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Understanding the PeopleSoft Online Help and PeopleBooks

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PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle’s PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Note: Only the most current release of hosted documentation is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization’s custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See PeopleTools Installation for your database platform, “Installing PeopleSoft Online Help.” If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.
Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<table>
<thead>
<tr>
<th>Typographical Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key+Key</td>
<td>Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.</td>
</tr>
<tr>
<td>. . . (ellipses)</td>
<td>Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.</td>
</tr>
<tr>
<td>{ } (curly braces)</td>
<td>Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (</td>
</tr>
<tr>
<td>[ ] (square brackets)</td>
<td>Indicate optional items in PeopleCode syntax.</td>
</tr>
<tr>
<td>Typographical Convention</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>&amp; (ampersand)</td>
<td>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.</td>
</tr>
<tr>
<td>⇒</td>
<td>This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.</td>
</tr>
</tbody>
</table>

**ISO Country and Currency Codes**

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

**Region and Industry Identifiers**

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

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

**Region Identifiers**

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America
Industry Identifiers
Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

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

Access to Oracle Support
Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility
For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help
Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What’s new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft CS Related Links

My Oracle Support

Contact Us
Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.
Follow Us

Get the latest PeopleSoft updates on Facebook.

Follow PeopleSoft on Twitter@PeopleSoft_Info.
Chapter 1

Getting Started with PeopleSoft Campus Self Service

Campus Self Service Overview

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

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

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

Campus Self Service Business Processes

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

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

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

• Campus Community

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

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

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

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

• Recruiting and Admissions:

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

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

• Visitors can request information from your institution and a particular academic career and program. When visitors request information over the internet, they enter information about themselves that the system converts to prospect data.

• Applicants can accept or decline admission.

• Applicants can view their application status.

• Administrators can view prospect and applicant information by category, region, and organization.

• Student Records:

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

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

• Student Center

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

• Student Planner
A self-service page that provides students with a tool to plan their courses for an individual term, multiple terms, or their entire stay at the institution.

• Enrollment Shopping Cart

A staging area where students can plan and build their schedules for an upcoming term.

• Enrollment

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

• Academic Records

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

• Degree Progress/Graduation

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

• Transfer Credit

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

• Faculty Center

On the Faculty Center self-service page, instructors can view their class and exam schedules; search for faculty and classes; browse the course catalog; and access class rosters, grade rosters, learning management system web sites, and advisee information.

• Financial Aid:

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

• Accept/Decline Awards

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

• View Financial Aid

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

• Student Financials:

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

Student Financials self-service provides students or faculty access to the following:
• **Account Inquiry**

  Students can view details about their financial account.

• **Payment Profile**

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

• **Make a Payment**

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

• **Contributor Relations:**

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

  Outreach self-service functionality provides access to the following:

  • Strategy information—to add, update, and view prospect strategies and link actions to those strategies. Then users can view strategy summaries and associated actions.

  • Action Plans and Results—to add and update actions, and report results. Users can also view action and contact report summaries and clearances.

  • To Do Lists—to create individual staff to do lists displaying information about prospects. Then users can view, sort, and update the lists.

  • Analysis—access to a wide variety of online reports.

---

**Campus Self Service Implementation**

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

Campus Self Service has no PeopleSoft Setup Manager component interfaces.

---

**Additional Information for Getting Started with Self Service**

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation: Campus Solutions Application Fundamentals documentation and Campus Community Fundamentals documentation.

See Campus Solutions Application Fundamentals.

See Campus Community Fundamentals.
For information about deferred processing, see "Additional Information for Getting Started with Campus Solutions" (PeopleSoft Campus Solutions 9.0: Application Fundamentals).
Chapter 2

Understanding PeopleSoft Campus Self Service

Understanding PeopleSoft Campus Self Service

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

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

Note: PeopleSoft Campus Self Service integrates with PeopleSoft Campus Solutions, but it is licensed separately.
Chapter 3

Setting Up Self-Service Navigation

Setting Up Self-Service Navigation

Use the Navigation Tabs Setup (SSS_NA_V_SETUP) component to define the two-level folder tabs for self-service applications.

You can change the name and order of the navigational tabs that appear in student Self Service for each of the functional areas — Campus Community, Faculty Center, Financials and Student Records.

This section discusses how to:

• Define tabs for self-service applications.
• Set up the Enrollment tab for Student Records Self Service.

Page Used to Define Tabs for Self-Service Applications

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
Defining Tabs for Self-Service Applications


Image: Navigation Tabs Setup page (1 of 2)

This example illustrates the fields and controls on the Navigation Tabs Setup page (1 of 2). You can find definitions for the fields and controls later on this page.

Navigation Tabs Setup

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Records Student Self-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main Tabs</strong></td>
<td></td>
</tr>
<tr>
<td><code>Main Tab</code></td>
<td>CLASS_SRCH</td>
</tr>
<tr>
<td><code>Display Sequence Nbr</code></td>
<td>10</td>
</tr>
<tr>
<td><strong>Main Tab Label</strong></td>
<td></td>
</tr>
<tr>
<td><code>Message Set Number</code></td>
<td>14630 Message Text</td>
</tr>
<tr>
<td><code>Message Number</code></td>
<td>49 Search</td>
</tr>
<tr>
<td>✓ Show sub-navigation</td>
<td></td>
</tr>
</tbody>
</table>
This example illustrates the fields and controls on the Navigation Tabs Setup page (2 of 2). You can find definitions for the fields and controls later on this page.

You can use the Navigation Tabs Setup page to:

- Change the name of a tab in Self Service (which also changes the Student Center links).
- Change sequence numbers and set secondary tab defaults to change the order of the tabs and the secondary tabs.
- Add additional tabs.
The Show sub-navigation check box is selected by default. You might want to clear this check box if you use only one of the subtabs or pages in a particular area.

Only users with security access to the Navigation Tabs Setup component can configure the tabs.

In Self Service, students can access only the tabs for which they have access to the relevant component. For example, if course history is a secondary tab under the Plan main tab and a student does not have access to the SSS_MY_CRSEHIST component, the student cannot see the course history tab.

Here is an example of the self-service Search for Classes page:

**Image: Example of the Search for Classes page**

This example illustrates the fields and controls on the Search for Classes page. You can find definitions for the fields and controls later on this page.

You can see how the text in the Message Text fields on the setup page correspond to the tab names in Self Service.

The Search tab has the lowest sequence number in the Main Tabs group box on the setup page and therefore appears first in Self Service. Similarly, the search for classes tab appears before the browse course catalog tab because of the sequencing of the secondary tabs on the setup page.

When students access the Search tab, the search for classes tab appears by default because the Set as Default check box is selected for that tab on the setup page.
To change the name of a tab, modify the delivered text in the Message Text field on the Message Catalog page (PeopleTools, Utilities, Administration, Message Catalog) or add a new message to the message catalog and associate that message with the tab.

See PeopleTools: System and Server Administration

**Note:** If you map a component to more than one navigation path, you receive a warning message indicating that duplicate navigation entries exist for the component. You can save the settings, but the first navigation path to which a component is mapped in the setup is always used regardless of how many paths are mapped.

**Setting up the Enrollment Tab for Student Records Self Service**

You can use one of the two delivered variations of the shopping cart component under both the Plan, shopping cart tab and the Enroll, add tabs.

You can set up the add tab so that when students access that tab, they are taken to the version of the component that is used on the shopping cart tab—that is, the version with the Select check box for each class.

Here are the setup steps:

1. On the Navigation Tabs Setup page (for Student Records), select *ENROLLMENT* in the Main Tab field in the Main Tabs group box.
2. In the Secondary Tabs group box, select *ADD* in the Secondary Tab field.
3. In the Link Destination group box, select *SA_LEARNER_SERVICES_2* in the Menu Name field.

