate admissions averages:

- Define an admissions averages rating component.

Use the Rating Comp Def Table (rating component definition table) page to define an admission average rating component. Each rating scheme can have many rating components. For example, you can evaluate applicants based on an interview, SAT/ACT scores, overall GPA, and a grade average of a group of prerequisites. Each of these parameters would be defined as a rating component. You can also define a rating component for an overall score that the system uses to determine the application status. However, you need a rating component set up specifically for averages because the admissions averages SQC has to be associated with a specific rating component to calculate the desired averages.

Important! When you enter the Rating Comp Def Table page for the first time, the system asks you to enter an institution and a rating component. Enter ADAVG in the Rating Component field.

- Define an admissions averages rating scheme.

Use the Rating Scheme Table page to define the admissions average rating scheme that the system uses in the admissions evaluation process. You can name the rating scheme whatever you like, and you can define many rating schemes to calculate various admissions averages.

Use the Rating Components Table page to assign the admissions averages rating component (ADAVG) to the rating scheme, and to enter the SQC that the process uses to calculate averages.

When setting up the rating scheme for calculating admissions averages, be sure to select the Final Value check box on the Rating Components Table page. You must select this check box for the Evaluation Calculation process (ADMTLRTG.sqr) to consider this rating component in the admissions decision. Selecting this check box also enables you to post the results of the calculation to the application, and to update the Averages for Fin. Aid and Recs (averages for financial aid and records) page.

The Method field must be set to Automatic to call the averages calculation SQC.

Important! You must enter ADEVLAVG in the Formula ID field. This is the delivered SQC that the system must run to calculate admissions averages.

- Define an admissions averages evaluation code.

Use the Evaluation Table page to define your evaluation code for admissions averages. Select the rating scheme that you want to use to calculate admissions averages—the averages rating component (ADAVG) must be tied to this rating scheme—in the Overall Rating ID field. This is the hook that ties the evaluation code to the average calculation SQC. In addition, when you prepare to run the Evaluation Calculation process, you enter an evaluation code. The process runs the Evaluation Calculation process on applications that are assigned the same evaluation code.

Important! In order for an application to be considered during the Evaluation Calculation process, the application must have an evaluation code assigned on the Application Evaluation page.

Setting Up Rules for the Admissions Averages SQC

To set up rules for admissions averages SQC, use the Alternate Average Calculations component (PROG_AVG_CALC_DEFN).

This section discusses how to set up rules for the admissions averages SQC, and provides examples of average program calculation and external courses and admissions averages.

Page Used to Set Up Rules for the Admissions Averages SQC

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Program Average Calculation	PROG_AVG_CALC	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Average Calculations	Set up rules for the delivered admissions averages SQC (ADEVLAVG). Using the criteria that you select in this page, the SQC searches the applicant's external course history to find courses that match the criteria that you set up here. After the process finds a match it takes the official grade from the external course history, converts it to a numerical value if it is not in this format already, and averages it with the other course grades it finds.

Setting Up Admissions Averages SQC Rules

Access the Program Average Calculation page (Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Average Calculations).

Program Average Calculation			
Academic Institution:		PSUNV PeopleSoft University	
Evaluation Code:		ADMAVG Admissions Average	
Find View All First 1 of 1 Last			
*Effective Date:	01/01/1900	Course Credit Count:	3.00
Crse Level:	Junior	External Academic Level:	11th Grade
Minimum Score:		*Repeated Grade Processing:	Highest
Find View All First 1 of 1 Last			
*Transcript Status:		Final	
Find View All First 1 of 6 Last			
*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	1	ENGL70	
Cottonwood High School		SHORT STORY	

Program Average Calculation page

Course Credit Count

Enter the minimum number of total course credits that the applicant must have taken in order for the process to calculate an admissions average. The average calculation process looks at each course listed in the Courses and Degrees page for this applicant to find matches based on the criteria you select. The process counts the number of course credits for each course. If the process—using the criteria that you set up—cannot find enough matches to add up to your course credit criteria, the process does not generate an average. The process instead produces the following error message: "An average was not calculated because the student has not met the minimum course credit count."

See [Chapter 34, "Calculating Admissions Averages," Viewing Admissions Calculation Errors, page 1047.](#)

Crse Level (course level)

Select the course level required for this average calculation. The process only looks at external courses that have the value that you select in the Course Level field on the Courses and Degrees page.

External Academic Level

Select the external academic level required for this average calculation. The process only looks at external courses that have this external academic level in the Acad Level field on the Courses and Degrees page.

Minimum Score

Enter a minimum score if you want the process to only include in the calculation average those external courses that contain a score of at least the value that you enter in the Grade In/Official field on the Courses and Degrees page. For example, A minimum score of 50 is entered. Thus, an external course that meets all of the other criteria that are set up on this page but contains a grade of less than 50 is not used in the average calculation.

Repeated Grade Processing	Select how you want the process to choose between two or more repeated courses. Values for this field are delivered with your system as translate values. You can modify these translate values. Values are: <i>First:</i> If the process finds a repeated course, it uses the grade of the first course it finds in the calculation process. <i>Highest:</i> If the process finds a repeated course, it uses the highest grade of the repeated courses in the calculation process. <i>Last:</i> If the process finds a repeated course, it uses the grade of the last course it finds in the calculation process.
Transcript Status	Select the transcript status to be used in this average calculation. The system only uses those applications with this transcript status in the calculation process. You can insert a row to specify more than one transcript statuses.
External Org ID (external organization ID)	Enter the external organization ID that is associated with the course that is to be used in this average calculation.
Req# (requirement number)	Requirement number enables the average calculation SQC (ADEVLAVG) to determine which group of courses should be evaluated together when more than one course can satisfy a program prerequisite. See Chapter 34, "Calculating Admissions Averages," Viewing an Average Program Calculation Example, page 1041.
Wildcard	Select this option if you want to calculate all courses that begin with the value in the School Course Nbr field. For example, if you entered SCNC in the School Course Nbr field, and selected the Wildcard option, the process would look for any course beginning with SCNC, such as SCNC10, SCNC100, and SCNC15.
School Course Nbr (school course number)	Enter the school course number to be used for this average calculation.
Min Grade (minimum grade)	Enter a minimum grade if you want to override the Minimum Score field for this external course.

Viewing an Average Program Calculation Example

Suppose that one of the criteria with which you evaluate applicants is a grade point average of a select number of classes. You calculate the average and use the average calculation functionality to evaluate applicants and update the application status.

For example, suppose that you evaluate applicants on the grade point average of the following courses:

1. ENGL70
2. MATH104
3. One of the following: ENGL100, ENGL92, or SCNC25

Therefore, use an average based on the grades of only three courses in our Evaluation Calculation process. To calculate the average, enter the first course in the Program Average Calculation page just as in the previous page shot. Then, insert a row in the bottom portion of the page and do as follows:

Program Average Calculation

Academic Institution: PSUNV PeopleSoft University
Evaluation Code: ADMAVG Admissions Average

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Course Credit Count: 3.00
 Crse Level: Junior External Academic Level: 11th Grade
 Minimum Score: *Repeated Grade Processing: Highest

Find | View All First 1 of 1 Last

*Transcript Status: Final

Find | View All First 2 of 6 Last

*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	2	MATH104 ADV ALGEBRA	

Cottonwood High School

Example of Program Average Calculation page (1 of 4)

Select your second prerequisite in the School Course Nbr field and change the Req# value to 2. This tells the system to treat this course as a separate course, and to use the grades that the applicant earned in both of these courses in the calculation. Then insert a row as follows:

Program Average Calculation

Academic Institution: PSUNV PeopleSoft University
Evaluation Code: ADMAVG Admissions Average

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Course Credit Count: 3.00
 Crse Level: Junior External Academic Level: 11th Grade
 Minimum Score: *Repeated Grade Processing: Highest

Find | View All First 1 of 1 Last

*Transcript Status: Final

Find | View All First 3 of 6 Last

*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	ENGL100 SPEECH	

Cottonwood High School

Example of Program Average Calculation page (2 of 4)

Enter a third course in the School Course Nbr field and change the Req# to 3. Then, insert two more rows and select the remaining two courses, but keep the Req# value the same.

Program Average Calculation

Academic Institution: PSUNV PeopleSoft University
Evaluation Code: ADMAVG Admissions Average

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Course Credit Count: 3.00
 Crse Level: Junior External Academic Level: 11th Grade
 Minimum Score: *Repeated Grade Processing: Highest

Find | View All First 1 of 1 Last

*Transcript Status: Final

Find | View All First 4 of 6 Last

*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	ENGL92	
Cottonwood High School			

Example of Program Average Calculation page (3 of 4)

Note in page shot 3 of 4 that Req# is still 3, but you selected a second course.

Program Average Calculation

Academic Institution: PSUNV PeopleSoft University
Evaluation Code: ADMAVG Admissions Average

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Course Credit Count: 3.00
 Crse Level: Junior External Academic Level: 11th Grade
 Minimum Score: *Repeated Grade Processing: Highest

Find | View All First 1 of 1 Last

*Transcript Status: Final

Find | View All First 5 of 6 Last

*External Org ID	*Req. #	*School Course Nbr	Min Grade
000000001	3	SCNC25	
Cottonwood High School			

Example of Program Average Calculation page (4 of 4)

Note in page shot 4 of 4 that Req# is still 3, but you selected a third course. Because there are three courses with the Req# of 3, the process only uses one of the courses in the calculation. If the applicant took only one of the courses, the system would use that course. If the applicant took more than one of these courses, the system treats the courses as repeated and selects a class to use in the calculation process based on the option selected in the Repeated Grade Processing field.

The system averages the scores of ENGL70 and MATH104, and the Highest of ENGL100, ENGL92, and SCNC25. From here, go to the Evaluation Calculation page to run the process and then to the Overall Rating page to view the result in the Rating Value field.

Viewing an External Courses and Admissions Averages Example

The courses that you select on the Program Average Calculation page are assigned to the student on the Courses and Degrees page. The calculation process looks at the Courses and Degrees page for each student to determine which courses to use in the calculation.

The following example represents an external course for an applicant.

Student Recruiting, Maintain Prospects, Academic Information, Education, Courses and Degrees or Student Admissions, Application Entry, Academic Information, Education, Courses and Degrees

External Education

Courses and Degrees

Regional

Jane Smith
AD5023

External Organization

Find | View All

First 1 of 1 Last

External Org ID:

000000001

Cottonwood High School

+

-

External Course Defaults

Data Number:

1

External Career:

High Schl

Apply Defaults

Data Source:

School

Term Type:

Quarter

Acad Level:

Junior

External Term:

Institution:

PSUNV

PSU

Term Year:

Course Type:

Course

Course Level:

Senior

Unit Type:

Quarter

Units Taken:

6.00

Grading Scheme:

Normal

Grading Basis:

GRD

Graded

External Courses

Customize | Find | View All

First 1 of 1 Last

Course

Grades

Timeframe

Details

Transfer Credit/ Comments

Course Seq	*School Subject	Description	*Course Nbr	*Course Name		
1	MATH	Mathematics	MATH105	PL/SL GEOM	+	-

External Degrees

Customize | Find | View All

First 1 of 1 Last

Degree

Field of Study

Transcript

	Degree	*Description	*Degree Date	*Data Source	*Degree Status	*Honors Category		
1	HSD	High School Diploma		School	Complete	None	+	-

Transfer To:

Course Credits

Go

Example of Courses and Degrees page

For this course to be included in the average calculation, the Course Nbr (course number) field on the Courses and Degrees page: Course tab must correspond with the School Course Nbr (school course number) field on the Program Average Calculation page. If you choose a course level and external academic level on the Program Average Calculation page, the process compares that to the Course Level field and Acad Level (academic level) field on Courses and Degrees page: Details tab. If there is a match, then this course is included in the average calculation. The SQL goes down each course on the applicant's record to look for a match based on the criteria that you set up.

The system uses the translated value in the field to the right of the Grd In/Official (grade in/official) field for the average calculation. The average calculation only runs for numeric grades. The average calculation converts non-numeric grades into numeric grades to be used in the average.

Running the Application Materials Extract Process

Before you can run the Evaluation Calculation process you must run a process to link all or a portion of a person's application materials to an application, or you must link the materials manually through the Application Materials page. These materials can then be used for evaluating the application. The Application Materials Extract process extracts the materials associated with the rating scheme that is assigned to the evaluation code. Evaluation codes must be assigned to the applicant on the Application Evaluation page so the Application Materials Extract process knows which records to extract. Ensure that the admissions evaluation code is assigned to the applicants before running the extract process or before linking the materials manually.

See Also

[Chapter 30, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 986](#)

[Chapter 15, "Tracking General and Application Materials for Prospects and Applicants," Entering General Materials for Prospects and Applicants, page 183](#)

Evaluating Applicants Based on Admissions Averages

After you have properly flagged the external course grades to include in the average calculation—by setting up the rules for the SQC—you can run the Evaluation Calculation process (ADMTLRTG). To run this process, select an evaluation code. By selecting an evaluation code you call the rating scheme (which is tied to the evaluation code). When you defined the rating scheme in an earlier step, you entered the averages SQC. Thus, running the Evaluation Calculation process performs the average calculation.

After the process calculates the average, you can view the result. But if the process encountered an error, you can view the error messages online, correct the error, and re-run the process.

This section discusses how to:

- Run the Evaluation Calculation process.
- View the newly calculated average.
- Correct admissions calculation errors.

- View admissions calculation errors.

Page Used to Evaluate Applicants Based on Admissions Averages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Alternate Avg Calc Messages (alternate average calculation messages table)	AVG_PRC_MSG_TBL	Student Admissions, Application Evaluation, Alternate Avg Calc Messages	View admissions calculation errors.

Running the Evaluation Calculation Process

Use the Evaluation Calculation page to calculate the admissions average. This process updates the Rating Value field on the Overall Rating page with the newly calculated average.

Enter the evaluation code that calls the appropriate admissions average rating scheme. The rating scheme that you select here must contain the admissions average rating component (ADAVG) and SQC (ADEVLAVG) to calculate the admissions average.

See Also

[Chapter 30, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 987](#)

Viewing the Newly Calculated Average

Use the Overall Rating page to view the newly calculated average. After you run the Evaluation Calculation process with the delivered averages SQC (ADEVLAVG), the resulting average appears on this page in the Rating Value field. However, the average only appears on this page when the system successfully calculates the average. If the Evaluated check box is selected but there is no value in the Rating Value field, an error was encountered during the process. The next section describes how to view admissions calculation errors.

See Also

[Chapter 29, "Evaluating Applicants," Creating Application Evaluations, page 971](#)

Correcting Admissions Calculation Errors

The Evaluation Calculation process runs for every applicant who has been assigned the evaluation code for which you are running the process. Sometimes an applicant who has been assigned the evaluation code does not meet all of the criteria for calculating an average that you select. For example, if you specify that applicants must have taken the course SCNC100 to be given an average, and an applicant who has been assigned the evaluation code for which you run the Evaluation Calculation process has not taken this course, the process does not generate an average. Instead, the Evaluation Calculation process generates an error message that tells you why it did not generate an average.

You know that an error occurred when the Evaluated check box is selected but there is no value in the Rating Value field on the Overall Rating page. View Admissions Calculation Errors on the Alternate Avg Calc Messages (alternate average calculation messages) page.

See Also

[Chapter 29, "Evaluating Applicants," Creating Application Evaluations, page 971](#)

Viewing Admissions Calculation Errors

Access the Alternate Avg Calc Messages page (Student Admissions, Application Evaluation, Alternate Avg Calc Messages).

Alternate Avg Calc Messages

Find | View All First 1 of 1 Last

Instance: Institution: PSUNV ID: 0002 Appl Nbr: Search

Eval Code: GRADMATH Component: 1OVER

Process Instance: Evaluation Nbr:

ID: Application Nbr: Prog Nbr:

Rating Component: Evaluation Code:

User ID: Run Date/Time:

Message Set Number: Message Number:

Message Severity:

Message Text:

Description:

Alternate Avg Calc Messages page

Note. You must enter at least one search parameter in addition to institution.