**Note:** Two rows exist in this group box. Ensure that you select *SA_LEARNER_SERVICES_2* in both rows.

4. Click Save.
Here is an example of the setup for the add tab using SA_LEARNER_SERVICES_2:

**Image: Example of setup for the add tab using SA_LEARNER_SERVICES_2**

This example illustrates the fields and controls on the Navigation Tabs Setup page. You can find definitions for the fields and controls later on this page.

### Navigation Tabs Setup

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Records Student Self-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main Tabs</strong></td>
<td></td>
</tr>
<tr>
<td>Display Sequence Nbr</td>
<td>30</td>
</tr>
<tr>
<td>Main Tab Label</td>
<td></td>
</tr>
<tr>
<td>Message Set Number</td>
<td>14690</td>
</tr>
<tr>
<td>Message Number</td>
<td>2012</td>
</tr>
<tr>
<td>Message Text</td>
<td>Enroll</td>
</tr>
<tr>
<td><strong>Secondary Tabs</strong></td>
<td></td>
</tr>
<tr>
<td>Display Sequence Nbr</td>
<td>20</td>
</tr>
<tr>
<td>Secondary Tab</td>
<td>ADD</td>
</tr>
<tr>
<td><strong>Sub-Navigation Label</strong></td>
<td></td>
</tr>
<tr>
<td>Message Set Number</td>
<td>14690</td>
</tr>
<tr>
<td>Message Number</td>
<td>672</td>
</tr>
<tr>
<td>Message Text</td>
<td>Add</td>
</tr>
<tr>
<td><strong>Link Destination</strong></td>
<td></td>
</tr>
<tr>
<td>Sequence</td>
<td>10</td>
</tr>
<tr>
<td>Menu Name</td>
<td>SA_LEARNER_SERVICES_2</td>
</tr>
<tr>
<td>Menu Bar Name</td>
<td>ACADEMICS</td>
</tr>
<tr>
<td>Item Name</td>
<td>SSR_SSENRL_CART</td>
</tr>
<tr>
<td>Component Name</td>
<td>SSR_SSENRL_CART</td>
</tr>
<tr>
<td>Market</td>
<td>GBL</td>
</tr>
<tr>
<td>Page Name</td>
<td>SSR_SSENRL_CART</td>
</tr>
<tr>
<td>Menu Action</td>
<td>Add</td>
</tr>
</tbody>
</table>
The add tab in Self Service uses the version of the component with the Select check box:

**Image: Example of the add tab in Student Center**

This example illustrates the fields and controls under the add tab in Student Center. You can find definitions for the fields and controls later on this page.

If you select SA_LEARNER_SERVICES in the Link Destination group box, the Select check box does not appear on the add tab in Self Service. The check box appears only on the shopping cart tab.

You can use the Message Catalog (PeopleTools, Utilities, Administration, Message Catalog) to change the title text that appears on the add and shopping cart tabs. The existing text appears on the previous example page.
Chapter 4

Setting Up Type Control

This section discusses how to set type controls.

Page Used to Set Up Type Control

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type Control</td>
<td>TYPE_CNTL_SETUP</td>
<td>Set Up SACR, Common Definitions, Self Service, Type Control</td>
<td>Set type controls to identify the types of names, addresses, phones, and email addresses for self-service users to view, edit, or delete.</td>
</tr>
</tbody>
</table>

Setting Type Controls

Access the Type Control page (Set Up SACR, Common Definitions, Self Service, Type Control).

Image: Type Control page

This example illustrates the fields and controls on the Type Control page. You can find definitions for the fields and controls later on this page.
Type Control

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

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

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

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

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

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

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

**Important!** You cannot change the Name Type (Primary) or the Address Types (Home and Mailing) values. These are set on the Campus Community Installation Names/Addresses page. PeopleSoft delivers these with Edit - No Delete type control level. You cannot apply the lesser restrictive control of Full Edit to them, however you can apply the more restrictive controls of Display Only or Do Not Display.

Self-services users can change data for these address types, but they cannot delete the types. Therefore the Delete (Home) address(es) and Delete (Mailing) address(es) links are never available on the Current Addresses page. If you modify these mapping types on the Installation Table, you must also modify the type control settings on the Type Control page.
Chapter 5

Setting Up Student Records Self-Service

Understanding Self-Service Enrollment Error Messaging Setup

The system generates enrollment request error messages during the process of adding and dropping classes. This feature is available not only for administrative but also for student self-service enrollment pages. However, for self-service users you must first:

1. Select the Enrollment Information check box in the Enrollment Preferences group box on the Enrollment setup page.

2. Select the Enroll Rqmt: Requisite check box on the Class Detail Options page. See "Setting Up Class Search Profiles" (PeopleSoft Campus Solutions 9.0: Student Records).

These two check boxes control whether requisite descriptions appear on the Enrollment Preferences page when students add a class or click a class link in which they are enrolled. They also determine whether:

- Requirement group descriptions appear on the View Results page in self-service enrollment.
- Descriptions appear when a student validates a shopping cart entry.

Related Links
"Processing Enrollment Transactions Through the Quick Enrollment Component" (PeopleSoft Campus Solutions 9.0: Student Records)

Setting Up Self-Service Features for Student Records

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

This section discusses how to:

- Define Student Records setup.
- Defining other Student Record self-service options.
- Set up weekly schedule time periods.
- Set up self-service graduation application and tracking.
- Defining a name type display.
- Configure name display rules.
- Set up self-service graduation options.
• Set up other graduation options.

### Pages Used to Set Up Self-Service Features for Student Records

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment</td>
<td>SSR_SS_ENRL_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment</td>
<td>Enable self-service features and define parameters and rules for self-service Student Records functionality.</td>
</tr>
<tr>
<td>Other</td>
<td>SSR_SS_OTHR_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Records, Other</td>
<td>Controls the display of phone details for advisors and committee members on the My Advisors page, controls whether advisors have access to non-advisee data from the View My Advisees page, and provides options for how to search for a Faculty member.</td>
</tr>
<tr>
<td>Weekly Schedule Time Periods</td>
<td>SETUP_TIME_PERIODS</td>
<td>Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods</td>
<td>Define the times that define the ranges of time that the system displays on the Weekly Schedule page for both instructors and students. The PeopleSoft system delivers a set of time periods for every hour in a 24-hour period. You can modify or add to these values to meet your business requirements; for example, you can add half-hour intervals.</td>
</tr>
<tr>
<td>Academic Institution 8</td>
<td>SSR_INST_TBL_GRAD</td>
<td>Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 8</td>
<td>Set up self-service graduation at the institution level; however, these settings can be overridden at the career or program level.</td>
</tr>
<tr>
<td>Name Display Type</td>
<td>SCC_NMD_TYP_TBL</td>
<td>Click the Add Name Display Type link on the Academic Institution 8 page.</td>
<td>Define how names will appear for graduation.</td>
</tr>
<tr>
<td>Name Display Type Parameters</td>
<td>SCC_NMD_TYP_PRM</td>
<td>Click the Edit Parameters button on the Name Display Type page.</td>
<td>Further define how names will appear.</td>
</tr>
<tr>
<td>Self Service Options</td>
<td>SSR_ACDCAR_SELSRV</td>
<td>Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Self Service Options</td>
<td>Set up for career-specific usage of the graduation tracking process.</td>
</tr>
<tr>
<td>Graduation</td>
<td>SSR_PROG_TBL_GRAD</td>
<td>Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Graduation</td>
<td>Set up for program-specific usage of the graduation tracking process.</td>
</tr>
</tbody>
</table>
Defining Student Records Setup

Access the Enrollment page (Set Up SACR, Common Definitions, Self Service, Student Records, Enrollment).

Image: Enrollment page

This example illustrates the fields and controls on the Enrollment page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Update DateTime</strong>: 18/10/06 8:14:15AM</td>
<td><strong>User ID</strong>: SAMPLE</td>
</tr>
<tr>
<td><strong>Note</strong>: Initial Installation</td>
<td></td>
</tr>
</tbody>
</table>

### Enrollment Shopping Cart

- **Allow Validation**
  - **Time Conflict**
  - **Repeats**
  - **Requisites**
  - **Unit Limits**
  - **Allow During Enroll Action**

### Enrollment Features

- **Use Wait Listing**
- **Swap Enrollment Action**
  - **Enroll with Drop if Enroll**
  - **Swap**

### Enrollment Preferences

- **Display**:
  - **Enrollment Information**
  - **Class Notes**
  - **Class Meeting Information**

- **Variable Unit Increments**: 1.00

### Additional Self Service Setup

- **Display Typically Offered Data**
- **Show Student Photos on Rosters**
- **Display FERPA Statement link in Faculty Center**

**Note** Enter descriptive information about the setup. This field is for informational purposes only.

### Enrollment Shopping Cart

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

**Time Conflict**
Select this check box if you want the Enrollment Engine to check time conflicts while validating Shopping Cart entries.

**Repeats**
Select this check box if you want the Enrollment Engine to check repeats while validating Shopping Cart entries.

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

**Requisites**
Select this check box if you want the Enrollment Engine to check requisites while it validates Shopping Cart entries.

**Unit Limits**
Select this check box if you want the Enrollment Engine to check unit limits while it validates Shopping Cart entries.

**Enrollment Features**

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

**Swap Enrollment Action**
This field controls the processing of enrollment requests submitted from the Swap component in student self-service.

Select one of these options:

*Enroll with Drop if Enroll:* Select this check box to enable Drop if Enroll processing for self-service swaps. If you select this check box, when a student swaps from one class to another or to a different enrollment component of the same class, the enrollment engine drops the student from the class that the student wants to swap only after the student is enrolled in the preferred class. The enrollment engine does not drop a student who is on the wait list for the preferred class. The enrollment engine processes the preferred class with an enrollment action of Enroll.

*Swap:* If you select this check box, when a student swaps from one class to another (or a different enrollment section of the same class), the enrollment engine drops the student from the unwanted class if they are successfully enrolled or when they are placed on the wait list in the preferred class.
Note: If the swap is for non-enroll components only, the request is processed with a Swap action regardless of the option that is selected on this setup page.

When a student tries to swap only the non-enroll component(s) on the Swap component (no change to the enrollment component), the transaction is submitted to the enrollment engine with an enrollment action of Swap (instead of Enroll with Drop if Enroll). This ensures that the student is enrolled (or wait listed) in the right combination of enrollment and non-enroll components. For example, if a student is enrolled in CHEM 102 lecture section 1 plus related lab 1A and tries to swap to a closed lab, 1B, electing to wait list, the transaction is submitted as non-enroll swap (for example, swap section 1 to section 1 with related section 1B) where the student’s status will be changed from enrolled to wait listed for the lecture section, wait listed in the non-enroll lab section (1B), and dropped from their original lab section (1A).

Enrollment Preferences
Select the information that you want to appear in student self service.

Enrollment Information
Select to display enrollment requisite information about the self-service Enrollment Preferences page during the enrollment process.

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

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

Variable Unit Increments
Enter a value to control how unit increments appear to students when students select a unit value for a variable unit course. For example, if students are allowed to enroll in half units, enter 0.50 in this field. A student who enrolls in a class with a variable unit range of 1 to 3 units is then presented with the following options: 1.00, 1.50, 2.00, 2.50, 3.00.

Additional Self Service Setup

Display Typically Offered Data
Select to display when a course is usually offered at the institution. If this check box is selected, the data appears on a variety of self-service pages, including Browse Course Catalog, Course Detail, My Planner, and My Academic Requirements. If you clear the check box, the system does not display typically offered data within self-service, but it continues to display it on administrative pages.
Typically offered values are institutionally defined within a typically offered setup page. They are then assigned to courses on the Course Catalog - Offerings page.

**Show Student Photos on Rosters**
Select this check box if you want student photos to appear on the class and advisee rosters in the Faculty Center.

### Defining Other Student Record Self-Service Options
Access the Other page (Set Up SACR, Common Definitions, Self Service, Student Records, Other).

**Image: Other page**

This example illustrates the fields and controls on the Other page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Update Date/Time: 27/01/2010 8:34:18AM</td>
<td>User ID: SAMPLE</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
</tbody>
</table>

**My Advisor Pages**

Use the My Advisor Pages group box to control the display of phone details of advisors, committee members, or both on the My Advisors page.

**Note:** You should select the same advisor phone number value on this page and on the Student Center Options page in the Student Center component (SSS_STUDENT_CENTER).
## Advisor Self Service

**Allow access to non-advisees**  
If this check box is selected, the VIEW DATA FOR OTHER STUDENTS button becomes available on the View My Advisees – Advisee Roster page in Faculty Center. The check box is selected by default.

Advisors can access student data for non-advisees by clicking the VIEW DATA FOR OTHER STUDENTS button, which takes them to a search page.

If the Allow access to non-advisees check box is cleared, advisors cannot access student data for non-advisees. The VIEW DATA FOR OTHER STUDENTS button is hidden. If, when viewing an advisee's data, an advisor clicks the Return to Search button, the advisor is taken to a search page on which only their advisees are available.

## Faculty Search

Use this group box to control the data that you want to search against when you use the Locate a Faculty Member page in Faculty Center.

You can search against the entire population in the database or against data in the Instructor/Advisor Table component (INSTR_ADVSR_PERS).

### Personal Data

Select this option to search against the entire population in the database when you use the Locate a Faculty Member page in Faculty Center.

### Instructor/Advisor Table

Select this option to search against data in the Instructor/Advisor Table component when you use the Locate a Faculty Member page in Faculty Center.

---

**Warning!** You must be careful when setting up Self Service Faculty Search. You do not have to use the Instructor/Advisor Table component to assign instructors to classes. You should therefore select the option to edit the search for faculty members against data in the Instructor/Advisor Table component only if the Instructor/Advisor option is selected in the Edit Instructor Against group box on the Academic Organization Table page.

## Student Textbook Information

**Display Textbook Summary link**  
If you select the Student Self Service and Instructor Self Service check boxes, the View Textbook Summary link appears on the Student Self Service, My Class Schedule page and the Faculty Center, My Schedule page. Students and faculty staff can use the link to access a summary of the textbook assignments for each of their classes for the term.

Clear the check boxes if you do not use the textbook feature or if you want to disable access to the Textbook Summary page.
Related Links
Using the Self-Service Faculty Center
"Designating Approved Instructors and Advisors" (PeopleSoft Campus Solutions 9.0: Student Records)

Setting Up Weekly Schedule Time Periods

Access the Weekly Schedule Time Periods page (Set Up SACR, Product Related, Student Records, Enrollment, Weekly Schedule Time Periods).

**Time**

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

This field also controls the self-service exam schedule weekly view, in both the Student Center and Faculty Center. Hours can be subdivided into 30- and 15-minute intervals.

---

**Note:** To print the weekly schedule in full color, Internet Explorer users must change their settings as follows: Tools, Internet Options, Advanced, Printing, select "Print background colors and images." Without this setting, the schedule will print, but without background color.
Setting Up Self-Service Graduation Application and Tracking

Access the Academic Institution 8 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 8).

Image: Academic Institution 8 page (1 of 2)

This example illustrates the fields and controls on the Academic Institution 8 page (1 of 2). You can find definitions for the fields and controls later on this page.
Image: Academic Institution 8 page (2 of 2)

This example illustrates the fields and controls on the Academic Institution 8 page (2 of 2). You can find definitions for the fields and controls later on this page.