Instance	Enter a process instance. Each time the evaluation process runs, the system assign a number to that specific instance. Enter a process instance number to search for error messages generated during that instance of the process.
ID	Enter a student's identification number. The system looks for any error messages that the system generated when calculating averages for this ID.
Appl Nbr (application number)	Enter an application number. The system looks for any error messages that the Evaluation Calculation process generated when calculating averages for this application number.
Eval Code (evaluation code)	Enter an evaluation code. The system looks for error messages that the Evaluation Calculation process generated for this evaluation code.
Component	Enter a rating component. The system looks for error messages that the Evaluation Calculation process generated for this rating component.
Search	Click this button to search for messages using the criteria you select.

Error Messages

There are three error messages delivered with the application. The process generates error messages when an applicant who has been assigned the evaluation code does not meet the criteria you specified for the admissions SQC on the Avg Prog Calc page.

- Minimum course credit count not met.

Description: "An average was not calculated because the student has not met the minimum course credit count."

Example: You enter 60 in the Course Credit Count field on the AVG Prog Calc page but the applicant's total course credit count only equals 58.

Description: "An average was not calculated because the student has not met the minimum grade requirement."

Example: You select 2.0 in the Minimum Score field. The applicant took the prerequisites you specified but did not achieve a grade of 2.0 in that course.

- Program prerequisites have not been met.

Description: "An average was not calculated because the student does not have the necessary courses to meet the program prerequisites."

Example: You entered the prerequisite SCNC10 in the School Course Nbr field on the Avg Prog Calc page but this course is not listed on this applicant's external course record.

Running the Application Status Update Process

Use the Application Status Update page to update the application statuses of those applicants for whom the Evaluation Calculation generated an admissions average. These are applicants who were assigned the admissions average evaluation code and who met all of the SQC criteria that you specified on the Program Average Calculation page. This process also updates the Averages for Fin. Aid and Recs page.

Select the evaluation code that contains the admissions average rating scheme. This is the same evaluation code that you used to run the Evaluation Calculation process. The application status update process uses the result from the Evaluation Calculation process to update the applicant's application status.

Note. An SQC defined by your institution determines the status of the application based on the sum of the final evaluation calculation values.

The application status update process also updates the Program Action field on the Application Program Data page.

See Also

[Chapter 30, "Evaluating Applicants Using Automatic Processing," page 981](#)

[Chapter 17, "Adding and Updating Applications," Entering Application Program Data, page 216](#)

Updating Admissions Averages for Financial Aid and Student Records

The section discusses how to update admissions averages for financial aid and student records.

Page Used to Update Admissions Averages for Financial Aid and Student Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Avgs for Fin Aid and Records (averages for financial aid and student records)	ADM_EVAL_FA_SR_PNL	Student Admissions, Application Evaluation, Avgs for Fin Aid and Records	Update admissions averages in PeopleSoft Financial Aid and PeopleSoft Student Records.

Using the Averages for Fin Aid and Records Page

Access the Avgs for Fin Aid and Records page (Student Admissions, Application Evaluation, Avgs for Fin Aid and Records).

Avg for Fin Aid and Records

Bill Harris **Person ID:** AD9200

Institution: PSUNV **Academic Career:** UGRD

Admit Term: 0540 **Rating Component:** ACT

Appl Nbr	Eval Dt	Eval Code	Eval Nbr	Acad Prog	Prog Actn	Value	FA	SR
00024158	10/25/2004	ACT	1	FAU	Admit	28.0000	☐	☐

Find | View All First ◀ 1 of 1 ▶ Last

Avg for Fin Aid and Records page

There are two ways financial aid and student records personnel can use admissions averages. The first way is to access this page and view the averages for specific applicants.

However, if you want to update PeopleSoft Financial Aid and PeopleSoft Student Records automatically, you can write SQRs that extract the information from Recruiting and Admissions. First, write an SQR to select or clear the FA (financial aid) and SR (student records) check boxes. This SQR tells the system which application numbers you want to make available to Financial Aid and Student Records. Second, write an SQR to extract the admissions average data. The SQR(s) that you write should extract the averages and send them to Financial Aid to be used in determining awards, and to Student Records so that the averages travel with the applicant throughout his or her career at your organization.

Chapter 35

Using Admissions Average Cutoff Reports

This chapter provides an overview of the admissions average cutoff report and discusses how to generate admissions average cutoff reports.

Understanding the Admissions Averages Cutoff Report

Recruiting and Admissions enables you to assess an evaluated applicant pool to determine the admissions average that drive certain program actions. For example, you might need to know how many applicants within an evaluation code, who have admissions averages between 85 and 100, have the program action of ADMT.

To generate an admissions average cutoff report:

1. Set up the criteria that determine the content of the report.

The report tallies the number of applicants who:

- Are assigned the specified evaluation code, have an admissions average that falls within the range, and have the appropriate program action based on the range you define.
- Are assigned the specified evaluation code, have an admissions average that falls within a defined range, but do not have the appropriate program action based on the range you define.
- Are assigned the specified evaluation code (the total number of applicants assigned this evaluation code).

2. Run the average cutoff report process (ADAVGCUT.sqr).

The process retrieves the rating component that is attached to the admissions average SQC (ADEVLAVG.sqc). Next, the process tallies applicants based on the program actions and value ranges that you specified on the Average Cutoff Report page. Finally, the process generates a report according to your Process Scheduler settings and calls it `adavagcut.lis`.

Generating Admissions Average Cutoff Reports

To set up the average cutoff table, use the Average Cutoff component (AVERAGE_CUTOFF_TBL).

This section discusses how to set up the average cutoff table.

Pages Used to Generate Admissions Average Cutoff Reports

Page Name	Definition Name	Navigation	Usage
Average Cutoff Table	AVG_CUTOFF_TBL	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Average Cutoff Table, Avg Cutoff Table	Set up the criteria that you want the system to report.
Average Cutoff Report	RUNCTL_ADAVGCUT	Student Admissions, Reports, Average Cutoff Report	Run the average cutoff report.

Setting Up the Average Cutoff Table

Access the Average Cutoff Table page (Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Average Cutoff Table, Avg Cutoff Table).

Average Cutoff Table

Academic Institution: PSUNV PeopleSoft University
Academic Career: UGRD Undergraduate
Academic Program: LAU Liberal Arts Undergraduate
Admit Term: 0540 2005 Spring
Admit Type: FYR First-Year

Find | View 2 First 1-3 of 3 Last

*Program Action:	ADMT	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	3.6000	*Cutoff Average To Range:	4.0000	

*Program Action:	DENY	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	1.0000	*Cutoff Average To Range:	3.0000	

*Program Action:	WAIT	*Evaluation Code:	ADMAVG	+ -
Cutoff Average From Range:	3.1000	*Cutoff Average To Range:	3.5000	

Average Cutoff Table page

Program Action	Enter the program action that an applicant should be assigned if his or her average falls within the range that you enter. The report displays the number of applicants whose average falls within this range but <i>are not</i> assigned this program action, as well as those who fall within the range and who <i>are</i> assigned this program action.
Evaluation Code	Enter the evaluation code for which you want to generate a cutoff report. The system only queries applications that are assigned the evaluation code that you enter here for the program action and average range.
Cutoff Average from Range	Enter the minimum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.
Cutoff Average to Range	Enter the maximum value an average can be for the system to consider the program action effective for the group of applicants that are assigned the evaluation code that you enter.

In the previous page shot, all applications to the undergraduate liberal arts program for admit term Fall 2001 with the first year admit type, that are assigned the evaluation code ADMAVG and that have an average between 3.6 and 4.0 inclusive appears on the report under the program action of *Admit*. Those applications with an average between 1.0 and 3.0 inclusive appears on the report under the program action of *Deny*. Those applications with an average between 3.1 and 3.5 inclusive appears on the report under the program action of *Wait*.

See Also

Appendix B, "Recruiting and Admissions Reports," Recruiting and Admissions Reports: Selected Reports, page 1167

Chapter 36

Creating Alternate Program Offers

This chapter provides an overview of alternate program offers and discusses how to:

- Assign alternate evaluation codes.
- Select applicants for alternate offers.
- Assign alternate programs.

Understanding Alternate Program Offers

When applicants do not meet the requirements for their requested program, you can evaluate them in alternate programs, thereby giving them a second chance to attend your organization. For example, an applicant might be denied entry to your highly competitive engineering program, but when re-evaluated for a less competitive program the same applicant might be accepted.

To create alternate program offers you must first assign an alternate academic program and an alternate evaluation code. You select the primary academic program to which the person is applying (such as FAU), and then specify the alternate program (such as LAU). Thus, all applicants who get denied or waitlisted for FAU, in this example, get evaluated in the LAU program.

After you have assigned alternate program evaluation codes, you run the Assign Alternate Eval Codes process (ADALTEVL.sqr) that assigns alternate evaluation codes to applicants. You will select applicants based on academic institution, the academic program that they requested, and the admit term. For example, if you select the program LAU and admit term 0450, the process will assign an alternate evaluation code to applicants who applied to but were denied or waitlisted to LAU in Fall 2001.

After you have assigned alternate evaluation codes to applicants, you must either run the materials extract process, or assign the materials manually. Then you must run the Evaluation Calculation process to evaluate them in the new program using the new evaluation code that you just assigned to them.

After the Evaluation Calculation process calculates the overall rating score, you run the Alternate Programs process (ADALTPRG.sqr). The Alternate Programs process compares the minimum rating score that you define to the overall rating score that the Evaluation Calculation process calculates. If the applicant meets the criteria, the Alternate Programs process inserts a new row in the person's application (adm_appl_prog) for the existing application number and assigns a new program number. Thus, you still have access to the application in which the person was denied or waitlisted.

Assigning Alternate Evaluation Codes

To set up alternate evaluation codes, use the Alternate Offer component (ALT_OFFER_TABLE).

This section discusses how to assign alternate evaluation codes.

Page Used to Assign Alternate Evaluation Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Alternate Offer Table	ALT_OFFER_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Offer Table	Assign alternate offer program evaluation codes to academic programs.

Assigning Alternate Evaluation Codes

Access the Alternate Offer Table page (Set Up SACR, Product Related, Recruiting and Admissions, Alternate Evaluations, Alternate Offer Table).

Alternate Academic Program Enter the alternate program. Any person who applies and is either denied or waitlisted to the academic program that you specified upon entering this page will be evaluated in the alternate program that you enter here. For example, you can set it up so that any person applying to LAU, who is denied or waitlisted in that program, will be evaluated in *FAU* using the *ACT* evaluation code.

Alternate Evaluation Code Enter the evaluation code the system will use to evaluate the applicant in the alternate program. For example, an applicant who was denied or waitlisted in the undergraduate engineering program using the *UGENG* evaluation code may be accepted into the Liberal Arts program using the *ACT* evaluation code. Define alternate evaluation codes on the Evaluation Table page.

Selecting Applicants for Alternate Offers

This section discusses how to select applicants for alternate offers.

Page Used to Select Applicants for Alternate Offers

Page Name	Definition Name	Navigation	Usage
Assign Alternate Eval Codes (assign alternate evaluation codes)	RUNCTL_ADALTEVL	Student Admissions, Processing Applications, Assign Alternate Eval Codes	Run the Alternate Averages process. The process assigns the alternate evaluation code that you set up on the Alternate Offer Table page to any applicants who applied to the academic institution and academic program for the admit term that you select.

Selecting Applicants for Alternate Offers.

Access the Assign Alternate Eval Codes page (Student Admissions, Processing Applications, Assign Alternate Eval Codes).

Note. Admissions application records use the Last Admit Term value to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Institution	Enter the academic institution to which the academic program belongs.
Academic Program	Enter the academic program. This is the original academic program to which the applicants applied but into which they were not admitted. The process assigns the alternate evaluation code to any applicant who applied to this academic program—in the admit term you specify—and has a program action of <i>Deny</i>, <i>Waitlist</i>, or <i>Waitlist Offer Accepted</i>. If a student meets the above criteria but already has an application to the alternate program, the Alternate Averages process <i>does not</i> assign the alternate program code.
Admit Term	The process only assigns the alternate evaluation code to applicants who were denied or waitlisted in this term.

Click Run to run the Alternate Averages process at user-defined intervals.

Assigning Alternate Programs

This section discusses how to run the Alternate Programs process to assign alternate programs, and provides an example of how alternate programs are assigned to students.

Page Used to Assigning Alternate Programs

Page Name	Definition Name	Navigation	Usage
Alternate Program Addition	RUNCTL_ADALTPRG	Student Admissions, Processing Applications, Alternate Program Addition	Run the Alternate Programs process. The Alternate Programs process updates applications by comparing the minimum score that you enter on this page to the overall rating that the Evaluation Calculation process calculates. The Alternate Programs process uses the information that you define on this page to update information in the new application row.

Running the Alternate Programs Process

Access the Alternate Program Addition page (Student Admissions, Processing Applications, Alternate Program Addition).

Alternate Program Addition

Run Control ID: MARJO [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

*Institution:	PSUNV	PeopleSoft University
*Academic Career:	UGRD	Undergraduate
Alternate Evaluation Code:	ACT	ACT Test
*Rating Component:	1OVER	Overall Rating
*Rating Value:	27.0000	
*Approved Academic Load:	Full-Time	
*Academic Plan:	ART	
*Campus:	MAIN	
*Program Action:	ADMT	
*Update Eval Status:	IP	
Action Reason:	AUTO	Auto Assigned
*Admit Term:	0550	2005 Fall

Alternate Program Addition page

Note. Admissions application records use the Last Admit Term value to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table, (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Institution	Enter the academic institution for which you want to run the process.
Academic Career	Enter the academic career for the alternate academic program.
Alternate Evaluation Code	Enter the alternate evaluation code that is assigned to the applicants to be evaluated. The Alternate Programs process updates the applications of only those applicants who have been assigned this alternate evaluation code. Therefore, you must have already run the Alternate Eval Code process to assign applicants an alternate evaluation code. Define alternate evaluation codes on the Evaluation Table page.
Rating Component	Enter the rating component that you want to use to evaluate applicants. The rating component defines the format and meaning of the rating value. For example, in the preceding page shot, you selected the ACT rating component. The rating value therefore represents the minimum ACT score that can be admitted into the alternate program.
Rating Value	Enter the minimum score for consideration in the alternate program. The Alternate Programs process compares this score to the overall rating value that the Evaluation Calculation process calculates. If the overall rating value is equal to or more than the value you enter in this field, then the applicant is accepted into the alternate program. In the above example, the applicant must score at least 27 on the ACT to be accepted into the alternate program. See Chapter 36, "Creating Alternate Program Offers," Assigning Alternate Programs, page 1057. Note. After an applicant is accepted into the alternate program, the Alternate Programs process creates a new row in the person's application (adm_appl_prog) for the existing application number. The system assigns a new program number for the new program and plan into which the person was accepted.
Approved Academic Load	Select the academic load that you want the process to assign to anyone who meets the criteria defined on this page.
Academic Plan	Enter the academic plan that you want the process to assign to anyone who meets the criteria defined on this page.
Campus	Enter the campus that you want the process assign to anyone who meets the criteria defined on this page.
Program Action	Enter the program action that you want the process assign to anyone who meets the criteria defined on this page.

Update Eval Status (update evaluation status)

Enter the evaluation status that you want the process to assign to anyone who meets the criteria defined on this page.

Action Reason

Enter the action reason that you want the process to assign to anyone who meets the criteria defined on this page.

Admit Term

Enter the admit term that you want the system to assign to anyone who meets the criteria defined on this page.

In the above example, applicants to the undergraduate career at PSUNV with an alternate evaluation code of *ACT* and an ACT score of at least 27 will receive a program action of *Admit*.

Click Run to run the Alternate Programs process at user-defined intervals.

Viewing an Example of How Alternate Programs are Assigned to Students

The following person applied and was denied to the FAU program. Note that the program number is 0, the academic program is *LAU*, and the program action is *DENY*.