**Graduation Tracking**

**Graduation Tracking**

Select this check box to set up graduation values at the institution level. If you select this check box, then all careers and programs will use graduation tracking. If you do not, then a selection made at either the career or the program level will determine whether graduation tracking is used. In addition, if you select this check box, the system creates a graduation tracking row during the self-service graduation application.

**Graduation Review Status**

Select a value to be used during the self-service graduation application process.
Note: The remaining check boxes determine whether these grids appear on the Graduation Tracking page. This is determined at the institution level.

Graduation Self-Service

The Name Display framework provides a configurable solution that allows institutions to define how a display name will appear for graduation. Note that this functionality only appears on the View Graduation Status page in self service. The function called GetDegreeName is located in the FUNCLIB_SR.NAME_DISPLAY_TYPE.FieldFormula. This function returns the degree name that is derived using the Name Display Type settings on the Academic Institution Table component. The function requires an institution value and an EmplID value as parameters, and returns a string value of the degree name. Use this function to retrieve the derived Degree Name when needed for reporting or other processing.

**Self Service Eligible to Apply**

When this check box is selected, the self-service Apply for Graduation process looks for a degree checkout status of Eligible to Graduate on the student's academic program. The institution can set the degree checkout status using the Graduation Processing process to limit the students who can apply to graduate.

**Program Action Reason**

Enter the program action reason used in the self-service Apply for Graduation process.

**Show Name**

Select this check box to allow the student's name to appear on the View Graduation Status page.

**Name Link Label**

Enter text that will appear as a link when the Show Name check box is selected. It will direct students to the Self Service Campus Community page where they can enter the name they want to use for graduation. The name type identified in the setup will be the name type edited or created.

**Name Display Type**

Click the Add Name Display Type link or manually enter a Name Display Type, then click the Edit Name Display link.

**Name Type**

This is the name type that will be added or edited through the Graduation self-service page. The system formats this name type based on the name display type entered above.

**Show Address**

Select this check box to allow the student's address to appear on the View Graduation Status page.

**Address Usage**

Identify value to use for the display of the address on the View Graduation Status page.

**Address Link Label**

Enter text that will appear as a link when the Show Address check box is selected. It will direct the student to the Self Service Campus Community page where addresses can be changed in self service.
Graduation Name Addr Message

Enter text to direct the student how to make name and address changes. These directions appear on the View Graduation Status page.

Grad Status Alternate Label

The fields in this group box allow the institution to display a different message for the various degree checkout values.

Defining a Name Type Display

Access the Name Display Type page (click the Add Name Display Type link on the Academic Institution page).

Image: Name Display Type page

This example illustrates the fields and controls on the Name Display Type page. You can find definitions for the fields and controls later on this page.

The Name Display framework provides a configurable solution that allows institutions to define how a display name will appear for graduation. Note that this functionality only appears on the View Graduation Status page in self service.

There are four delivered Style choices; these are currently not enabled for the View Graduation Status page.

Click the Edit Parameters button to access the Name Display Type Parameters page, where you can further define how names will appear.
Configuring Name Display Rules

Access the Name Display Type Parameters page (click the Edit Parameters button on the Name Display Type page).

Image: Name Display Type Parameters page

This example illustrates the fields and controls on the Name Display Type Parameters page. You can find definitions for the fields and controls later on this page.

Name Types

Name Type
Select a name type, which is defined on the Name Type Table page. You can assign multiple name types (such as Primary, Preferred, and Legal) to each Name Display Type.

Order
Rank the Name Type in the Name Type hierarchy for the Name Display Type.

Default Name Field
Select from three delivered options: Use Formal Name, Use Name, or Use Name Display.

Country Rules

You can define multiple sets of country rules for each Name Type. For example, your institution might define English country rules for the primary name type and Belgian country rules for the preferred name type. If you specify country rules, then you must select an option in the Name Field group box.
### Format Using

The system only displays PeopleSoft-supported countries in this list.

### Test EmplID

Add person IDs to this grid, which allows you to select test IDs to see how a name will actually appear on a page based on the rules entered. You can only add IDs whose names include parts associated with the country. The test EmplID must have the name type you are formatting to see anything in the displays as area.

### Name Field

Use the fields in this group box to override the Default Name Field option in the Name Types group box and customize names for a specific country format. You can define the name's appearance part by part, as you go; the appearance of each ID added to the Name Display Test group box will refresh on any field change you make. There are four options in this group box: Use Name Display, Use Formal Name, Use Name, and Use Name Parts. If you select the Use Name Parts option, the Name Parts grid appears. The grid displays name fields specific to the country selected.

#### Part Type

Available options are: Name Field, Space, or User Defined.

*Name Field:* contains values that are dependent on the selected country format such as First Name, Middle Name, Last Name.

*Space:* allows you to add a single space between other part types. Spaces can only be specified from Part 2 onward.

*User Defined:* allows you to define other characters (such as commas or periods), or a character string up to 35 characters long.

#### Name Field

The values that appear in this column are country-specific, based on your selection in the Format Using field.

#### Dependency

Enter a number to specify a dependent part, so that parts will only be displayed when their dependent parts contain a value. For example, if a prefix is listed but a person has no prefix associated with their name record, the system ignores the entire prefix (name part, punctuation, and spaces) and moves to the next part in the list.

### Ignore Criteria

This group box is hidden by default; select the Ignore Rules check box to make it appear. Use the fields here to ignore any Name Field parts of a name. For example, you can make selections here to remove any special characters (such as * or !) used as placeholders for people with single names in your database.
Setting Up Self-Service Graduation Options

Access the Self Service Options page (Set Up SACR, Foundation Tables, Academic Structure, Academic Career Table, Self Service Options).

Image: Self Service Options page

This example illustrates the fields and controls on the Self Service Options page. You can find definitions for the fields and controls later on this page.

Override Institution Setup

If you select this check box, the Graduation Tracking and Graduation Self-Service group boxes appear.

Use Graduation Tracking

Select this check box to add a row to the graduation tracking process during self-service apply for graduation. Then select the appropriate Graduation Review Status.

Program Action Reason

Select the appropriate program action reason.
Setting Up Other Graduation Options

Access the Graduation page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Graduation).

Image: Graduation page

This example illustrates the fields and controls on the Graduation page. You can find definitions for the fields and controls later on this page.

Override Inst & Career Setup

If you select this check box, the Graduation Tracking and Graduation Self-Service group boxes appear.

Use Graduation Tracking

Select this check box to add a row to the graduation tracking process during self-service apply for graduation. Then select the appropriate Graduation Review Status.

Program Action Reason

Select the appropriate program action reason.

Setting Up a Self-Service Student Center

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

This section provides an overview of defining student center setup options and discusses how to define self-service Student Center setup options.

Understanding Defining Student Center Setup Options

The Student Center page is a self-service page that provides students a single entry point from which to navigate to student-related transactions. It also provides a single location where students can see information that is important to them, such as their class schedule, enrollment dates, and account information.
Using the Student Center Options page in conjunction with security setup, you can configure the Student Center page to control the user's experience. On the Student Center Options page, you can decide which major sections will appear on the Student Center page. You can also use the Student Center Options page to configure some of the individual items that will appear on the Student Center page. Using security setup, you can limit student access to self-service transactions. You must use the Student Center Options page in conjunction with security setup to create a self-service experience for students. For example, if your institution uses the enrollment functionality in PeopleSoft Student Records but does not use swap functionality, you can show the Academics section by selecting the Show Academic Section option on the Student Center Options page but not grant students access to the Swaps page using security. In this case, the Academic section would appear on the Student Center, but the swap functionality would not. Also, not displaying a feature on the Student Center does not remove it from the navigation. To remove a feature from the navigation, you must use security.