Biographical Details		Addresses		Regional		Application Program Data		Application Data	
Bill Harris				AD9200					
Academic Institution:		PeopleSoft University		Application Number:		00024329			
Academic Career:		Undergraduate		Career Number:		0			
Program Data Find View All First 1 of 2 Last									
Program Number:		0		Effective Date:		08/24/2006			
Admit Term:		0540 2005 Spr		Effective Sequence:		1			
Academic Program:		LAU Lib Arts		Expected Graduation Term:					
Academic Load:		Full-Time		Campus:		MAIN Main			
☐ Joint Program									
Program Status									
Status:		Cancelled		Action Date:		08/24/2006			
Program Action:		DENY Deny		Action Reason:		AUTO Auto Assigned			
Evaluation									
Plan Data Find View All First 1 of 1 Last									
Academic Plan:		ENGL-BA English (BA)		Major:		BA			
Sub-Plan Data Find View All First 1 of 1 Last									
Sub-Plan:									
Transfer To:		Education		Go					

Example Application Program Data page (1 of 2)

- First, you set up the Alternate Offer Table page, which enables applicants who were denied or waitlisted in LAU to be evaluated in FAU.

See [Chapter 36, "Creating Alternate Program Offers," Assigning Alternate Evaluation Codes, page 1055.](#)

- Then you run the Alternate Averages process (ADALTEVL.sqr).

See [Chapter 36, "Creating Alternate Program Offers," Selecting Applicants for Alternate Offers, page 1056.](#)

The Alternate Averages process assigns an alternate evaluation code (ACT) to the person's application, as illustrated in the following example. Access the Application Evaluation component by selecting Student Admissions, Application Evaluation, Application Evaluation.

Application Evaluation Overall Rating Committee Rating Evaluator Rating

Bill Harris ID AD9200

Academic Career: Undergraduate Application Nbr: 00024329

Prog Nbr: 1 Academic Program: Fine Arts Undergraduate

Find | View All First 1 of 1 Last

Evaluation Code: ACT ACT Test

Evaluation Nbr: 1

Recalculate Evaluation

Evaluation	Rating
Eval Stat: Progress	Committee Rating ID:
Eval Dt: 08/24/2006	Overall Rating ID: ACT

Comment:

Transfer To: Application Evaluator Ratings Go

Example Application Evaluation page

Note in the page above that the evaluation code now reads *ACT*.

- This new evaluation code has not been evaluated through the Evaluation Calculation process.

Therefore, you ran the Materials Extract process to extract the application data, and then you ran the Evaluation Calculation process to calculate the overall rating score based on the rating components for the ACT evaluation code.

See [Chapter 30, "Evaluating Applicants Using Automatic Processing," Linking Application Materials to Applications in Batch, page 986.](#)

See [Chapter 30, "Evaluating Applicants Using Automatic Processing," Calculating Rating Values Through an Automatic Process, page 987.](#)

- Next you run the Alternate Program process (ADALTPRG.sqr), which compares the minimum score that you enter on the Alternate Program Addition - Parameters page to the overall rating score that the Evaluation Calculation process calculates.

The applicant in our example was denied in his requested program (LAU), but was accepted into the alternate program (FAU), as illustrated in the following page shot. Maintain Applications is found by selecting Student Admissions, Application Maintenance, Maintain Applications.

Biographical Details		Addresses		Regional		Application Program Data		Application Data	
Bill Harris				AD9200					
Academic Institution:		PeopleSoft University		Application Number:		00024329			
Academic Career:		Undergraduate		Career Number:		0			
Program Data Find View All First 1 of 1 Last									
Program Number:		1		Effective Date:		08/24/2006			
Admit Term:		0540 2005 Spr		Effective Sequence:		1			
Academic Program:		FAU Fine Arts		Expected Graduation Term:					
Academic Load:		Full-Time		Campus:		MAIN Main			
☐ Joint Program									
Program Status									
Status:		Admitted		Action Date:		08/24/2006			
Program Action:		ADMT Admit		Action Reason:		AUTO Auto Assigned			
Evaluation									
Plan Data									
Academic Plan:		UNDECL-UG Undeclared Undergraduate		Major:					
Sub-Plan Data									
Sub-Plan:									
Transfer To: Education Go									

Example Application Program Data page (2 of 2)

Note that the program number is now *1*. The Alternate Programs process inserted a new row and incremented the program number by one. Thus, the program action of *DENY* for LAU still exists in the student's record. This new row contains the new academic program *FAU* (the alternate program) and note that the program action is *ADMT*. The Alternate Programs process also updated the remaining parameters that you selected on the Alternate Program Addition page, such as the action reason, campus, and academic load.

By evaluating this applicant in an alternate program, you were able to admit a person whom you would have otherwise denied.

Chapter 37

Updating Application Program Actions and Statuses

This chapter provides an overview of admissions program actions and statuses and discusses how to:

- Update the program action and status of one application.
- Update program actions and statuses of multiple applications.
- Update program actions and statuses using mass change.

Understanding Admissions Program Actions and Statuses

As applicants move through the admissions process, you must take action on their academic program and update their program status. You can update a single application, a group of applications, or you can use a mass change definition to update a large number of applications. When you enter new program actions, you will enter new effective dates. Thus, you can maintain a history of previous actions.

As you begin using program actions and statuses provided with Recruiting and Admissions, start with the most straightforward cases to become accustomed to the process. Then begin to work on the special cases, such as deferrals and reconsiderations.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the Program Action field on the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.

A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision*.

For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

<i>If you Select this Program Action:</i>	<i>The System Updates the Program Status to:</i>
Application Readmit Application Reconsideration	Applicant

<i>If you Select this Program Action:</i>	<i>The System Updates the Program Status to:</i>
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values require a substantial programming effort. You can, however, modify the *descriptions* of these values. Remember, however, that the altered description needs to retain its original meaning to avoid confusion.

The Program Status values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC - Active in Program
- AD - Admitted
- AP - Applicant
- CN - Cancelled
- DE - Deceased
- PM - Prematriculant
- WT - Waitlisted

Reviewing Admissions Program Action Definitions

The previous section details which admissions program actions set which program statuses. The chart below lists Program Action definitions and provides additional information about what happens when you choose a Program Action. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	After an action of reconsideration is taken, you can admit the applicant. You cannot take an action of <i>Admit</i> if the program status is <i>Cancelled</i> . You must first select a <i>Reconsideration</i> action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.

<i>Admissions Program Action</i>	<i>Explanation</i>	<i>Additional Steps or Requirements Caused by this Action</i>
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your application center setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a <i>Conditional Admit</i> action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	Same as for <i>Admit</i> .
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a <i>Cancelled</i> status from an <i>Admitted</i> or <i>Active</i> status.	When revoking admission for a person who has a current action of <i>Matriculation</i> , and therefore an <i>Active</i> status, you must go to Records and Enrollment to take this action on the Student Program/Plan component. When you revoke admission from Records and Enrollment, the Student program information is deleted and your application information is updated as <i>Cancelled Due to Admission Revocation</i> . If the person never had an action of matriculation, you can add an <i>Admission Revocation</i> action directly in PeopleSoft Recruiting and Admissions.
Deny	A person has been denied admission to an academic program.	None.

<i>Admissions Program Action</i>	<i>Explanation</i>	<i>Additional Steps or Requirements Caused by this Action</i>
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with <i>Before Decision</i> as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A <i>Waitlist Withdrawal</i> reason indicates someone who did not want to accept a place on the waitlist.	None.
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a <i>Prematriculant</i> status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of <i>First Deposit</i> .	None.

<i>Admissions Program Action</i>	<i>Explanation</i>	<i>Additional Steps or Requirements Caused by this Action</i>
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of <i>Matriculation</i> , you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. After you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

Updating the Program Action and Status of One Application

Use the Application Program Data page to update the program action and status of one application. If you only have *one* application to update, do so through the Maintain Applications component.

See Also

[Chapter 17, "Adding and Updating Applications," Entering Application Program Data, page 216](#)

Updating Program Actions and Statuses of Multiple Applications

This section discusses how to update program actions and statuses of multiple applications.

Page Used to Update Program Actions and Statuses of Multiple Applications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Action/Reason Entry	ADM_ACT_ENTRY	- Student Admissions, Application Evaluation, Application Decisions, Action/Reason Entry - Student Admissions, Application Maintenance, Action/Reason Entry	Update multiple applications to an identical program action and status. If you must update a <i>group</i> of applications which are for the same academic program and admit term with the same program action, it is faster to do so through this page, as opposed to one at a time on the Application Program Data page.

Updating Program Action and Status of Multiple Applications

Access the Action/Reason Entry page (Student Admissions, Application Evaluation, Application Decisions, Action/Reason Entry or Student Admissions, Application Maintenance, Action/Reason Entry).

Action/Reason Entry

Action/Reason Parameters					
Academic Institution:	PSUNV	PeopleSoft University	Program Action:	ADMT	Admit
Academic Career:	UGRD	Undergrad	Action Reason:		
Academic Program:	LAU	Lib Arts	Action Date:	10/31/2004	Seq: 1
Admit Term:	0550	2005 Fall			

Apply to Program Application			
Application Nbr	ID	Name	Prog Nbr
00022502	SF0140	Vickson, Sebastian	0
			Create Program

Program Data		Program Status	
Effective Date:	07/09/1998	Sequence:	0
Institution:	PeopleSoft University	Status:	Applicant
Acad Prog:	Law	Action Date:	07/09/1998
Admit Term:	1998 Fall	Prog Actn:	Applicatn
Campus:	Walnut Creek Campus	Action Rsn:	
Acad Load:	Full-Time		

Action/Reason Entry page

Note. Admissions application records use the Last Admit Term value to determine if the program should appear in the prompt. If the Last Admit Term field is populated on the Academic Program Table (ACAD_PROG_TBL), and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Admit Term	Enter an admit term. Admit terms are defined on the Term Values Table page.
Program Action	Enter the program action to be entered on the applications you are updating. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Action Reason	Enter an action reason to be entered on the applications if you have defined any reasons for this program action. Values for this field are defined in the Action Reason Table page.
Action Date	The default for the action date is your system date.
Seq (sequence)	If the action you are taking has the same date as the current action, enter a 1. Enter a 2 for another action on the same date. The default sequence is 0.
Application Number and ID	Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the ID field.

Program Number	Enter the program number if the application has multiple program numbers. When you navigate out of this page or click the Refresh button, you can verify that you have the correct person and application by reviewing the information displayed in the Program Data and Program Status group boxes.
Create Program	After entering an application number, click this button to update the program data for the application number that you enter. This button is only available to click if you entered a program action of <i>MATR</i> .
Calculate Deposits	Click this link to calculate deposits. The Calculate Deposits page appears. This link appears if you have entered a program action of <i>ADMT</i> and you have set up deposits for the application center.

Updating Program Actions and Statuses Using Mass Change

This section provides an overview of how to update program actions and statuses using mass change and discusses how to run the Application Program Update process.

Understanding Multiple Application Program Action and Status Updates

If you have a large number of applications you want to update with the same program action, action reason, and academic program status, you can use a background process.

To update program actions and statuses of multiple applications:

1. Set up your Mass Change Definition.

Use the Mass Change Definition - Description page to enter your mass change definition. The mass change definition defines the criteria for selecting which applications should be updated. PeopleSoft provides a sample mass change definition called *Application Program Update Select*. However, your institution might have defined its own mass change definition for updating program information, or your institution might have changed the shipped sample.

See *PeopleTools PeopleBook*

2. Specify your Mass Change Criteria and Defaults.

Use the Mass Change Definition - Criteria and Defaults page to set up your mass change criteria. You also choose the program action and action reason codes to be added to the selected application records. The system automatically updates the program status according to the action taken.

There is one SQL statement execution sequence for this Mass Change Definition: *Select Applicant Criteria*.

In the Defaults group box, select the codes you want added to the new program row for the selected applications. You may select values for program action and action reason. For example, you might be updating these applications with a program action of *DENY*, and an action reason of *AUTO*. These two fields are stored on the Application Program Data page.

3. Generate your SQL Statement to select the applications to be updated.

Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition. Click the Clear Sw button then the Generate SQL button so do this. After generating the SQL, select Save. After setting up your mass change definition and generating your SQL statement, you are ready to process your mass change.

4. Run a Mass Change Group to select the applications to be updated.

Use the Run Mass Change page to process your mass change and select the actual applications to be updated during the Application Program Update process. This process selects the actual applications to be updated.

Because you want to delete any data in the temp file before running this process, you can use a mass change group that PeopleSoft provides, which deletes the temp using the delivered Communication - Delete Temp mass change definition and runs your *Application Prog Update Select* mass change definition.

Select *Application Prog Update Base* in the Mass Change Group ID field. If you want to create a different Mass Change Group or modify *Application Prog Update Base*, use the Mass Change Group component before running the mass change group on Run Mass Change. On Run Mass Change, click the Execute Mass Change Group radio button to make the Mass Change Group ID field available for selection.

5. Run the Application Program Update process to do the actual updating of applications.

Use the Application Program Update page to update the program data of the selected applications. A new row of program data is added to the selected applications on the Application Program Data page.

Pages Used to Run the Application Program Update Process

Page Name	Definition Name	Navigation	Usage
Application Program Update	RUNCTL_PROGUPDT	Student Admissions, Processing Applications, Update Applications, Application Program Update	Update the program data of the selected applications. This process uses the applicants selected when running the mass change group to insert the program action and program reason defined on the Criteria and Defaults page of the Mass Change Definition component. You must first process your mass change group before running the application program update process.
Mass Change Definition	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Definition	Define criteria for applications to be updated.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Mass Change Group	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Group	Define the execution sequence for the mass change definitions.
Run Mass Change	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Run Mass Change	Run the mass change group to select the application to be updated via the application program update process.

Chapter 38

Managing Enrollment

This chapter provides an overview of enrollment management targets and discusses how to:

- Set up enrollment management.
- Perform enrollment management.
- Use enrollment management target templates.
- Generate enrollment management reports.

Understanding Enrollment Management Targets

This section discusses:

- Enrollment management targets.
- Cohort, population, and division.
- Examples of enrollment management targets.

Learning About Enrollment Management Targets

Enrollment Management is an extremely flexible feature. Although there are many ways in which your institution can use Enrollment Management, you must first think about how you want to set up and use this tool. By spending time now thinking about the design, you will save time later.

Because this feature is so flexible, we can only show you examples of how you might want to use it. There are virtually no rules, only possibilities. How you set up and design your enrollment management targets can be as simple or as complex as you want.

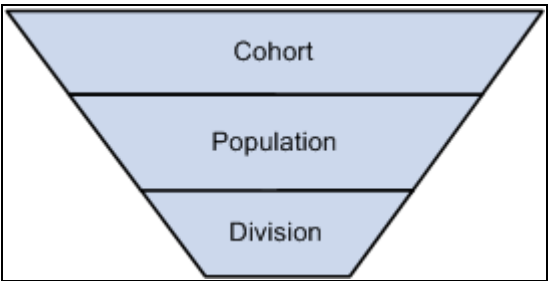
With Recruiting and Admissions, you can store the following types of enrollment management information:

- Target enrollment numbers.
- Actual enrollment numbers.

You can also group target enrollment numbers and actual enrollment numbers into levels that you define.

Learning About Cohort, Population, and Division

Enrollment management targets are set up using a three-level structure that consists of the following elements: cohort, population, and division. These terms can mean whatever you need them to mean. Cohort, population, and division are different levels, from highest to lowest, that you set up, define, link to one another and for which you set targets. They are conceptually similar to the three-level structure found in communications.



Enrollment Management Level Structure

Cohort is the highest of the three levels. The cohort is the starting point for your target development. An example of a cohort level that you can define is the entire group of students in an academic year. You can define a cohort level of 2005 and set an enrollment target of 500 students for that academic year. Alternatively, you can break this up into a cohort level for academic terms of Fall 2005 and Spring 2006.

Population is the next level down the hierarchy. You can define a population level by academic career. Alternatively, you can define a population level by school or college. It is entirely up to you how you define each level.