### Page Used to Set Up a Self-Service Center

<table>
<thead>
<tr>
<th><strong>Page Name</strong></th>
<th><strong>Definition Name</strong></th>
<th><strong>Navigation</strong></th>
<th><strong>Usage</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Center Options</td>
<td>SSS_STDNCTR_OPT</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Center</td>
<td>Define the sections that you want to appear to your students in the self-service Student Center.</td>
</tr>
</tbody>
</table>
Defining Self-Service Student Center Setup Options

Access the Student Center Options page (Set Up SACR, Common Definitions, Self Service, Student Center).

Image: Student Center Options page (1 of 2)

This example illustrates the fields and controls on the Student Center Options page (1 of 2). You can find definitions for the fields and controls later on this page.

### Student Center Options

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Update Date/Time</td>
<td>08/15/2013 4:53:30 AM</td>
</tr>
<tr>
<td>User ID</td>
<td>PSUK</td>
</tr>
<tr>
<td>Note</td>
<td>Initial Installation</td>
</tr>
</tbody>
</table>

#### Major sections to be displayed on the Student Center

- Show Academic Section
- Show Finances Section
- Show Personal Info Section
- Show Admissions Section
- Show Holds Section
- Show To Do List Section
- Show Milestone List Section
- Show Enrollment Dates Section
- Show Advisor Section
- Show Links Section

#### Personal Information Section

- Type of addresses to display:
  - Address Box 1 (left) Permanent Address
  - Address Box 1 Link Label: Permanent Address
  - Address Box 2 (right) Billing Address
  - Address Box 2 Link Label: Billing Address
- Display Phone Type: Main
- Phone Link Label: Primary Phone
- Display E-mail Type: Home
- Email Link Label: Home E-mail
- Privacy settings link:

#### Links Section

<table>
<thead>
<tr>
<th>Section name</th>
<th>Title</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Engines</td>
<td>Yahoo</td>
<td><a href="http://www.yahoo.com">http://www.yahoo.com</a></td>
</tr>
<tr>
<td>Other Links</td>
<td>Amazon</td>
<td><a href="http://www.amazon.com">http://www.amazon.com</a></td>
</tr>
</tbody>
</table>
Image: Student Center Options page (2 of 2)

This example illustrates the fields and controls on the Student Center Options page (2 of 2). You can find definitions for the fields and controls later on this page.

**Note**

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

### Major Sections to Be Displayed on the Student Center

**Show Academic Section**

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

**Show Finances Section**

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

**Show Personal Info Section (show personal information section)**

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

**Show Admissions Section**

Select to show the Admissions Section on the self-service Student Center page. This section contains links to PeopleSoft Recruiting and Admissions functionality, such as applying to another academic program, requesting admissions information from your institution, or checking on the status of an application. If you select this check box, the fields in the Admissions Section group box become available for edit.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Show Holds Section</strong></td>
<td>Select to show the Holds Section on the self-service Student Center page. If you select this check box, the fields in the Holds Section group box become available for edit.</td>
</tr>
<tr>
<td><strong>Show To Do List Section</strong></td>
<td>Select to show the To Do List Section on the self-service Student Center page. If you select this check box, the field in the To Do List Section group box becomes available for edit.</td>
</tr>
<tr>
<td><strong>Show Milestone List Section</strong></td>
<td>Select to show the Milestones section on the self-service Student Center page. In the Milestones section, students click the details link to access the Student Milestones self-service page. Advisors can also access milestone information from the Advisor Center. The Milestone Table setup controls which milestones are available in the list on the Student Center page. See &quot;Setting Up Milestones&quot; (PeopleSoft Campus Solutions 9.0: Student Records)</td>
</tr>
<tr>
<td><strong>Show Enrollment Dates Section</strong></td>
<td>Select to show the Enrollment Dates Section on the self-service Student Center page. This section contains enrollment appointments, validation appointments, and open enrollment dates.</td>
</tr>
<tr>
<td><strong>Show Advisor Section</strong></td>
<td>Select to show the Advisor Section on the self-service Student Center page. This section displays academic advisors and committees assigned to the student. Within the Advisor Section, students click the Details link to go to the View My Advisors page.</td>
</tr>
<tr>
<td><strong>Show Links Section</strong></td>
<td>Select to show the Links Section on the self-service Student Center page. If you select this check box, the fields in the Links Section group box become available for edit.</td>
</tr>
</tbody>
</table>

**Personal Information Section**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Box 1 (left) and Address Box 2 (right)</td>
<td>Enter the address types to display in the Personal Information Section of the Student Center page. Only address types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.</td>
</tr>
<tr>
<td>Address Box 1 Link Label and Address Box 2 Link Label</td>
<td>Enter the label to be displayed for the address links on the Student Center page.</td>
</tr>
<tr>
<td>Display Phone</td>
<td>Select to display the student's phone number on the Student Center page. Enter a phone type to display. Only phone types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.</td>
</tr>
<tr>
<td>Phone Link Label</td>
<td>Enter the label to be displayed for the phone link on the Student Center page.</td>
</tr>
</tbody>
</table>
**Display E-mail**  
Select to display the student's email address on the Student Center page.

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

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

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

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

### Admissions Section

**Display Action Column**  
Select to display the Action column in the Admissions section on the Student Center page. The Action column—which displays the View Status and Accept/Decline links—appears only when there is an allowable action for the applicant to take. If Display view status link is selected here on the setup page and a checklist is associated with the application and the checklist is incomplete, the View Status link appears on the Student Center page. If Display Accept or Decline link is selected here on the setup page and the applicant is admitted, the Accept or Decline link appears on the Student Center page.

**Display view status link**  
Select to display the View Status link, which accesses the to-do list(s) associated with the application.

**Display Accept or Decline link**  
Select to display the Accept or Decline link, which accesses the Accept Admissions page.

### Holds Section

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

**Display monetary value**  
Select to display the monetary value of the holds on the Student Center page.
To Do List Section

**Show <> checklist items at a time**
Select the number of checklist items that you want to display at one time. You can display all checklist items or from 1 to 10 checklist items or you can choose to not display checklist items at all. The system sorts checklist items by earliest due date on the Student Center page.

**Show <> tasks at a time**
Select the number of tasks (activity guide instances) that you want to display at one time. You can display all tasks or from 1 to 10 tasks or you can choose to not display tasks at all. The system sorts tasks by earliest due date on the Student Center page.

**Note:** If you have selected the Show To Do List Section check box, then at least one checklist item or one task must be enabled to be displayed. That is, if the Show To Do List Section check box is selected, then you should not select None for both Show <> checklist items at a time and Show <> tasks at a time. Also, note that if you have selected the Show To Do List Section check box and there are no open checklist items or tasks for the student, then the To Do List section of the Student Center page indicates that there are no to do's for the student.

Advisor Section

**Show advisor phone number**
Select to indicate whether to use an advisor's preferred phone number or a particular phone type when displaying the advisor's phone number in the Advisor section of the Student Center. This setup controls the phone number on the Student Center page only.

**Note:** You should select the same Advisor phone number value on this page and on the Other page in the Student Records component.

Milestone List Section
Select the number of milestones that you want to display at one time. The system sorts milestone items based on the order in which the milestones were added to the student's record.

Links Section
Use this group box to define link sections that will be available on the Student Center page. By defining sections and URLs, you can provide links to institution websites such as University Library, Campus Directory, University Home Page, Free Application for Federal Student Aid (FAFSA), and others. You can define three sections with a maximum of three URLs per section.
Chapter 6

Setting Up Student Financials Self Service

Prerequisites for Setting Up Student Financials Self Service

Before students can make payments through Student Financials self service, you must:

- Set up SF business units.
- Establish charge priorities.
- Establish payment overall priorities.
- Establish an SF term default.
- For each SF institution set established, you must create a corresponding setID and define the corresponding tableset control value, particularly for SF11_WEB (Internet Pymnts — INSTITUTION SET).
- Establish at least one Payment Merchant per third party merchant ID.
- Establish at least one SF merchant ID per payment type (credit card, eCheck, or both) that is to be supported by your institution.
- Select the Accept Self-Service Payments check box on all appropriate SF institution set parameters.
- Assign an SF institution set to students.

See:

- "Setting Up Business Units" (PeopleSoft Campus Solutions 9.0: Student Financials)
- "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials)

Setting Up Payment Merchants

Setting up Payment merchants enables you to set up electronic payment merchants and support the ePayment API framework.

See "Setting Up Payment Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials).

See Electronic Payment Integration Developer's Reference Guide. The guide is posted to My Oracle Support, ID 968171.1.
Setting Up SF Merchants

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

See "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials).

Setting Up Institution Sets

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

- Define basic institution set parameters.
- Define self-service electronic payments (ePayments) for institution sets.
- Define self-service business units for institution sets.

Understanding Institution Sets

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

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

You must set up an institution set and attach it to each student for any self-service features to function. You attach the institution set to students through the User Profile process in PeopleSoft Campus Community or individually through Student Financials Security.

Related Links
"Setting Up Business Units" (PeopleSoft Campus Solutions 9.0: Student Financials)
"Preparing for User Profiles Management" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)

Pages Used to Set Up Institution Sets

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Options</td>
<td>INSTITUTION_SET_01</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, General Options</td>
<td>Define basic institution set parameters.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Institution Set Privacy Policy</td>
<td>SSF_INST_SET_04</td>
<td>Click the Privacy Policy link on the Electronic Payments page.</td>
<td>Define a privacy policy for your institution.</td>
</tr>
<tr>
<td>Business Units</td>
<td>INSTITUTION_SET_02</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Business Units</td>
<td>Define business unit parameters.</td>
</tr>
</tbody>
</table>
Defining Basic Institution Set Parameters

Access the General Options page ((Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, General Options).

Image: General Options page (1 of 2)

This example illustrates the fields and controls on the General Options page (1 of 2). You can find definitions for the fields and controls later on this page.
This example illustrates the fields and controls on the General Options page (2 of 2). You can find definitions for the fields and controls later on this page.

### Manage Banks Options

<table>
<thead>
<tr>
<th>Additional Details URL:</th>
<th>Bank agreement details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help URL:</td>
<td>Bank details help</td>
</tr>
<tr>
<td>Display Agreement</td>
<td></td>
</tr>
</tbody>
</table>

### Direct Deposit Options

<table>
<thead>
<tr>
<th>Additional Details URL:</th>
<th>Direct deposit agreement details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help URL:</td>
<td>Direct deposit help</td>
</tr>
<tr>
<td>Maximum Distributions:</td>
<td>3</td>
</tr>
<tr>
<td>Display Subsequent Agreement</td>
<td></td>
</tr>
</tbody>
</table>

### Base Currency

Select the type of currency that you want to use for your credit card transactions. The default value for this field is the base currency from SF Business Unit setup.

### Self Service Options

#### Accept Self Service Payments

Select to accept self-service payments over the internet. This selection is specific to this institution set, not to the SF business units that are attached on the Business Units page. Selecting this option requires that you attach at least one SF business unit that is defined to accept self-service payments.

#### Accept Miscellaneous Purchases

Select to allow students to select and purchase items or services. This flag controls whether the Accept Miscellaneous Purchases option appears in the Other Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.

#### Allow Payment Plan Enrollment

Select to allow students to enroll in payment plans. This flag controls whether the Payment Plan option appears in the Other Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.

#### Display 1098–T Self Service

Select to display and to allow access to the 1098-T Self Service option for students in this institution set. This check box controls whether the 1098-T option appears in the other financial drop-down list box in Student Center and whether the link appears at the bottom of the Account Inquiry page.

#### Display Student Permissions

U.S. Department of Education regulations require that federal financial-aid awards be used to pay only allowable charges for the period of enrollment covered by the aid year in which those
funds were awarded. Regulations require schools to collect individual authorization from a student to allow funds to pay for nonallowable charges such as library fines and parking fees or for charges for the prior year immediately preceding the current aid year.

Select to allow access to the Grant Student Permissions option for students in this institution set.

The student cannot revoke permission using Self Service; only the administrator can do this.

**Grant Student Permissions**

Select to display and to allow access to the Grant Permissions option for students in this institution set.

This check box appears only if the Display Student Permissions check box is selected.

**Tuition Calc Required (tuition calculation required)**

Select if you want the system to automatically calculate tuition whenever a student accesses the Account Inquiry component or the Make a Payment component. The system calculates tuition in self service only if the following four conditions are met:

- The self service Tuition Calc Required check box in the SF Institution Set component is selected.
- The Calc Required column value is equal to Y in the STDNT_CAR_TERM table.
- The student is activated in the term.
- The Auto Calculate Self Service check box on the Tuition Calculation Control page is selected for the term.

See "Specifying Tuition Calculation Parameters" (PeopleSoft Campus Solutions 9.0: Student Financials).

---

**Note:** The system does not automatically calculate tuition when a student accesses the Student Center. In addition, tuition calculation is never invoked from the Student Services Center or Student Services Center (Student). Therefore, consider selecting the Display Tuition Calc Message check box so that the student knows that the balance that appears on the Student Center might not reflect recent changes and the student has to access the Account Inquiry page for the updated balance. Consider your use of the Tuition Calc Required check box carefully. Requiring tuition calculation uses a great deal of system processing resources, but account balances might not otherwise reflect recent changes.

---

**Days in future for 'due now'**

Based on the number of days you enter here, the system controls the due now and future due dollar amounts displayed on the Student Center page as well as on the Account Inquiry - Account Summary page. The formula used to calculate the due
now amount is any charges incurred through the current date plus the number of days specified in this field. The formula used to calculate the future due amount is any charges incurred after the current date plus the number of days specified in this field. Any charges incurred through the current date plus the number of future days entered in this field controls both the amount due now and the future due amount. Enter the number of future days.

For further information, refer to the Example of How the Days in Future Field Is Calculated documentation.

**Display Tuition Calc Message**

Select to display the following tuition calculation messages for students:

- If you select the Tuition Calc Required check box and the Auto Calculate Self Service check box, and the Calc Required column value is equal to \( Y \) in the STDNT_CAR TERM table for a student, this message appears on the Student Center page: *This may not reflect recent changes to your tuition and fees. For an updated balance, click on Account Inquiry.*

- If you do not select the Tuition Calc Required check box, then regardless of the Calc Required column value and whether you select the Auto Calculate Self Service check box, this message appears on the Student Center, Account Summary, and Charge Details pages: *This may not reflect recent changes to your tuition and fees.*

**Manage My Bank Accounts**

Select to enable the Manage My Bank Accounts component in Self Service. Students use the component to set up and maintain their bank account details.

**Allow Change in Country**

Select to allow students to set the country and currency of their bank account in the Manage My Bank Accounts Self Service page. Otherwise, the country is derived from the HRMS Installation setup and the currency is derived from the SF Institution Set setup.

This check box is available only when you select the Manage My Bank Accounts check box. By default, Allow Change in Country is deselected.

See Using Account Services

**Allow Use in Service**

When you select this check box, SSF_FINANCIALS web service extracts student account information. However, if you use SSF_FINANCIALS web service and this check box is deselected and the institution set is attached to a student, the web service throws an error and will not be able to extract student account information.
You also select this check box to enable the Maximum Payments in Service field.

See "Using the SSF_FINANCIALS Web Service" (PeopleSoft Campus Solutions 9.0: Student Financials)

**Maximum Payments in Service**

Set the number of payment rows that SSF_FINANCIALS web service should return.

SSF_FINANCIALS web service extracts and then sends the number of payment rows that you define in this field.