Division is the final bottom level in the enrollment management target setup. You can define a division level, for example, by gender, ethnicity, academic program, admit type, or program status. There are numerous options for how to break down and define enrollment management levels.

Viewing Examples of Enrollment Management Targets

The following examples illustrate how enrollment management targets can be set up.

Example 1 - One Detail

Suppose that the PeopleSoft University College of Engineering is concerned about enrolling more women. You want to conduct a recruiting effort to target women for the 2005 academic year. You might consider setting up the following enrollment management target to track your efforts. The following table shows a *detail* enrollment management target.

Detail Target	
Cohort	2005 Academic Year
Population	College of Engineering

Detail Target	
Division	Female
Target	200

Example 2 - Two or More Details (a Group)

Now, suppose that you want to break this down from the 2005 Academic Year into targets for each term, Fall and Spring. This is the place to introduce the idea of a *group* enrollment management target. In this case, you set up two detail enrollment management targets and join them as a group to form one group enrollment management target. Instead of one detail with a cohort for the entire academic year of 2005 (Example #1), now you have two detail targets defined; one with a cohort for each term and a target of 100 (Example #2). You can combine two or more details into one group enrollment target.

	Group Enrollment Management Target	
	Detail Target #1	Detail Target #2
Cohort	Fall 2005	Spring 2006
Population	College of Engineering	College of Engineering
Division	Female	Female
Target	100	100

Example 3 - More Details

The College of Engineering consists of four different academic programs: Mechanical Engineering, Chemical Engineering, Electrical Engineering, and Civil Engineering. In this example, you want each program to set its own targets, not just one overall target for the entire College of Engineering. Assume that you are setting the target for the entire 2005 Academic Year, and not by term this time. You can set up a group of four detail enrollment management targets, one for each program as follows:

	Group Enrollment Management Target			
	Detail #1	Detail #2	Detail #3	Detail #4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Chem. Eng.	Elect. Eng.	Civil Eng.

	Group Enrollment Management Target			
Division	Female	Female	Female	Female
Target	100	100	100	100

Example 4 - Complex Details

To add more complexity, suppose that the College of Engineering is concerned not only with enrolling more women, but also with enrolling other underrepresented minorities as well: African Americans, Native Americans, and Latinos. You want to set up enrollment management targets for all women and underrepresented minorities for the 2005 Academic Year for each of the four academic programs within the College of Engineering. That is 16 different enrollment management target details. Here is one way that you could set this up:

	Detail 1	Detail 2	Detail 3	Detail 4
Cohort	2005	2005	2005	2005
Population	Mech. Eng.	Mech. Eng.	Mech. Eng.	Mech. Eng.
Division	Female	African American	Latino	Native American
Target	100	100	100	100
	Detail 5	Detail 6	Detail 7	Detail 8
Cohort	2005	2005	2005	2005
Population	Chem. Eng.	Chem. Eng.	Chem. Eng.	Chem. Eng.
Division	Female	African American	Latino	Native American
Target	50	50	50	50
	Detail 9	Detail 10	Detail 11	Detail 12
Cohort	2005	2005	2005	2005
Population	Elect. Eng.	Elect. Eng.	Elect. Eng.	Elect. Eng.

	<i>Detail 1</i>	<i>Detail 2</i>	<i>Detail 3</i>	<i>Detail 4</i>
Division	Female	African American	Latino	Native American
Target	25	25	25	25
	Detail 13	Detail 14	Detail 15	Detail 16
Cohort	2005	2005	2005	2005
Population	Civil Eng.	Civil Eng.	Civil Eng.	Civil Eng.
Division	Female	African American	Latino	Native American
Target	20	20	20	20

In the preceding example, a group enrollment target that you define might consist of *all* 16 of the detail targets, but it does not have to. You can, for example, set up a group of the horizontal detail targets in the above table, or a group of the vertical detail targets. It all depends on what you want to do with the information, and how you want to access it and report on it. There are several possible ways to use the enrollment management targets as tools in your recruiting efforts.

Setting Up Enrollment Management Targets

To set up enrollment management targets, use Enrollment Target Division component (TARGET_DIV_TABLE), Enrollment Target Population (TARGET_POP_TABLE), and the Enrollment Target Cohort component (TARGET_COH_TABLE).

This section explains how to define for enrollment management the following items:

- Divisions
- Populations
- Cohorts

Start by defining divisions and then define populations and cohorts, because you attach divisions and populations to cohorts.

Pages Used to Define Divisions, Populations, and Cohorts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Target Division Table	TARGET_DIV_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Division, Target Division Table	Define a division.
Target Population Table	TARGET_POP_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Population, Target Population Table	Define a population enrollment management target.
Enrollment Target Cohort	TARGET_COH_TABLE	Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Cohort	Define a cohort enrollment management target.

Defining a Cohort

Access the Enrollment Target Cohort page (Set Up SACR, Product Related, Recruiting and Admissions, Enrollment Targets, Enrollment Target Cohort).

Enrollment Target Cohort

Cohort: F 2002

***Description:**

***Short Description:**

Find | View All First 1 of 9 Last

***Population:** All Programs

Find | View All First 1-3 of 5 Last

***Division**

African American

All Programs

Female

Enrollment Target Cohort page

After you set up your divisions and populations, you set up the cohort. As an example, set up an enrollment target level that tracks the enrollment of women, in all university programs, for the Fall 2002.

Population

Enter the populations that you want to attach to this cohort. In this example, you attached the population of *All Programs* to the *Fall 2002* cohort. You can attach multiple populations to a cohort. Define populations on the Target Population Table page.

Division

Enter the divisions that you want to attach to this cohort. In our example, you attached the *African American*, *Female*, and *All Program* divisions to the *Fall 2002* cohort. You can attach multiple divisions to a cohort. Define divisions on the Target Division Table page.

Performing Enrollment Management

This section discusses how to:

- Define enrollment management targets.
- Set additional target details.
- Process enrollment management targets.
- Display enrollment management target results.
- Display target results with the Enrollment Management Summary page.

Pages Used to Perform Enrollment Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Target	ENRL_MGMT_TARGET	Student Admissions, Enrollment Targets, Define Enrollment Targets, Enrollment Target	Set enrollment targets for each level that you defined.
Target Detail	ENRL_MGMT_DETAIL	Student Admissions, Enrollment Targets, Define Enrollment Targets, Target Detail	Specify additional details about a target.

Page Name	Definition Name	Navigation	Usage
Target Applicants	ENROLL_MGMT_ID	Student Admissions, Enrollment Targets, Define Enrollment Targets, Target Applicants	Display a list of all the people that meet the target selection criteria. The Enrollment Target process populates the values in this page. A list of people who meet your target selection criteria appears on the bottom section of the page. For each person, it displays the ID, name, application number, program number, and the number of times that person is counted for this detail or group. If you are displaying a detail target, then this field is always 1. If you are displaying a group target, then this number could be anything depending on the number of times the person met the criteria for each detail target within the group.
Calculate Enrollment Targets	RUNCTL_ENRL_TARGET	Student Admissions, Enrollment Targets, Calculate Enrollment Targets	Process the enrollment management target and obtain current results. After you have set up and defined your enrollment management target levels, you can run the Enrollment Target process at any time to obtain the results and see how your institution is doing with its efforts towards these targets.
Enrollment Target Summary	ENROLL_TARGET_SUMM	Student Admissions, Enrollment Targets, Enrollment Target Summary, Enrollment Target Summary	View enrollment management target results.

Defining Enrollment Management Targets

Access the Enrollment Target page (Student Admissions, Enrollment Targets, Define Enrollment Targets, Enrollment Target). You must have already defined cohorts, populations, and divisions.

Enrollment Target		Target Detail		Target Applicants	
Target Sequence Nbr:			000380		Delete Target Detail
Group / Detail Information					
☒ Group	*Cohort:	F2002	Fall 2002	Target / Real:	100 / 0
☒ Detail	*Population:	LAU	LAU	Result / Actual:	0 / 0
		Division:	FEMALE	Result DateTime:	
Select Prog					
☒ Current					
☐ All					
Comment:		Undergraduate Liberal Arts Female students with a current status of applicant for Fall 2002			
Group Detail Selection Find View All First 1 of 1 Last					
Detail Sequence:					
Detail Find View All First 1 of 1 Last					
*Institution:		PSUNV	PSU	*Career:	UGRD Undergrad
*Term:		0475	2002 Fall		

Enrollment Target page

Group/Detail Information

Group	Select this option to set up a group enrollment management target consisting of multiple detail targets.
Detail	Select this option to set up a detail enrollment management target. This is the default setting.
Cohort	Select the cohort for this enrollment management target.
Population	Enter the population for this enrollment management target.
Division	Enter the division for this enrollment management target.
Target	Enter the target number for this enrollment management target.
Result	After you run the Enrollment Target process, this field displays the total number of application rows meeting the target selection criteria.
Actual	After you run the Enrollment Target process, this field displays the total number of people meeting the target selection criteria. If it is a detail row, the Actual field contains the same number as the Result field.

Real

After you run the Enrollment Target process, this field displays the same value as the Result field. For group targets, you can change this field to any number between (and including) the result and actual number.

For example, suppose that for a group target of Fall 2005 undergraduate enrollment, the Result field displays *100*. However, suppose that some of these people applied for two or more programs. Therefore, the Actual field displays *80*. The Real field defaults to *80* but you can change it to any number within that range that is appropriate, for example, *90*. You can use the Target Applicants page to view a list of the people who meet your target selection criteria and verify the correct *real* number. You can also use the Enrollment Management Summary page to view results.

Result Date/Time

After you run the Enrollment Target process, the date and time the most recent results were calculated for this enrollment target appear.

Select Prog

Choose an application program setting:

Current

Select this option to have the Enrollment Target process check only the most current application row. If a student is in this application program, and matches the target selection criteria, he or she is included in the count.

All

Select this option to have the Enrollment Target process check all the application rows. If a student has any application program row that matches the target selection criteria, he or she is included in the count.

For example, suppose that a person has applied to the LAU academic program as illustrated in the following table:

<i>Program</i>	<i>Effective Date</i>	<i>Status</i>
LAU	03/01/05	Admitted
LAU	01/01/05	Applied

You create an enrollment target detail in which the program is *LAU* and the status is *Applied*, then:

If you select the All option, the student is included in the enrollment target count on 3/01/05.

If you select the Current option, the student is *not* included in the enrollment target count on 3/01/05. The student's most current application program status (highest effective date) is *Admitted*.

Group Detail Selection

Detail Sequence

Use this field only if you are creating a group enrollment management target that consists of a series of detail targets. You would select all the detail targets here.

Detail

Career

Enter the academic career for this enrollment management target.

Term

Enter the term for this enrollment management target.

Setting Additional Target Details

Access the Target Detail page (Student Admissions, Enrollment Targets, Define Enrollment Targets, Target Detail).

Enrollment Target	Target Detail	Target Applicants
Target Sequence Nbr: 000380		
Target Criteria Find View All First 1 of 1 Last		
Institution: PSUNV Career: Undergrad Term: 0475		
Selection Criteria		
☐ Admit Type ☒ Program Status ☒ Academic Program ☒ Gender ☐ Ethnic Group		
Admit Type Criteria Find View All First 1 of 1 Last		
*Admit Type:		
Status Criteria Find View All First 1 of 1 Last		
*Status: Applicant Applicant		
Academic Program Criteria Find View All First 1 of 1 Last		
*Acad Prog: LAU Liberal Arts Undergraduate		
Gender Criteria Find View All First 1 of 1 Last		
*Gender: Female Female		
Ethnic Group Criteria Find View All First 1 of 1 Last		
*Ethnic Group		

Target Detail page

In the Selection Criteria group box, select any additional criteria that you want to use to define your target. These are selection criteria beyond the academic institution, academic career, and academic term that you defined on the Enrollment Target page. The specific cohort, population, and division should drive the selection of any of these fields.

Note. Admissions application records use the Last Admit Term value to determine if the program, plan, or subplan should appear in the prompt. If the Last Admit Term field is populated on the Academic Program Table (ACAD_PROG_TBL), Academic Plan Table (ACAD_PLAN_TBL), or Academic SubPlan Table (ACAD_SBPLN_TBL) and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Admit Type	Select this check box if you want to define your target by admit type. After you select this check box, the Admit Type field becomes available for input.
Program Status	Select this check box if you want to define your target by program status. After you select this check box, the Status field becomes available for input.
Academic Program	Select this check box if you want to define your target by academic program. After you select this check box, the Acad Prog (academic program) field becomes available for input.
Gender	Select this check box if you want to define your target by gender. After you select this check box, the Gender field becomes available for input.
Ethnic Group	Select this check box if you want to define your target by ethnic group. After you select this check box, the Ethnic Group field becomes available for input.

If this detail comprised your entire enrollment management target, then you have completed all the necessary data entry. Remember to save the page. If you are creating a group enrollment management target and this was just one detail target, display the Enrollment Target page again and specify your additional detail targets. Use the Group - Detail Selection field to find all the detail targets that you must specify (roll up into) the group enrollment management target.

Note. The Target Applicants page displays only the list of students meeting the selection criteria *after* you have run the Enrollment Target process.

Processing Enrollment Management Targets

Access the Enrollment Target page (Student Admissions, Enrollment Targets, Define Enrollment Targets, Enrollment Target). You must first set up the target detail on the Enrollment Target and Target Detail pages.

Cohort	Select the cohorts for which you want to process enrollment management targets.

Click Run to run the Enrollment Target process at user-defined intervals.

Displaying Enrollment Management Target Results

After you have run the Enrollment Target process, you can display the results to see how your institution is progressing with its recruiting efforts towards the target. There are two ways that you can obtain enrollment management target information:

- Through the Enrollment Target page.

After you have run the enrollment management target process for a specific enrollment management target, you can use the Enrollment Target page to display the calculated enrollment figures.

- Through the Enrollment Management Summary page.

See Also

[Chapter 38, "Managing Enrollment," Setting Up Enrollment Management Targets, page 1079](#)

Displaying Target Results with the Enrollment Management Summary Page

Access the Enrollment Target Summary page (Student Admissions, Enrollment Targets, Enrollment Target Summary, Enrollment Target Summary). You must first run the Enrollment Target process.

Enrollment Target Summary								
Selection Criteria								
Cohort:	F2002		Fall 2002	Population:				
Division:				Group / Detail:			Search	
Customize Find View All First 1-7 of 45 Last								
	Seq Nbr	Cohort	Population	Division	Target	Result	Real	Result DateTime
1	000250	Fall 2002	Non-Degree Seeking	African American	25	0	0	
2	000260	Fall 2002	Non-Degree Seeking	Female	100	0	0	
3	000270	Fall 2002	Non-Degree Seeking	Latino	25	0	0	
4	000280	Fall 2002	Non-Degree Seeking	Native American	25	0	0	
5	000290	Fall 2002	Non-Degree Seeking	All Programs	200	0	0	
6	000300	Fall 2002	Non-Degree Seeking	Freshmen	100	0	0	
7	000310	Fall 2002	Undergraduate Fine Arts	African American	25	0	0	

Enrollment Target Summary page

Entering Selection Criteria

Cohort, Population, and Division	Select the cohort, population, and division for which you want to display targets.
Search	Click to display the specified target results.

Viewing Results

The bottom section of the page displays the target results in the following columns:

Seq Nbr (sequence number)	The target sequence number.
Cohort	The defined cohort.
Population	The defined population.
Division	The defined division.
Target	The target number you originally set for this enrollment management target.
Result	The current result count for this target.
Real	The current real count for this target.
Result Calculated Date/Time	The most recent date and time these results were last calculated.

Using Enrollment Management Target Templates

Use the Enrollment Management Template feature to easily create new targets by copying the details that you want from existing targets. Using templates makes the process of creating enrollment management targets much simpler. For example, you might have to set up a target detail enrollment for the next term that is identical in all other respects as a target detail for this term. Alternatively, you might want to have the same detail and group targets as last academic year but you must have a different target number. The target template feature can manage this, so that you do not have to set up the target details from the beginning.