See "Using the SSF_EPAYMENT_TRANS Web Service" (PeopleSoft Campus Solutions 9.0: Student Financials)

**Direct Deposit Enrollment**

If you select this check box, the Enroll in Direct Deposit component is available in Self Service. Students use the component to enroll in direct deposit and specify how refunds are distributed between their bank accounts.

See Understanding Student Financials Self Service.

**Example of How the Days in Future Field Is Calculated**

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

<table>
<thead>
<tr>
<th>Charge</th>
<th>Date Incurred</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>July 1, 2006</td>
<td>1,000.00 USD</td>
</tr>
<tr>
<td>Fee</td>
<td>September 5, 2006</td>
<td>50.00 USD</td>
</tr>
<tr>
<td>Room</td>
<td>November 1, 2006</td>
<td>500.00 USD</td>
</tr>
</tbody>
</table>

If the current date is September 1, 2006, and you enter 35 in the Days in future for 'due now' field, then the due now charges will equal 1,050.00 USD and the future due will equal 500.00 USD.

If the current date is October 1, 2006, and you enter 35 in the Days in future for 'due now' field, then the charges due now will equal 1,550.00 USD, and the future charges will equal zero.

**Account Inquiry**

The selections made in this group box determine what students see in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM). For instance, if you clear the Display Account Activity check box, students do not see the activity page. Check boxes that are indented below a check box refer to more specific options related to the display feature on that page.

**Display Account Activity**

Select to display the Account Activity page, including charges, payments, financial aid, and refunds for the student. The activity is controlled by filter options on the activity page—the system displays six months of activity by default.
**Display Charges Due**
Select to display the Charges Due page. Four grids are displayed on this page, three of which are optional: Display Due Date Detail, Display Charge Detail, and Display Invoice Due.

The Display Charges Due grid rolls up all charges by unique due date to be presented as a summary to the student.

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

The Display Charge Detail grid displays the details of each charge. On this grid, the student has the opportunity to look deeper into charges containing multiple due dates.

The Display Invoice Due grid displays details of charges by billing invoice ID date.

**Display Payment History**
Select to display the Payments page. You can also choose to allow payment drilldown. For any successfully posted payments, the student can see which charges were reduced by those payments if the Allow payment drilldown check box is selected.

**Display Pending Payments**
Select to display the student's pending payments on the following pages:

- Account Inquiry - Payments tab: Pending Payments grid.

If this check box is cleared, then the student's pending payments do not appear anywhere in self service.

**Include Pending Payments**
If this check box is selected, then the student's balance is reduced by the pending payment amount. This check box must be used in conjunction with the Display Pending Payments check box for the remaining balance amount to be reduced by any pending payments made.

If this check box is selected, the total due amount is reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid.

If this check box is cleared, then the total due amount is not reduced by the pending payment amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending payment amount.

**Display Pending Financial Aid**
Select to display anticipated aid as a line item on the Account Inquiry - Account Summary tab: What I Owe grid and the Account Inquiry - Pending Financial Aid page.

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

If this check box is cleared, then the student's anticipated aid does not appear anywhere in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM).

**Include Pending Financial Aid**

If this check box is selected, the student's balance is reduced by the anticipated aid amount. This check box must be used in conjunction with the Display Pending Financial Aid check box for the remaining balance amount to be reduced by any anticipated aid.

If this check box is selected, the total due amount is reduced by the anticipated (or pending financial) aid amount on the Account Inquiry - Account Summary tab: What I Owe grid.

If it is cleared, then the total due amount will not be reduced by the anticipated aid amount on the Account Inquiry - Account Summary tab: What I Owe grid. The remaining balance amount is not reduced by the pending financial aid amount.

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

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

**Manage Bank Options**

This group box provides additional configuration for bank account setup and maintenance.

**Additional Details URL**

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Additional Details link appears on the Manage My Bank Accounts - Agreement page. When students click the link, they access the URL that you have set up here.

**Help URL**

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Help link appears on the Manage My Bank Accounts - Add Bank Account Details page and the Manage My Bank Accounts - Edit Bank Account Details. When students click the link, they access the URL that you have set up here.

**Display Agreement**

If you select this check box, the Manage My Bank Accounts - Agreement page appears when students create their initial bank account and the Agreement table (Bank Account) is updated.
The agreement does not appear when students add subsequent bank information.

**Direct Deposit Options**

This group box provides additional configuration for direct deposit setup and maintenance.

**Additional Details URL**

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Additional Details link appears on the Enroll in Direct Deposit - Agreement page. When students click the link, they access the URL that you have set up here.

**Help URL**

The values available in this field are based on the PeopleTools URL identifier.

If you select a value here, the Help link appears on the Enroll in Direct Deposit - Add Direct Deposit page and the Enroll in Direct Deposit - Edit Direct Deposit page. When students click the link, they access the URL that you have set up here.

**Maximum Distributions**

Use this field to control the maximum number of direct deposit distributions that a student can set up in Self Service.

A value of 1 appears by default.

You can only enter whole numbers—for example, 4.5 is not allowed.

Enter a value of 1 if you want refunds to always be disbursed to only one account.

**Display Subsequent Agreement**

If you select this check box, then, after the student has signed an initial agreement (using the Direct Deposit Agreement page - DD Enroll), an Agreement page appears every time that the student edits the direct deposit instructions. The Agreement table (DD Change) is also updated. (The Direct Deposit Agreement page does not require any setup here—it appears automatically when a student enrolls in direct deposit).

See:

- Using Account Services
- "Understanding Student Financials General Setup" (PeopleSoft Campus Solutions 9.0: Student Financials)
- "Understanding Refunding Setup" (PeopleSoft Campus Solutions 9.0: Student Financials)
- "Understanding Refunds" (PeopleSoft Campus Solutions 9.0: Student Financials)
- AP Direct Deposit Setups UPK in My Oracle Support, ID 1282397.1.
Note: UPK for setting up AP Direct Deposit is also available

Defining Self-Service ePayments for Institution Sets

A flexible interface supports the processing of credit card and eCheck transactions. The interface uses a flexible adapter-based model to support the transmission of electronic payment transactions. You can use either the Integration Broker-based interface or the Business Interlinks interface to send electronic payment transactions to third party payment processors.

If you use Integration Broker, it supports the capture of the Security Code. Capturing this code lowers your transaction costs and increases fraud deterrence on card not present transactions.

See:

- "Understanding ePayment Processing" (PeopleSoft Campus Solutions 9.0: Student Financials)
- "Understanding ePayment Transactions" (PeopleSoft Campus Solutions 9.0: Student Financials)
- Electronic Payment Integration Developer's Reference Guide. The guide is posted to My Oracle Support, ID 968171.1
Access the Electronic Payments page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments).

**Image: Electronic Payments page (1 of 2)**

This example illustrates the fields and controls on the Electronic Payments page (1 of 2). You can find definitions for the fields and controls later on this page.
This example illustrates the fields and controls on the Electronic Payments page (2 of 2). You can find definitions for the fields and controls later on this page.