Use the Target Detail Template component to define and use enrollment management templates.

To create enrollment targets using a template:

1. Enter new target details.
2. Specify the detail from which you are copying.

This section discusses how to select the target information from the old detail.

Pages Used to Use Enrollment Management Target Templates

Page Name	Definition Name	Navigation	Usage
New Target Detail	TARGET_DETAIL_NEW	Student Admissions, Enrollment Targets, Target Detail Template, New Target Detail	Create new enrollment management targets using the target template feature.
Copy Target Detail	TARGET_DETAIL_COPY	Student Admissions, Enrollment Targets, Target Detail Template, Copy Target Detail	Specify the target information you are copying from for the new detail target.

Selecting the Target Information from the Old Detail

Access the Copy Target Detail page (Student Admissions, Enrollment Targets, Target Detail Template, Copy Target Detail).

Copy Target Detail

Target Sequence Nbr: 000000

Copy From

Detail Sequence: 000160

Cohort: 1999 Academic Year

Population: Civil Engineering

Division: Latino

Copy to Detail Find | View All First 1 of 1 Last

Academic Institution:

Academic Career:

*Term: 0410

Copy Target Detail page

Detail Sequence

Select the detail sequence number of the detail from which you are copying. The system displays the corresponding cohort, population, and division, if applicable.

Term

Select the term for the new detail you are creating.

Copy

Click to copy the detail template from the old to the new target.

After you save the page, you can display the new detail template and change only the items you have to for the new target, rather than recreating everything from scratch.

Generating Enrollment Management Reports

This section discusses how to generate three different enrollment management reports:

- Enrollment Target Cohort Table.
- Target Population Table.
- Target Division Table.

Pages Used to Generate Enrollment Management Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Enrollment Target Cohort	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Cohort	Create a report listing the enrollment target cohort levels you have defined.
Enrollment Target Population	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Population	Create a report listing the enrollment target population levels you have defined.
Enrollment Target Division	PRCSRUNCTL	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Division	Create a report listing the enrollment target division levels you have defined.

Chapter 39

Loading and Assigning EPS Market Codes

This chapter provides an overview of Enrollment Planning Service (EPS) market codes and discusses how to:

- Set up code types for EPS organizations.
- Load EPS market codes.
- View EPS load results.
- Assign EPS market codes to an organization.
- Purge EPS market codes.

Understanding EPS Market Codes

EPS™ (Enrollment Planning Service) is a geographic and demographic data service offered annually by the College Board to Colleges and Universities. EPS provides information to subscribing institutions about competitors, feeder schools, and demographic strengths and weaknesses. EPS market codes are proprietary market codes owned by the College Board and are used to categorize external organizations and people into geographical areas, mostly in the United States. Some admissions offices use EPS market codes to focus their recruiting efforts in geographic areas in which they believe they will be the most successful. Note that there is a license agreement that you must sign with the College Board to use the EPS geomarket data. However, an institution is not required to purchase EPS to use the PeopleSoft EPS market code functionality.

PeopleSoft Campus Solutions does not provide EPS data; however, it does provide an EPS market code load process and lets you automatically assign the market codes to external organizations.

Setting Up Code Types for EPS Organizations

This section discusses how to set up external organization code types.

Page Used to Set Up Code Types for EPS Organizations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
External Organization Code Type	EXTORGCDTYPE_TABLE	Campus Community, Organization, Define Organization Data, Ext Org Code Type Table, External Organization Code Type	Define an EPS market code organization code type. When you load EPS data, the EPS External Load process links the EPS data to the external organization code types that you define. Thus, you identify EPS data by the external organization code type to which you link the data.

Setting Up External Organization Code Types

Access the External Organization Code Type page (Campus Community, Organization, Define Organization Data, Ext Org Code Type Table, External Organization Code Type).

Code Type Option

Select *EPS* if the external organization code type that you are adding is an EPS market code type. If the code you are adding is *not* an EPS market code, select *None*.

Loading EPS Market Codes

You can load EPS market codes via the EPS External LoadParms (EPS external load parameters) page. You can then view the load results and correct any errors. This section discusses how to run the EPS External Load process.

Page Used to Load the EPS Market Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Load External Data	EPS_LOAD_PARMS	Campus Community, Organization, Organizations Data Load, EPS Load External Data	Run the process to load the EPS market codes for the external organization code type that you defined.

Running the EPS External Load Process

Access the EPS Load External Data page (Campus Community, Organization, Organizations Data Load, EPS Load External Data).

EPS Load External Data

Run Control ID: MARJO

[Report Manager](#) [Process Monitor](#) Run

EPS Data Load Options

☒ Load EPS Data

EPS Code Type: QA1

QA1

Input File: \\MFONTAIN040502\TEMP\EPSSH97.dat

EPS Data Delete Options

☐ Delete EPS Data

☒ All

☐ Specific Type EPS Code Type:

EPS Load External Data page

EPS Data Load Options

- Load EPS Data

Select to *add* EPS data to your system. You must select either the Load EPS Data check box or the Delete EPS Data check box.
- EPS Code Type

Select the EPS code type that you want to load. Only EPS code types that you defined on the Ext Org Code Type Table page are available for selection.
- Input File

Enter the drive, directory, and filename path where the EPS market code external data resides.

EPS Data Delete Options

- Delete EPS Data

Select if you want to *delete* EPS data. You might perform this action, for example, if you want to remove the previous year's version of the EPS data.
- All

Select to remove all EPS data.
- Specific Typeand EPS Code Type

Select Specific Type to delete a specific EPS data type. Then choose an EPS Code Type.

Click the Run button to run the EPS External Load process at user-defined intervals. The process name is CCEPSLOD and the process type is SQR Report.

Viewing EPS Load Results

This section discusses how to view the following data related to the EPS load process:

- Zip codes
- Market codes
- Error messages
- Suspense messages
- All messages

Pages Used to View EPS Load Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Zip to Market Code	EPS_ZIP_MRKT_TABLE	Campus Community, Organization, Define Organization Data, EPS Zip to Market Code	View the zip code that is related to the market code. After running the EPS Load External Data process, the EPS data is populated into the EPS Zip to Market Code table.
EPS Market Code Table	EPS_MRKT_CD_TABLE	Campus Community, Organization, Define Organization Data, EPS Market Code Table	View or update the EPS market codes that you loaded through the load process.
EPS Suspense Data	EPS_SUSP_DATA	Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Data	View any error messages that may result from the EPS load process.
EPS Suspense Message	EPS_SUSP_MESSAGE	Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Message	View the EPS suspense error messages.
EPS Messages	EPS_MESSAGE_TABLE	Campus Community, Organization, Organization Data Load, EPS Messages	View all of the messages generated by the EPS External Load process.

Viewing EPS Zip Codes Loaded Through the Load Process

Access the EPS Zip to Market Code page (Campus Community, Organization, Define Organization Data, EPS Zip to Market Code).

EPS Zip to Market Code

EPS Zip to Market

*Ext Org Code Type:

QA1

QA1

*Postal:

01000

*Market Name:

0AL-

*Market Code:

4Abb

EPS Zip to Market Code page

Market codes can be linked to many external organization code types. You can view market code descriptions on the EPS Market Code Table page.

Viewing EPS Market Codes Loaded Through the Load Process

Access the EPS Market Code Table page (Campus Community, Organization, Define Organization Data, EPS Market Code Table).

Viewing EPS Load Process Error Messages

Access the EPS Suspense Data page (Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Data).

EPS Suspense Data

EPS Suspense Message

Ext Org Code Type:

NATIONAL

☐ Delete

Record Nbr:

1

Postal Place Indicator:

Add

Postal:

01000

Market Name:

0AL-

Market Code:

4Abb

☒ Duplicate Ind

Status

☐ OK to Purge

☐ Completed

☒ Error

EPS Suspense Data page

Delete

Select to mark this suspense record for deletion. The system deletes the record when you run the EPS Purge Suspense File process.

Duplicate Ind (duplicate indicator)

The load process selects this check box when it finds a duplicate postal code, market name, and market code within the code type.

Status

OK to Purge

Select to mark the record for purge. When you run the EPS Purge Suspense File process, this record is purged.

Completed

The load process selects this option when the record has been successfully updated.

Error

The load process selects this option when it encounters an error, such as a duplicate. The system indicates duplicates by selecting the Duplicate Ind check box. You can decide whether to delete a duplicate record by selecting the Delete check box, or to ignore the duplication by clearing the Duplicate Ind check box.

Viewing EPS Suspense Messages

Access the EPS Suspense Message page (Campus Community, Organization, Organization Data Load, EPS Suspense, EPS Suspense Message).

EPS Suspense Data		EPS Suspense Message	
Ext Org Code Type:	NATIONAL	Postal Place Indicator:	Add
Postal:	01000	Record Nbr:	1
Message Details		Find View All First 1 of 1 Last	
Run Date/Time:	09/20/2004 1:56:50PM	Process Instance:	276
User ID:	PS	Process Name:	CCEPSLOD
Message Set Number:	14200	Message Number:	226
Message Severity:	Error		
Message Text:	Duplicate postal codes encountered in EPS input data.		
Description:	Duplicate data can result in incorrect data in the EPS Zip to Market Data table. Review the result and correct as necessary.		
Comments:	Postal Code: '01000' EPS Market Name: '0AL- ' EPS Market Code: '4Abb'		

EPS Suspense Message page

Viewing All Messages Generated from Loading EPS Market Codes

Access the EPS Messages page (Campus Community, Organization, Organization Data Load, EPS Messages).

EPS Messages

Code Type:

Postal:

Process Instance:

Postal Place:

Add

Record Nbr:

Search

Message Details

Find | View All

First 1 of 1 Last

Record Nbr:

Process Instance:

Run Date/Time:

Process Name:

User ID:

Message Number:

Postal:

Postal Place:

Message Set Number:

Message Severity:

Message Text:

Description:

Comments:

EPS Messages page

- Code Type, Postal, Process Instance, Postal Place, and Record Nbr(record number)

Search

Use these fields to narrow the selection of messages that you want to display.

Click to display the messages based on your search.

Assigning EPS Market Codes to an Organization

This section discusses how to:

- Assign market codes.
- View and maintain the organization external codes.

Pages Used to Assign EPS Market Codes to an Organization

Page Name	Definition Name	Navigation	Usage
EPS Assign Organization	EPS_ASGN_ORG_PARMS	Campus Community, Organization, Organization Data Load, EPS Assign Organization	Assign EPS market codes to external organizations.
External Organization Codes	EXT_ORG_CODES	Campus Community, Create/Maintain Organizations, External Organization Codes, External Organization Codes	Display the results of the automated EPS assignment process for a specific external organization. You can also use this page to maintain the EPS market code data for the institution.

Assigning Market Codes

Access the EPS Assign Organization page (Campus Community, Organization, Organization Data Load, EPS Assign Organization).

EPS Assign Organization

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

EPS Delete Option

☒ Delete EPS Data Type EPS Code Type: marjo

EPS Assign Option

☐ Assign EPS Data Type EPS Code Type:

Dup Org EPS Type Operation: ☒ Skip ☐ Replace

Org Selection Criteria

☐ Assign EPS Code to All Org School Type:

Address Selection

Country: State:

Postal Code

☐ Begins With ☐ Equals ☐ Range ☒ N/A

From: To Qty:

EPS Assign Organization page

EPS Delete Option

Delete EPS Data Type and EPS Code Type Select to delete EPS data. Select the EPS code type to delete. Use this action, for example, to remove a prior year's version of the EPS data.

EPS Assign Options

Assign EPS Data Type and EPS Code Type Select to assign EPS data to organizations. Select the EPS code type to assign.

Skip Select if you *do not* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Replace Select if you *do* want to assign an EPS market code to this organization if this organization already has this EPS market code assigned.

Org Selection Criteria

Assign EPS Code to All Org (assign enrollment planning service code to all organizations) Select to assign EPS market codes to all external organizations. If you select this check box, the School Type field and the fields in the Address Selection group box become unavailable for input.

School Type Select the school type to which you want to assign EPS market codes. If you want to select organizations by using the address fields below, do not select the Assign EPS Code to All Org check box. Instead, select a school type (such as *Secondary*).

Address Selection

Use this group box to assign EPS market codes to organizations based on address criteria.

Country and State Enter the country and state to select external organizations.

Postal Code

Use this group box if you want to select external organizations from a certain postal code or postal code range. Select the appropriate option depending on how you want to select by postal code. Select one option only.

Begins With	Select to choose an organization by a beginning postal code. Enter the beginning postal code in the From field. For example, suppose that one organization has had a 5-digit postal code entered (90068) and one organization has a 9-digit version of the postal code entered (90068-6328). Using a postal code that begins with 90068 will find both organizations.
Equals	Select to choose an organization by a specific postal code. Enter the postal code in the From field.
Range	Select to choose an organization by a postal code range. Enter the beginning postal code in the From field and the ending postal code in the To field.
N/A	Select if you do not want to use postal codes in your selection criteria for the organization. This is the default setting.

Click the Run button to run the EPS Assign Organization process at user-defined intervals.

Viewing and Maintaining the Organization External Codes

Access the External Organization Codes page (Campus Community, Create/Maintain Organizations, External Organization Codes, External Organization Codes).

External Organization Codes

Org ID:000010021Williamsport High School

Organization Code Types

Find | View AllFirst1 of 1Last

*Ext Org Code Type:

EPS Information

EPS Postal Code:

EPS Market Code:

EPS Market Name:

External Organization Codes page

Ext Org Code Type (external organization code type)	Enter the external organization code type. If this external organization code type is an EPS code type, then the EPS Postal Code field becomes available for selection (if the external organization code type is not an EPS code type, then the EPS Postal Code field displays but you cannot edit or change this field).

EPS Postal Code Enter the EPS postal code. You can change this field no matter what the assignment process did.

EPS Market Code and EPS Market Name After you enter an EPS postal code, the system displays the EPS Market Code and EPS Market Name from the setup tables. This data cannot be changed on this page.

Purging EPS Market Codes

This section discusses how to purge EPS suspense files.

Page Used to Purge EPS Market Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EPS Purge Suspense File	EPS_PURGE_PARDS	Campus Community, Organization, EPS Purge Suspense File	Purge EPS code records from the suspense file. You can purge all EPS codes or a specific type.

Purging EPS Suspense Files

Access the EPS Purge Suspense File page (Campus Community, Organization, EPS Purge Suspense File).

EPS Purge Suspense File

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

EPS Code Type

☐ All Type

☒ Specific Type Purge Code Type: 

Purge Suspense Record Status

☐ All

☐ OK to Purge

☐ Completed

☐ Error

EPS Purge Suspense File page

EPS Code Type

Use this group box to select the EPS market code records that you want to purge from the suspense file.

All Type Select to purge all EPS market code type records from the suspense file.

Specific Type and Purge Code Type Select to purge only a specific EPS market code type record from the suspense file. Use Purge Code Type to choose an EPS market type.

Purge Suspense Record Status

Use this group box to select the type of messages that you want to remove. You must choose at least one.

All Select to remove all suspense records, regardless of their status.

OK to Purge Select to remove all suspense records with a status of *OK to Purge*.

Completed Select to remove all suspense records with a status of *Completed*.

Error Select to remove all suspense records with a status of *Error*.

Click the Run button to run the EPS Purge Program process at user-defined intervals.

Chapter 40

Deleting Prospect and Applicant Information

This chapter provides an overview of the prospect and application deletion processes, lists common elements, and discusses how to:

- Delete prospect records.
- Delete applications.

Understanding the Prospect Delete and Application Delete Processes

You can only delete prospect records and applications for which you have appropriate recruiting center and application center security.

See *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*, "Securing Recruiting and Admissions."

You can delete prospect records and applications:

- Individually
- In a group

Use the group delete process to delete groups of prospect records or applications that you no longer want to keep in your database—for example, once a semester, you might delete all prospect records that are five years old and for which no application exists. You might use the individual delete process at the end of each day, to delete prospect records or applications entered in error.

You can delete *all* academic career information for prospects or applicants or only information for a *specific* academic career, when multiple careers exist. In either case, the processes delete prospect or applicant data from all tables in which the data resides.

You also have the option to delete the communications, checklists, and comments (3Cs) associated with the prospect record or application.

Before running the delete process, you can access the holding table to remove records that you no longer want to delete or to change the 3Cs that you want to delete.

Important! The Prospect Delete and Application Delete processes are designed strictly as cleanup tools. They are *not* to be used to delete an ID from the database. PeopleSoft Campus Community has the ID Delete function for that task.

How Prospect Delete and Application Delete Relate to ID Delete

Although the Prospect Delete and Application Delete processes remove prospect records and applications from database tables, the identification number and personal data still remain in the system. If you need to delete this information, use the ID Delete functionality.

The ID Delete process, because of its primary objective to maintain referential integrity, searches for the presence of critical data in high-level tables before it deletes individual identification numbers. If it finds no data for the identification number, it proceeds with the deletion. However, if it does find data, it cancels the deletion and displays a message of explanation.

The Prospect Delete and Application Delete processes prepare records for ID Delete when:

- No other prospect record or application exists.
- No student record exists for a matriculated applicant or active student.
- No student financial record exists.

When you create prospect records and applications, the system writes a corresponding row to the STDNT_CAREER table for each career of the prospect or applicant. The STDNT_CAREER table is one of the control tables that the ID Delete process searches before it deletes an identification number. To ensure that you can delete an identification number after a corresponding prospect record or application is deleted, the Prospect Delete and Application Delete processes check for critical data elements to determine if the identification number for the prospect or applicant meets certain conditions. If the identification number meets those conditions and if it meets all the requirements of the ID Delete feature, then the processes delete the identification number from the STDNT_CAREER table and the identification number becomes eligible for ID delete.

Likewise, when your institution processes application fees and enrollment deposits, the system writes a corresponding row to the ITEM_SF table, and this data flows up to the ACCOUNT_SF table (one of the four control tables in the ID Delete feature). In the ITEM_SF table, the Applicant Delete process changes the Application Number Deleted field from *No*, the default, to *Yes*.

The Prospect Delete and Application Delete processes remove data from the ID Delete control tables only if the data came from Recruiting and Admissions processes. They do not remove data that originated from other applications in PeopleSoft Campus Solutions.

See Also

PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, "Managing System IDs," Deleting Individual IDs

Common Elements Used in This Chapter

This section lists common elements.

3Cs

You can delete the 3C information that is associated with prospect and application records.

**Delete Communications,
Delete Checklists, and Delete
Comments**

Select the appropriate check boxes to delete any associated 3Cs that are assigned to prospect or application records.

Only 3Cs with the administrative functions PSSV, PROS, or PROP for prospect records and ADMA or ADMP for applications, where the variable data matches the prospect or application record, will be deleted.

By Population

The By Population group box appears when the Population Selection process is selected. The population selection process is a method for selecting the IDs to process for a specific transaction. The By Population group box functions in the same way as the Population Selection group box, which is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction.

Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process, and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Campus Community 9.0 Fundamentals PeopleBook*, "Using the Population Selection Process."

Selection Tool

Select a tool to create the group of prospect records that you want to delete. Values are: *Equation Engine*, *External File*, and *PS Query*. The fields in this group box change depending on your selection.

Query Name

A number of queries are delivered with the PS Query tool. If you run queries other than those that are delivered, you must include the appropriate bind record in your query or it will not appear when you select the prompt to view the available queries.

The bind record for prospect delete is SAD_PRS_DEL_BND. Your query must also contain the following values: EMPLID, INSTITUTION and ACAD_CAREER.

The bind record for application delete is SAD_APP_DEL_BND. Your query must also contain the following values: EMPLID and ADM_APPL_NBR.

Click the Preview Selection Results link to verify that the records that you selected are the ones that you want to delete. Click the Run button to insert the records into the Prospect Delete Holding table or into the Application Delete Holding table.

Adding Multiple Rows

Save data entry time by adding multiple rows.



Click to add multiple rows. Unused rows are deleted when you save.

Deleting Prospect Records

This section discusses how to:

- Select individual prospect records to delete.
- Select a group of prospect records to delete.
- View the Prospect Delete Holding (ADM_PRS_DEL_SUSP) table.
- Run the Prospect Delete SQR (ADPRSDEL) process.

Pages Used to Delete Prospect Records

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delete Prospect Record	SAD_PRS_DELETE	Student Recruiting, Delete Prospects, Delete Prospect Record	Select individual prospect records for deletion.
Prospect Delete by Batch	SAD_PRS_DEL_BATCH	Student Recruiting, Delete Prospects, Prospect Delete by Batch	Select a group of prospect records for deletion.
Prospect Delete Holding	ADM_PRS_DEL_SUSP	Student Recruiting, Delete Prospects, Prospect Delete Holding	Review the prospect records that you selected for deletion and remove any that you no longer want to delete.
Prospect Delete Process	ADM_PRSP_DEL_PARMs	Student Recruiting, Delete Prospects, Prospect Delete Process	Run the Prospect Delete process.

Selecting Individual Prospect Records to Delete

Access the Delete Prospect Record page (Student Recruiting, Delete Prospects, Delete Prospect Record).

Delete Prospect Record

Choose Prospects to be Deleted Customize | Find | View All | First 1-3 of 3 Last

Prospect **Prospect Details**

	*ID	Name	*Academic Institution	*Academic Career	Delete Communications	Delete Checklists	Delete Comments		
1	AD5220	Martha Wright	PSU	Undergrad	☒	☒	☒	+...	-
2	AD5028	Alex Smith	PSU	Graduate	☒	☒	☒	+...	-
3	AD5028	Alex Smith	PSU	Undergrad	☒	☒	☒	+...	-

Delete Prospect Record page: Prospect tab

Enter a value in the ID field. If only one prospect record exists, the institution and career will appear automatically. If a prospect has multiple institution or career records, you must enter a row for each record that you want to delete.

For each prospect record, select the 3Cs, if any, that you want to delete.

Prospect Details

Select the Prospect Details tab.

Delete Prospect Record

Choose Prospects to be Deleted Customize | Find | View All | First 1-3 of 3 Last

Prospect **Prospect Details**

	Recruiting Center	Admit Term	Admit Type	Application On File	Admission Data Creation Date		
1	Undergraduate	0450	FYR	☒	03/02/2001	+...	-
2	Graduate - Central	0450	FYR	☒	03/23/2001	+...	-
3	Undergraduate	0450	FYR	☒	03/23/2001	+...	-

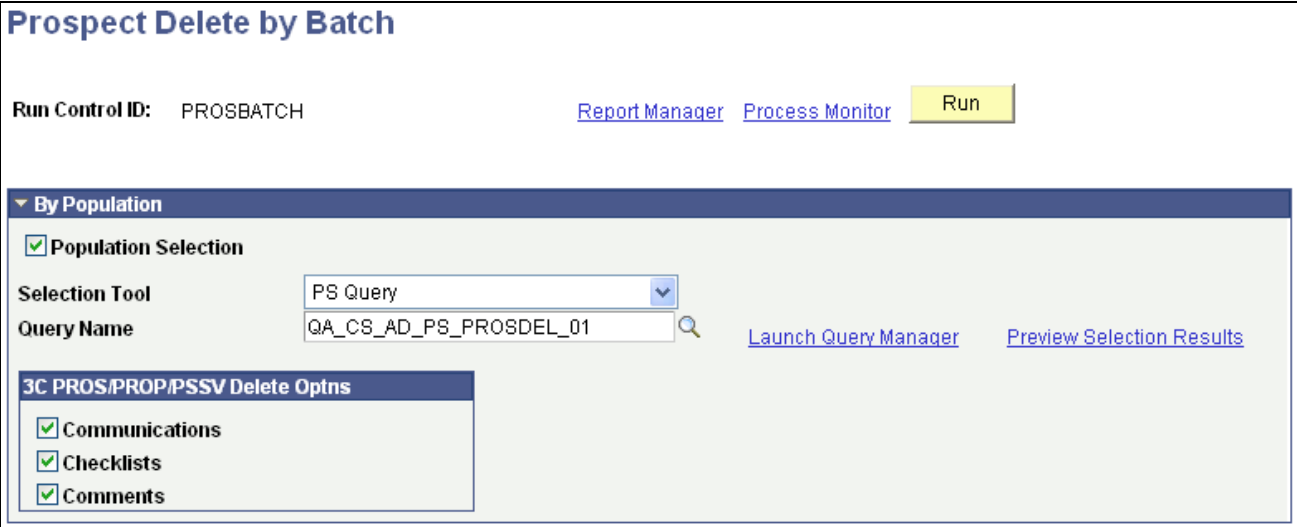
Delete Prospect Record page: Prospect Details tab

View additional information about the records that you have selected on this page.

When you save this page, the selected records are inserted into the Prospect Delete Holding table, where they are stored until you run the Prospect Delete process. If you enter an ID for a prospect for which a record already exists in the holding table, you will receive an error message and will not be able to add the prospect.

Selecting a Group of Prospect Records to Delete

Access the Prospect Delete by Batch page (Student Recruiting, Delete Prospects, Prospect Delete by Batch).



Prospect Delete by Batch

Run Control ID: PROSBATCH [Report Manager](#) [Process Monitor](#) [Run](#)

By Population

☒ Population Selection

Selection Tool: PS Query

Query Name: QA_CS_AD_PS_PROSDEL_01 [Launch Query Manager](#) [Preview Selection Results](#)

3C PROS/PROP/PSSV Delete Optns

☒ Communications

☒ Checklists

☒ Comments

Prospect Delete by Batch page

3C PROS/PROP/PSSV Delete Optns (3C PROS/PROP/PSSV delete options)

Select the 3Cs, if any, that you want to delete. Your selection will apply to all prospect records in the group. You can update the 3C information for individual records in the group by accessing the Prospect Delete Holding table after you run the process.

Running the Process

Click Run to run the Prospect Delete by Batch Application Engine (SAD_PRS_DEL) process using the PeopleSoft Process Scheduler. This process inserts all the selected records into the Prospect Delete Holding table if they do not already exist there.

Once the process runs successfully, view the message log to confirm how many records were selected (SAD_PRS_DEL_TGT) and how many records were inserted into the holding table (ADM_PRS_DELC).

Viewing the Prospect Delete Holding Table

Access the Prospect Delete Holding page (Student Recruiting, Delete Prospects, Prospect Delete Holding).

Prospect Delete Holding	
Andy Dentury	0092
Academic Institution:	PeopleSoft University Prospect Data
Academic Career:	Undergraduate
	☒ Delete Checklists
	☒ Delete Comments
	☒ Delete Communications
Remove From Holding Table	

Prospect Delete Holding page

The Prospect Delete Holding table contains all the records that you have selected for deletion, whether individually or in a group. Review these records before you run the Prospect Delete process.

You can:

- Use the check boxes to select different 3C options for a prospect.
- Click the Remove From Holding Table button to remove a record from the holding table if you no longer want to delete that record.

Click the Prospect Data link to access the Create/Update Prospects component, where you can view additional prospect information and determine whether to remove a record from the holding table.

Running the Prospect Delete Process

Access the Prospect Delete Process page (Student Recruiting, Delete Prospects, Prospect Delete Process).

Click Run to run the Prospect Delete process using the PeopleSoft Process Scheduler. This process deletes all the records in the Prospect Delete Holding table.

Technical Information

To prepare records for the optional ID Delete process, the Prospect Delete process analyzes whether data should be deleted from the STDNT_CAREER table as follows:

- The process evaluates the ADM_APPL_DATA table for each prospect, searching for an application record in the academic career corresponding to the prospect record.
 - If the process finds an application, then it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as an applicant, with the academic institution.

The prospect does not qualify for ID Delete.

- If the process does not find an application, then it evaluates the ACAD_PROG table.

- The process evaluates the ACAD_PROG table for each prospect, searching for a student record in the academic career and academic program corresponding to the prospect record.
- If the process finds a student record, it does not delete the row containing the prospect's identification number from the STDNT_CAREER table because the prospect has another relationship, as a student, with the academic institution.

The prospect does not qualify for ID delete.

- If the process does not find a student record, it deletes the row containing the prospect's EMPLID and ACAD_CAREER from the STDNT_CAREER table.

The prospect meets both conditions and *might* qualify for ID deletion.

Deleting Applications

This section lists prerequisites and discusses how to:

- Select individual applications to delete.
- Select a group of applications to delete.
- View the Application Delete Holding (ADM_APP_DEL_SUSP) table.
- Run the Application Delete SQR (ADAPPDEL) process.

Prerequisites

Before you can delete an application:

1. Select Records and Enrollment, Career and Program Information, Student Program/Plan.
2. On the Student Program page, make sure that the applicant is not an active student in the academic career corresponding to the application.

If the applicant has matriculated, delete the student records for the academic career and academic program corresponding to the application. Scroll to find and delete *only* the rows that correspond to the same academic career and academic program as the current application.

If the applicant matriculated in multiple academic programs in the same academic career and one of them is valid, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID deletion because the applicant still has a relationship, as a student, in another academic program within the institution.

3. Select Student Admissions, Application Maintenance, Maintain Applications, Application Program Data.
4. On the Application Program Data page, determine whether the applicant has another application in the same academic career corresponding to this application but in a different academic program.

If the applicant has another application in the academic career, you can still run the Application Delete process. However, the applicant does not qualify for subsequent ID deletion because the applicant still has a relationship, as an applicant, in another academic program within the institution.

Note. If a prospect record exists for the applicant, the applicant does not qualify for subsequent ID deletion because the applicant has a relationship, as a prospect, with the institution.

Pages Used to Delete Applications

Page Name	Definition Name	Navigation	Usage
Delete an Application	SAD_APP_DELETE	Student Admissions, Application Delete, Delete an Application	Select individual applications for deletion.
Application Delete by Batch	SAD_APP_DEL_BATCH	Student Admissions, Application Delete, Application Delete by Batch	Select a group of applications for deletion.
Application Delete Holding	ADM_APP_DEL_SUSP	Student Admissions, Application Delete, Application Delete Holding	Review the application records that you selected for deletion and remove any that you no longer want to delete.
Application Delete Process	ADM_APPL_DEL_PARMS	Student Admissions, Application Delete, Application Delete Process	Run the Application Delete process.

Selecting Individual Applications to Delete

Access the Delete an Application page (Student Admissions, Application Delete, Delete an Application).

Delete an Application

Choose Applications to be Deleted | Application Details | | First 1 of 1 Last

Application Number	ID	Name	Delete Communications	Delete Checklists	Delete Comments		
1 00024171	SEV0605	Mildred Pierce	☒	☒	☒		

Delete an Application page: Application tab

You can search by ID to find the application number of the record that you want to delete.

For each application, select the 3Cs, if any, that you want to delete.

Application Details

Select the Application Details tab.

Delete an Application

Choose Applications to be Deleted
[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

[Application](#) | **Application Details** |

	Academic Career	Academic Institution	Application Center	Admit Type	Created On		
1	Undergraduate	PeopleSoft University	Undergraduate	First-Year	06/21/2005		

Delete an Application page: Application Details tab

View further information about the records that you have selected.

When you save the page, the selected records are inserted into the Application Delete Holding table, where they are stored until you run the Application Delete process. If you enter an ID for an application for which a record already exists in the holding table, you will receive an error message and you will not be able to add the application.

Selecting a Group of Applications to Delete

Access the Application Delete by Batch page (Student Admissions, Application Delete, Application Delete by Batch).

Application Delete by Batch

Run Control ID: APPBATCH
 [Report Manager](#)
[Process Monitor](#)
Run

By Population

☒ **Population Selection**

Selection Tool PS Query

Query Name QA_CS_AD_PS_APPDEL_01
 [Launch Query Manager](#)
[Preview Selection Results](#)

3C ADMA/ADMP Delete Options

- ☒ Communications
- ☒ Checklists
- ☒ Comments

Application Delete by Batch page

3C ADMA/ADMP Delete Options

Select the 3Cs, if any, that you want to delete. Your selection will apply to all application records in the group. You can update 3C information for individual records in the group by accessing the Application Delete Holding table after you run the process.

Running the Process

Click Run to run the Application Delete by Batch Application Engine (SAD_APP_DEL) process using the PeopleSoft Process Scheduler. This process inserts all the selected records into the Application Delete Holding table if they do not already exist there.

Once the process runs successfully, view the message log to confirm how many records were selected (SAD_APP_DEL_TGT) and how many records were inserted into the holding table (ADM_APP_DELC).

Viewing the Application Delete Holding Table

Access the Application Delete Holding page (Student Admissions, Application Delete, Application Delete Holding).

Application Delete Holding

Application Number:	00024171	Application Data
EmplID:	SEV0605	
Name:	Mildred Pierce	
Academic Institution:	PeopleSoft University	
Academic Career:	Undergraduate	
Application Center:	Undergraduate	
Admit Type:	First-Year	
	☒ Delete Communications	
	☒ Delete Checklists	
	☒ Delete Comments	
Remove From Holding Table		

Application Delete Holding page

The Application Delete Holding table contains all the records that you have selected for deletion, whether individually or in a group. Review these records before you run the Application Delete process.

You can:

- Use the check boxes to select different 3C options for an application.
- Click the Remove From Holding Table button to remove a record from the holding table if you no longer want to delete that record.

Click the Application Data link to access the Maintain Applications component, where you can view additional applicant information and determine whether to remove a record from the holding table.

Running the Application Delete Process

Access the Application Delete Process page (Student Admissions, Application Delete, Application Delete Process).

Click Run to run the Application Delete process using the PeopleSoft Process Scheduler. All application records will be deleted from the holding table.

Technical Information

To prepare records for the optional ID Delete process, the Application Delete process analyzes whether data should be deleted from the ID Delete control tables:

- The process evaluates the ACAD_PROG table for each applicant, searching for a student record in the academic career corresponding to the application.
 - If the process finds a student record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a student, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find a student record, then it evaluates the ADM_APPL_PROG table.
- The process evaluates the ADM_APPL_PROG table for each applicant, searching for another application in the academic career corresponding to the application record.
 - If the process finds another application, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant still has a relationship, as an applicant, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find an application, then it evaluates the ADM_PRSPCT_CAR table.
- The process evaluates the ADM_PRSPCT_CAR table for each applicant, searching for a prospect record in the academic career corresponding to the application record.
 - If the process finds a prospect record, it does not delete the row containing the applicant's identification number from the STDNT_CAREER table because the applicant has another relationship, as a prospect, with the academic institution. Therefore, the applicant does not qualify for ID deletion.
 - If the process does not find a prospect record, it deletes the row containing the applicant's EMPLID, ACAD_CAREER, and CAR_REQ_TERM from the STDNT_CAREER table.
- The process updates the Application Number Deleted field in the ITEM_SF table from N, the default, to Y.
- Data in the ITEM_SF table flows up to the ACCOUNT_SF table.

Chapter 41

Producing a Year to Year Comparison Report

This chapter discusses how to run the Admissions Funnel Report process.

Running the Admissions Funnel Report Process

PeopleSoft delivers an Admissions Funnel report that you can use to report on your prospect and applicant numbers across one or multiple terms. Using this process, you can produce a year-to-year demographic comparison report. You can run the Admissions Funnel report in multiple formats showing varied data, depending on your criteria. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, and academic program. You can also include a comparison of terms on this report. The report calculates numeric and percentile representations of these comparisons.

This section discusses how to run Admissions Funnel reports.

Page Used to Run the Admissions Funnel Report Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Admissions Funnel Report - Parameters	RUNCTL_ADFUNNEL	Student Admissions, Reports, Admissions Funnel Report, Parameters	Run a demographic funnel report.

See Also

[Appendix B, "Recruiting and Admissions Reports," Recruiting and Admissions Reports: A-Z, page 1163](#)

Running Admissions Funnel Reports

Access the Admissions Funnel Report - Parameters page (Student Admissions, Reports, Admissions Funnel Report, Parameters).

Parameters

Run Control ID: ML

[Report Manager](#)
[Process Monitor](#)

Report Request Parameters

*Institution: PeopleSoft University
 ☐ Create Compare Report

*Report Grouping:
☐ Show Term Detail

Address Type for Country/State: Home

All Terms for Academic Year:

Admit Term

Find | View All First 1-2 of 11 Last

0470	2002 FICI	+ -
0475	2002 Fall	+ -

Admissions Funnel Report - Parameters page

Define the data that you want to appear in your report in the Report Request Parameters section.

Report Grouping

Group the data on your report. The default is to group the report by at least the application type and status (*Only by Application Type, Status*). However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select *Also by Application Method*, then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. Values are *Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region, and Also by State*.

Create Compare Report

Select if you want to compare terms on this report. When this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.

Regulatory Region

Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of *Also by Ethnicity* is selected.

Show Term Detail

Select if you want to view the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you want to view your data in one group.

Address Type for Country/State	This field appears when you select <i>Also By Country/State</i> in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.
All Terms for Academic Year	Select the year for which you want to run the report. When you select an academic year, the admit terms defined for that year automatically appear. You can remove any of these terms. You must select a year for the Admissions Funnel Report process to run successfully.
All Terms in Comparison Year	If you are running a comparison report, select the year to which you are comparing.
Admit Term	The system populates the admit terms based on the year you selected in the All Terms for Academic Year. You can add and delete the admit terms. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.
Comparison Admit Term	After you select a comparison year, the admit terms defined for that year automatically appear. You can remove any of these terms.

Appendix A

(GBR) PBI Field Derivation

This chapter describes how the system derives the field values for the Upload, Update, and Report extracts.

See Also

[Chapter 25, "\(GBR\) Managing PBI Data Exchange," page 685](#)

Understanding PBI Field Derivation

We recommend that you review the field specification, sample XML files, schemas and validation documents available on UKBA web site. The field specification provides information, such as, each field's format, description, whether a field value is required for SMS to issue the CAS number, whether the academic institution must validate a field value using the schema, and whether SMS performs additional validation on the field value when you upload the file.

You can capture the field values at three levels in Campus Solutions:

1. Configuration level.
2. Academic program or plan level.
3. CAS Details level.

See the *Preparing for PBI Data Exchange* section in the "(GBR) Managing PBI Data Exchange" chapter, for more information about the data capture levels.

The following table lists the navigation paths for the pages mentioned throughout this chapter:

Page	Navigation
PBI Configuration	Student Admissions, PBI Processing, PBI Configuration
Academic Plan PBI Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, PBI Data
Academic Program PBI Data	Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, PBI Data
CAS Details	Student Admissions, PBI Processing, CAS Maintenance, CAS Details

Upload Extract Fields

This section discusses how the Create Extract process derives the field values for the Upload extract. To derive specific fields the following values are determined for each CAS Details record:

- Campus and Academic Program
 - Selected from the current Application Program Data record for applicants.
 - Selected from the current Student Program record for students.
- Academic Plan
 - Selected from the Reported Plan value from the CAS Details page.
 - If no Reported Plan is defined:
 - Selected from the current Application Plan Data record for applicants. If more than one record exists the first plan code alphabetically is selected.
 - Selected from the Student Plan record for students. If more than one record exists the plan with the lowest sequence number is selected.-
- Academic Subplan
 - Selected if Enable Sub-Plan Reporting is checked on the PBI Configuration page.
 - Selected from the current Application Sub-Plan Data record for applicants.
 - Selected from the current Student Sub-Plan record for students.
 - If more than one record exists the first subplan code alphabetically is selected.

Upload File ID

Upload Extract Data page: Header

XML Tag: <BulkUploadFileId>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Upload File ID Override

Derivation Steps:

1. Derive from the Upload File ID Override parameter of the Create Extract process.

- Derive in the format *INST_UPLOAD_YYYY_MM_DD_nn* (for example, *PSUNV_UPLOAD_2009_09_27_01*), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

Schema ID

Upload Extract Data page: File Details

XML Tag: <SchemaID>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
PBI Configuration	Schema ID

Derivation Steps:

- Derive the long description value of the translate value defined on the PBI Configuration page.

Tier ID

Upload Extract Data page: File Details

XML Tag: <TierID>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
PBI Configuration	Tier ID

Derivation Steps:

- Derive the long description value of the translate value defined on the PBI Configuration page.

Category

Upload Extract Data page: File Details

XML Tag: <Category>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Category

Derivation Steps:

1. Derive the long description value of the translate value defined on the PBI Configuration page.

Sponsor Licence Number

Upload Extract Data page: File Details

XML Tag: <SponsorLicenceNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Sponsor Licence Number Campus Sponsor Licence Number

Derivation Steps:

1. Derive the value defined for the Campus of the applicant or student defined on the PBI Configuration page.
2. Derive the value defined for the institution on the PBI Configuration page.

Applicant ID

Upload Extract Data page: Header

XML Tag: <ApplicantID>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ID

Derivation Steps:

1. Derive from the CAS Details record.

UCAS Personal ID

Upload Extract Data page: Applicant Details

XML Tag: <UCAS_UKPASS_Id>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	UCAS Personal ID
External System ID (Campus Community, Personal Information, Identification, External System ID)	External System ID

Derivation Steps:

1. Derive from External System ID records with type UC or UP.
2. Derive as null.

Application ID

Upload Extract Data page: Applicant Details

XML Tag: <ApplicationID>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Application Number Program Number

Derivation Steps:

1. Derive as a concatenation of Application Number and Program Number from the CAS Details page.
2. Derive as null for Student record type.

Family Name

Upload Extract Data page: Applicant Details

XML Tag: <FamilyName>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Last Name

Derivation Steps:

1. Derive from the current primary name record.

Given Name

Upload Extract Data page: Applicant Details

XML Tag: <GivenName>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	First Name

Derivation Steps:

1. Derive from the current primary name record.

Note. UKBA have indicated that this field can be blank where the applicant or student only has one name although a first name value is required in Campus Solutions. If required the Reported Value for Given Name can be set to blank on the Upload Extract Data page prior to creating the XML.

Other Names

Upload Extract Data page: Applicant Details

XML Tag: <GivenName>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Biographical , Names)	Middle Name

Derivation Steps:

1. Derive from the current primary name record.
2. Derive as null.

Nationality

Upload Extract Data page: Applicant Details

XML Tag: <Nationality>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Nationality

Derivation Steps:

1. Derive from the CAS Details record.

Note. If required the Reported Value can be set to *STATELESS* on the Upload Extract Data page prior to creating the XML. The text must be contained within to pass schema validation.

Gender

Upload Extract Data page: Applicant Details

XML Tag: <Gender>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Gender

Derivation Steps:

1. Derive from the current Biographical History record where Male is derived as 1 and Female is derived as 2.
2. Derive as *NULL ERROR*.

Country of Birth

Upload Extract Data page: Applicant Details

XML Tag: <CountryOfBirth>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Country

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR*.

Place of Birth

Upload Extract Data page: Applicant Details

XML Tag: <PlaceOfBirth>

Mandatory: No

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Birth Location

Derivation Steps:

1. Derive from the Birth Information record.
2. Derive as *NULL ERROR*.

Date of Birth

Upload Extract Data page: Applicant Details

XML Tag: <DateOfBirth>

Mandatory: Yes

Pages Used:

Page	Page Element
Names (Campus Community, Personal Information, Add/Update a Person, Biographical History)	Date of Birth
CAS Details	Report Month/Year Only Report Year Only

Derivation Steps:

1. Derive from the person record. If Report Year Only check box is selected, derived as YYYY. If the Report Month/Year Only check box is selected, derived as YYYY-MM. If neither check box is selected derived as YYYY-MM-DD.
2. Derive as *NULL ERROR*.

Passport Number

Upload Extract Data page: Applicant Details

XML Tag: <ApplicantPassportOrTravelDocumentNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Passport Number

Derivation Steps:

1. Derive from the CAS Details record.

Partner Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution

Page	Page Element
Academic Program PBI Data	Partner Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Sponsor Licence Number

Upload Extract Data page: Other Institution Details

XML Tag: <SponsorLicenceNumber>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Regional (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Regional)	Sponsor Licence Number

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Partner Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Partner Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution

Page	Page Element
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Partner Institution Address 1.

Partner Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Partner Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Partner Institution

Page	Page Element
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Country

Upload Extract Data page: Other Institution Details

XML Tag: <Country>

Mandatory: If any partner institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Partner Institution Postcode

Upload Extract Data page: Other Institution Details

XML Tag: <PostCode>

Mandatory: If any partner institution details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Partner Institution
Academic Plan PBI Data	Partner Institution
Academic Program PBI Data	Partner Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Partner Institution has a value and Partner Institution Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution

Upload Extract Data page: Other Institution Details

XML Tag: <Name>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution

Page	Page Element
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Organization Table (Campus Community, Organization, Create/Maintain Organizations, Organization Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Overseas Institution Address 1

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value, if the country is either Belgium or the Netherlands, the value is derived as a combination of Street (Address Line 3) and Number.

Overseas Institution Address 2

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Address 3

Upload Extract Data page: Other Institution Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution

Page	Page Element
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Overseas Institution Address 1.

Overseas Institution City

Upload Extract Data page: Other Institution Details

XML Tag: <City>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Overseas Institution County/Area/District

Upload Extract Data page: Other Institution Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Country

Upload Extract Data page: Other Institution Details

XML Tag: <Country>

Mandatory: If any overseas institution details are supplied

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Overseas Institution has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Overseas Institution Postcode

Upload Extract Data page: Other Institution Details

XML Tag: <PostCode>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Overseas Institution
Academic Plan PBI Data	Overseas Institution
Academic Program PBI Data	Overseas Institution
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.

4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Course Title

Upload Extract Data page: Course Details

XML Tag: <CourseCurriculumTitle>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Title Override
PBI Configuration	Enable Sub-Plan Reporting
Sub-Plan HESA (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan HESA)	Course Title
Academic Sub-Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Description
Plan HESA Data (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data)	Course Title
Academic Plan Table (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table)	Description

Derivation Steps:

1. Derive from the CAS Details record.
2. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the Course Title from the Sub-Plan HESA record.
3. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive a concatenation of plan description + space + sub-plan description.
4. Derive the Course Title from the Plan HESA Data record.
5. Derive the plan description.

Course ID

Upload Extract Data page: Course Details

XML Tag: <CourseID>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Enable Sub-Plan Reporting

Derivation Steps:

1. If Enable Sub-Plan Reporting is checked and a sub-plan record is found for the applicant or student, derive the sub-plan code.
2. Derive the plan code.

Academic Level

Upload Extract Data page: Course Details

XML Tag: <AcademicLevel>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Academic Level

Derivation Steps:

1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.

There are page elements that have translate values. For example, translate values *Presessional B1* and *Presessional B2* for the Academic Level page element on the CAS Details page. The Create Extract process derives the field value as short name (XLATSHORTNAME) from these page elements. For example, suppose you have defined an academic level translate value on the CAS Details page as *Presessional B1* which has a short name of *B1*. In such a case, the Create Extract Data process derives the Academic Level field value as *B1*.

Note. The system sets the default Academic Level value on the CAS Details page based on the COURSEAIM defined on the Plan HESA Data, Program HESA Data, or Sub-Plan HESA page. The order in which COURSEAIM is checked: Plan HESA Data page first, then Program HESA Data page and finally Sub-Plan HESA page. The system defaults the NQF level using the first letter of the COURSEAIM value as follows:

D — Doctoral — NQF Level 8

M — Masters — NQF Level 7

H — Honours — NQF Level 6

I — Intermediate — NQF Level 5

C — Certificate — NQF Level 4

You can change this default value on the CAS Details page.

Secondary Academic Level

Upload Extract Data page: Course Details

XML Tag: <SecondaryAcademicLevel>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Secondary Academic Level

Derivation Steps:

1. Derive from the CAS Details record. Derive as the short name (XLATSHORTNAME) from the Translate Values table (PSXLATITEM), for SAD_PB_ACAD_LEVEL.
2. Derive as null.

See Also

Academic Level

Course Start Date

Upload Extract Data page: Course Details

XML Tag: <CourseStartDate>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	CourseStartDate

Derivation Steps:

1. Derive from the CAS Details record.

Note. If the derived date is not in the future an error message is logged.

Latest Acceptance Date

Upload Extract Data page: Course Details

XML Tag: <LatestDateForAcceptanceOnCourse>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Latest Acceptance Date

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Note. If the derived date is not in the future, or is before the derived Course Start Date, or is after the derived Expected Course End Date, an error message is logged.

Expected End Date

Upload Extract Data page: Course Details

XML Tag: <ExpectedCourseEndDate>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Expected End Date

Derivation Steps:

1. Derive from the CAS Details record.

Note. If the derived date is not in the future, or is before the derived Course Start Date, an error message is logged.

Full-Time Course

Upload Extract Data page: Course Details

XML Tag: <CourseIsFullTime>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Full-Time Course

Derivation Steps:

1. If the value in the CAS Details record is Yes, derive as *true*
2. Derive as *false*.

Course Hours

Upload Extract Data page: Course Details

XML Tag: <CourseHoursPerWeek>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Course Hours
Academic Plan PBI Data	Course Hours
Academic Program PBI Data	Course Hours

Note. The Course Hours field is mandatory on the CAS Details page if Full-Time Course is No. The system performs steps 2, 3, or 4 only if Full-Time Course is Yes on the CAS Details page.

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.

3. Derive from the Academic Program record.
4. If Full-Time Course is derived as true, derive as *0.0*

Main Site Address 1

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR*.

Main Site Address 2

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site

Page	Page Element
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 1

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Address 3

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Address Line 3

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site City

Upload Extract Data page: Course Details

XML Tag: <City>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	City

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR*.

Main Site County/Area/District

Upload Extract Data page: Course Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code

Page	Page Element
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	County (UK addresses) State

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as null.

Main Site Postcode

Upload Extract Data page: Course Details

XML Tag: <PostCode>

Mandatory: Yes

Pages Used:

Page	Page Element
PBI Configuration	Main Site
CAS Details	Reported Site
Campus Table (Set Up SACR, Foundation Tables, Academic Structure, Campus Table)	Location Code
Location Address (Set Up HRMS, Foundation Tables, Organization, Location)	Post Code

Derivation Steps:

1. Derive from location defined as Reported Site in the CAS Details record.
2. Derive from the location defined as the Main Site in the PBI Configuration record.
3. Derive from the primary location for the Campus of the applicant or student.
4. Derive as *NULL ERROR*.

Work Placement

Upload Extract Data page: Course Details

XML Tag: <ApplicantHasWorkPlacement>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Work Placement

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Work Placement Address 1

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 1

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address formats for Belgium and the Netherlands do not include use of the Address 1 field. As this is a mandatory value if the country is either Belgium or the Netherlands the value is derived as a combination of Street (Address Line 3) and Number.

Work Placement Address 2

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 2

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Address 3

Upload Extract Data page: Course Details

XML Tag: <AddressLine>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation

Page	Page Element
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Address Line 3

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. If the country is either Belgium or the Netherlands the field is derived as null as the Street (Address Line 3) value is used to derive Work Placement Address 1.

Work Placement City

Upload Extract Data page: Course Details

XML Tag: <City>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	City

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Note. The delivered address format for Singapore does not include use of the City field. If the country value is Singapore the City value will also be derived as Singapore.

Work Placement County/Area/District

Upload Extract Data page: Course Details

XML Tag: <CountyAreaDistrict>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	County (UK addresses) State

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Country

Upload Extract Data page: Course Details

XML Tag: <Country>

Mandatory: If any work placement details are supplied

Pages Used:

Page	Page Element
CAS Details	Placement Organisation

Page	Page Element
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Country

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. Derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Work Placement Postcode

Upload Extract Data page: Course Details

XML Tag: <PostCode>

Mandatory: If any work placement details are supplied and country is GBR

Pages Used:

Page	Page Element
CAS Details	Placement Organisation
Academic Plan PBI Data	Placement Organisation
Academic Program PBI Data	Placement Organisation
Location Details (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details)	Post Code

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive from the Academic Plan record.
3. Derive from the Academic Program record.
4. If Work Placement Address 1 has a value and Work Placement Country is GBR, derive as NULL ERROR, otherwise derive as null.

Note. The address fields are derived from the current active primary location for the selected organization.

Accommodation Provided

Upload Extract Data page: Financial Details

XML Tag: <AccommodationProvided>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Provided

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Accommodation Fees Included

Upload Extract Data page: Financial Details

XML Tag: <CourseFeeIncludesAccommodationCosts>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Accommodation Fee Included

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

First Year Course Fees

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as 0, if the First Year Course Fees is 0 on the CAS Details page.

Course Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

Accommodation Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: No

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

First Year Boarding Fees

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	First Year Boarding Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as 0, if the First Year Boarding Fees is 0 on the CAS Details page.

Boarding Fees Paid

Upload Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as null.

ATAS Certificate Required

Upload Extract Data page: Certification

XML Tag: <CourseRequiresATAS>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	ATAS Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Dean's Certificate Required

Upload Extract Data page: Certification

XML Tag: <PostgraduateDeanCertificateRequired>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Dean's Certificate Required

Derivation Steps:

1. Derive from the CAS Details record.

Note. Yes is derived as *true*, No is derived as *false*.

Offer Documents

Upload Extract Data page: Documentation

XML Tag: <DocumentsUsedToObtainOffer>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	Offer Documents

Derivation Steps:

1. Derive from the CAS Details record.

Update Extract Fields

This section discusses how the Create Extract process derives the field values for the Update extract.

Update File ID

Update Extract Data page: Header

XML Tag: <BulkUpdateFileId>

Mandatory: Yes

Pages Used:

Page	Page Element
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Update File ID Override

Derivation Steps:

1. Derive from the Update File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_UPDATE_YYYY_MM_DD_nn* (for example, PSUNV_UPDATE_2009_09_27_01), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

CAS Number

Update Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details page.

First Year Course Fees

Update Extract Data page: Financial Details

XML Tag: <CourseFeesForFirstYearOnly>

Mandatory: Yes

Pages Used:

Page	Page Element
CAS Details	First Year Course Fees

Derivation Steps:

1. Derive from the CAS Details record. Derive as 0, if the First Year Course Fees is 0 on the CAS Details page.

Course Fees Paid

Update Extract Data page: Financial Details

XML Tag: <CourseFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Course Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Accommodation Fees Paid

Update Extract Data page: Financial Details

XML Tag: <AccommodationFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

Page	Page Element
CAS Details	Accommodation Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Boarding Fees Paid

Update Extract Data page: Financial Details

XML Tag: <BoardingFeesPaidToDate>

Mandatory: One of the Fees Paid fields must be present.

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	Boarding Fees Paid

Derivation Steps:

1. Derive from the CAS Details record.
2. Derive as zero.

Note. An error message is logged if none of the Fees Paid fields contains a value greater than zero.

Report File Fields

This section discusses how the Create Extract process derives the field values for the Report extract.

Report File ID

Report Extract Data page: Header

XML Tag: <BulkReportingID>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
Create Extract Data (Student Admissions, PBI Processing , Create Extract Data)	Report File ID Override

Derivation Steps:

1. Derive from the Report File ID Override parameter of the Create Extract process.
2. Derive in the format *INST_REPORT_YYYY_MM_DD_nn* (for example, *PSUNV_REPORT_2009_09_27_01*), where *INST* is the institution code and *nn* is an automatically generated sequence number for the day.

CAS Number

Report Extract Data page: Header

XML Tag: <CASNumber>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
CAS Details	CAS Number

Derivation Steps:

1. Derive from the CAS Details record.

Expected Enrollment Date

Report Extract Data page: Report Details

XML Tag: <ExpectedEnrollmentDate>

Mandatory: Yes

Pages Used:

<i>Page</i>	<i>Page Element</i>
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Expected Enrollment

Derivation Steps:

1. Derive from the CAS Details record

Notes

Report Extract Data page: Report Details

XML Tag: <Notes>

Mandatory: No

Pages Used:

<i>Page</i>	<i>Page Element</i>
Report Details (Student Admissions, PBI Processing, CAS Maintenance, Report Details)	Notes

Derivation Steps:

1. Derive from the CAS Details record
2. Derive as *NULL ERROR*.

Appendix B

Recruiting and Admissions Reports

This appendix provides an overview of Recruiting and Admissions reports and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

Recruiting and Admissions Reports: A-Z

This table lists the Recruiting and Admissions reports, sorted alphanumerically by report ID. The reports listed are Crystal and SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Note. On June 1, 2011, Oracle discontinued distribution of SAP's Business Objects Enterprise and Crystal Reports with PeopleTools.

Existing customers may use Business Objects Enterprise and Crystal Reports licenses previously received from Oracle.

Customers who wish to use future versions of Business Objects and Crystal Reports products with PeopleSoft will need to obtain appropriate license and support directly from SAP/Business Objects.

Report ID and Report Name	Description	Navigation	Run Control Page
ADAVGCUT Average Cutoff Report	Enables you to assess an evaluated applicant pool to determine the admissions averages that drive certain program actions. (SQR)	Student Admissions, Reports, Average Cutoff Report	RUNCTL_ADAVGCUT

Report ID and Report Name	Description	Navigation	Run Control Page
ADFUNNEL Admissions Funnel	Lists prospect and applicant numbers across one or multiple terms. The report lists the numbers of individuals by applicant type and status as well as other various conditions that you choose, such as ethnicity, gender, region, and academic program (SQR).	Student Admissions, Reports, Admissions Funnel Report	RUNCTL_ADFUNNEL
AD701 Admissions Action Table	Lists all program actions defined on the Program Action Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Admissions Action Table	PRCSRUNCNTL_AD_RC
AD702 Test Table	Lists all of the tests defined on the Test Tables page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Test Scores, Test Tables	PRCSRUNCNTL_AD_RC
AD703 Recruiting Category Table	Lists all recruiting categories defined on the Recruiting Category Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Recruiting, Recruiting Category Table	PRCSRUNCNTL_AD_RC
AD704 Referral Source Table	Lists all referral sources defined on the Referral Sources Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Prospects, Referral Source Table	PRCSRUNCNTL_AD_RC
AD705 Region Table	Lists all regions defined on the Region Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Recruiting, Region Table	PRCSRUNCNTL_AD_RC
AD710 Summary Type Table	Lists all summary types defined on the External Summary Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, External Summary Type Tbl	PRCSRUNCNTL_AD_RC
AD711 Admit Type Table	Lists all admit types defined on the Admit Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Admit Type Table	PRCSRUNCNTL_AD_RC

Report ID and Report Name	Description	Navigation	Run Control Page
AD712 Application Center Table	Lists all application centers defined on the Application Center Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Application Center Table	PRCSRUNCNTL_AD_RC
AD713 Admission Evaluation Table	Lists all evaluation codes defined on the Evaluation Codes Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Table	PRCSRUNCNTL_AD_RC
AD714 Evaluation Committee Table	Lists all evaluation committees defined on the Evaluation Committee Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Committee Table	PRCSRUNCNTL_AD_RC
AD715 Evaluation Status Table	Lists all evaluation statuses defined on the Evaluation Status Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Evaluation Status Table	PRCSRUNCNTL_AD_RC
AD716 GPA Type Table	Lists all GPA types defined on the GPA Type Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, GPA Type Table	PRCSRUNCNTL_AD_RC
AD717 GPA Rules Tables	Lists all GPA conversion rules defined on the GPA Rules Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, GPA Rules Table	PRCSRUNCNTL_AD_RC
AD718 Material Group Table	Lists all material groups defined on the Material Group Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Material Group Table	PRCSRUNCNTL_AD_RC
AD719 Rating Scheme Table	Lists all rating schemes defined on the Rating Scheme Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Rating Scheme Table	PRCSRUNCNTL_AD_RC

Report ID and Report Name	Description	Navigation	Run Control Page
AD721 Recruiting Center Table	Lists all recruiting centers defined on the Recruiting Center Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Prospects, Recruiting Center Table	PRCSRUNCNTL_AD_RC
AD724 Rating Scheme Component Table	Lists all rating components defined on the Rating Comp Def Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Rating Component Table	PRCSRUNCNTL_AD_RC
AD726 Program Action Reason Table	Lists all program action reasons defined on the Program Action Reasons Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Applicants, Program Action Reason Table	PRCSRUNCNTL_AD_RC
AD727 Material Type Table	Lists all material types and their variable data. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Application Evaluation, Material Type Table	PRCSRUNCNTL_AD_RC
AD728 School Type Table	Lists all school types defined on the School Types Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Education, School Type Table	PRCSRUNCNTL_AD_RC
AD729 Test Component Table	Lists all of the test components defined on the Test Components Table page. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, External Test Scores, Test Component Table	PRCSRUNCNTL_AD_RC
AD730 Target Cohort Table	Lists all enrollment management target cohort levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Cohort	PRCSRUNCNTL_AD_RC
AD731 Target Division Table	Lists all enrollment management target division levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Division	PRCSRUNCNTL_AD_RC

Report ID and Report Name	Description	Navigation	Run Control Page
AD732 Target Population Table	Lists all enrollment management target population levels that your institution has defined. (Crystal)	Set Up SACR, Product Related, Recruiting and Admissions, Reports, Enrollment Target, Enrollment Target Population	PRCSRUNCNTL_AD_RC

Recruiting and Admissions Reports: Selected Reports

This section provides detailed information about individual reports including important fields and tables accessed. The reports are listed alphanumerically by report ID.

ADAVGCUT

Institution	Enter the institution name.
Academic Program	Enter the academic program for which you want to generate an average cutoff report.
Admit Term	Enter the admit term for which you want to generate an average cutoff report.

Running the process creates a file called adavgcut.lis. Use this file to view the output.

Note. If you enter an academic program and admit term combination that is not set up in the Average Cutoff Table page, you receive a blank report.

ADFUNNEL

Define the data that you want to appear in your report in the Report Request Parameters section.

Report Grouping	Group the data on your report. The default is to have the report grouped by at least the application type and status (<i>Only by Application Type, Status</i>). However, you can select a different option to group the report by other criteria in addition to application type and status. For example, if you select <i>Also by Application Method</i> , then the report will be grouped by application type, status, and application method. Values for this field are delivered with your system as translate values. You can modify these translate values but you may also need to modify the report according to the translate values added. The delivered values are <i>Only by Application Type, Status, Also by Application Method, Also by Ethnicity, Also by Event Type, Also by Gender, Also by Program, Also by Region, and Also by Country/State</i> .

Create Compare Report	Select if you want to compare terms on this report. After this check box is selected, additional fields appear on the screen enabling you to select additional terms. If you want to report on only one term, clear this check box.
Regulatory Region	Select the Regulatory Region to determine which Ethnic Groups to display in the report. The field will display when the Report Grouping of 'Also by Ethnicity' is selected.
Show Term Detail	Select if you want to see the set of terms and details regarding those terms. You can view details of up to five terms. If you have selected more than five terms and you select this check box, you will receive an error message. Clear this check box if you prefer to see your data in one group.
Address Type for Country/State	This field appears when you select <i>Also By Country/State</i> in the Report Grouping field. Select the address type that you want the system to use when grouping the report data.
All Terms for Academic Year	Select the year for which you want to run the report. After you select an academic year, the admit terms defined for that year automatically appear. You can remove any of the terms that you do not want to see. You must select a year for the Admissions Funnel Report process to run successfully.
All Terms in Comparison Year	If you are running a comparison report, select the year to which you are comparing.
Admit Term	The system populates the admit terms based on the year you selected in the All Terms for Academic Year. You can add and delete the admit terms if you want. However, you must select at least one admit term for the Admissions Funnel Report process to run successfully.
Comparison Admit Term	After you select a comparison year, the admit terms defined for that year automatically populate these fields. You can remove any of the terms you do not want to see.

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