### Make a Payment

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF Credit Card Merchant ID</td>
<td>SS Hosted Payment CC Merchant</td>
</tr>
<tr>
<td>Payment Merchant</td>
<td>Hosted Site for Credit Card</td>
</tr>
<tr>
<td></td>
<td>□ Hosted Payment Provider</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Authorization</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Capture</td>
</tr>
<tr>
<td>SF eCheck Merchant ID</td>
<td>SS Hosted Payment echeck Merc</td>
</tr>
<tr>
<td>Payment Merchant</td>
<td>Hosted Site for eCheck</td>
</tr>
<tr>
<td></td>
<td>□ Hosted Payment Provider</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Debit</td>
</tr>
<tr>
<td>Allocation level</td>
<td>By Business Unit</td>
</tr>
<tr>
<td></td>
<td>□ Allow Excess Payment</td>
</tr>
<tr>
<td></td>
<td>□ Accept Admissions Deposit</td>
</tr>
<tr>
<td>Post Offline Authorization</td>
<td></td>
</tr>
<tr>
<td>Reverse Declined Authorization</td>
<td></td>
</tr>
<tr>
<td>Display Pending Financial Aid</td>
<td>□</td>
</tr>
<tr>
<td>Include Pending Aid - Payments</td>
<td></td>
</tr>
<tr>
<td>Display Pending Payments</td>
<td>□</td>
</tr>
<tr>
<td>Include Pending Payments</td>
<td></td>
</tr>
</tbody>
</table>

### Miscellaneous Fees

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF Credit Card Merchant ID</td>
<td>SS Hosted Payment CC Merchant</td>
</tr>
<tr>
<td>Payment Merchant</td>
<td>Hosted Site for Credit Card</td>
</tr>
<tr>
<td></td>
<td>□ Hosted Payment Provider</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Authorization</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Capture</td>
</tr>
<tr>
<td>SF eCheck Merchant ID</td>
<td>SS Hosted Payment echeck Merc</td>
</tr>
<tr>
<td>Payment Merchant</td>
<td>Hosted Site for eCheck</td>
</tr>
<tr>
<td></td>
<td>□ Hosted Payment Provider</td>
</tr>
<tr>
<td></td>
<td>□ Real-Time Debit</td>
</tr>
</tbody>
</table>
Note: Most of the fields on the Electronic Payments page are specific to each business unit in the institution set, not to the institution set as a whole. If you have multiple business units associated with the institution set, be sure to insert a row and enter the information on the Electronic Payments page for each business unit. Also, if you have more than one business unit associated with your institution set, you must enter a priority ranking for each (see following). The exceptions to this are the service impact and service indicator codes, which are institution set-specific, not business unit-specific.

To control what charges the student can pay towards in self service, you must ensure that the item type contains the correct charge priority list. The charge priority list that you assign to the eCheck item type can differ from the credit card item type. In this way, you can control whether particular charges can be paid by one payment method versus another. Be sure to specify the correct tender category (eCheck or credit card) on the item type so that it is available to select here.

### Accept Self Service Payments

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

### Accept Miscellaneous Purchases

This is a display-only field that shows whether Accept Miscellaneous Purchases has been selected in the General Options setup.

### Electronic Payments

#### Default Address

Select to make the address fields on the Make a Payment - Specify Payment Details page available for input.

#### Default Telephone

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

#### Default Email Address

Select to make the email field on the Make a Payment - Specify Payment Details page available for input.

#### Display Browser Message

Select this check box:

- To display a browser message on the Make a Payment - Confirm Payment page when hosted payment is used.
- To display the Browser Requirements link on the Make a Payment - Confirm Payment page when hosted payment is used.

You define the browser requirements message and detail on the Payment Merchant page.

See "Defining Electronic Payment Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials).

#### Enforce Daily Limit and Daily Limit

Select the Enforce Daily Limit check box to limit the number of self-service payments a student can make per day to the value that you enter in the Daily Limit field. For example, if you set up and institution set with both a credit card merchant ID and an electronic check merchant ID, and enter a daily limit of 4, then
a student can make any combination of eCheck and credit card transactions up to a maximum of four total transactions per day.

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

**Display Privacy Policy**

Select to display the Privacy Policy link on the Make a Payment - Confirm Payment page if a school uses the hosted payment feature and on the Make a Payment - Specify Payment Details page if the school does not use the hosted payment feature.

The privacy policy is optional and user defined.

**Privacy Policy**

Click to access the Institution Set Privacy Policy page and define a privacy policy for your institution.

**Make a Payment**

Your selections here determine what students see in the Make a Payment self-service component. For instance, if you clear the Display Pending Financial Aid check box, then the student's anticipated aid will not be displayed anywhere in the Make a Payment self-service component.

**SF Credit Card Merchant ID and SF eCheck Merchant ID**

Select a credit card SF merchant ID, an eCheck SF merchant ID, or both for an institution set. This determines which payment type is supported for this institution set: credit card only, eCheck only, or both.

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

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

**Payment Merchant**

The check boxes are selected or cleared by default depending on the setup on the SF Merchants page and are not available for edit on this page.
Note: If both credit card and eCheck are available as payment methods for an institution set, both payment methods must be either hosted or non-hosted. For example, if you define an institution set that allows credit card payment with hosted payment and eCheck with non-hosted payment, you receive an error message advising that SF merchants have conflicting payment merchant values.
You can, however, use Business Interlink for one payment method and Integration Broker for another.
Also, across features, you can use both hosted and non-hosted payment—for example, you can use hosted payment for Make a Payment setup and non-hosted for Miscellaneous Fees setup.

See "Understanding ePayment Processing" (PeopleSoft Campus Solutions 9.0: Student Financials).

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

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

**Image: Allocation Level By Business Unit page (1 of 2)**

This example illustrates the fields and controls on the Allocation Level By Business Unit page (1 of 2). You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>What I Owe</th>
<th>Outstanding Charges</th>
<th>Pending Payment Amount</th>
<th>Pending Financial Aid</th>
<th>Remaining Balance</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Comm College</td>
<td>900.00</td>
<td>0.00</td>
<td>0.00</td>
<td>900.00</td>
<td></td>
</tr>
<tr>
<td>PS University</td>
<td>4,448.00</td>
<td>194.00</td>
<td>1,200.00</td>
<td>3,054.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5,348.00</strong></td>
<td><strong>194.00</strong></td>
<td><strong>1,200.00</strong></td>
<td><strong>3,054.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Image: Allocation Level By Business Unit page (2 of 2)**

This example illustrates the fields and controls on the Allocation Level By Business Unit page (2 of 2). You can find definitions for the fields and controls later on this page.

**Allocation Level by Charge**

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

**Image: Allocation Level by Charge page (1 of 2)**

This example illustrates the fields and controls on the Allocation Level by Charge page (1 of 2). You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Due Date</th>
<th>Item Term</th>
<th>Outstanding Charges</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition - Undergraduate - General Biology II</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
<td></td>
</tr>
<tr>
<td>Tuition - Undergraduate - General Chemistry</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
<td></td>
</tr>
<tr>
<td>Tuition - Undergraduate - Pract Act Proc</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
<td></td>
</tr>
<tr>
<td>PSCCS Excess Payment</td>
<td></td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>900.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Due Date</th>
<th>Item Term</th>
<th>Outstanding Charges</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Fines</td>
<td>05/15/2004</td>
<td>2004 Spring</td>
<td>35.00</td>
<td></td>
</tr>
<tr>
<td>Library Fines</td>
<td>multiple..</td>
<td>2004 Spring</td>
<td>22.50</td>
<td></td>
</tr>
<tr>
<td>Tuition</td>
<td>01/01/2005</td>
<td>2005 Spring</td>
<td>1,369.50</td>
<td></td>
</tr>
<tr>
<td>Single Room</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>2,350.00</td>
<td></td>
</tr>
<tr>
<td>Meal Plan:21</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>421.00</td>
<td></td>
</tr>
<tr>
<td>Subscription Fees</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>125.00</td>
<td></td>
</tr>
<tr>
<td>Parking Stickers</td>
<td>02/01/2005</td>
<td>2005 Spring</td>
<td>125.00</td>
<td></td>
</tr>
<tr>
<td>PSLMV Excess Payment</td>
<td></td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>4,448.00</strong></td>
<td></td>
</tr>
</tbody>
</table>
Image: Allocation Level by Charge page (2 of 2)

This example illustrates the fields and controls on the Allocation Level by Charge page (2 of 2). You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Description</th>
<th>Outstanding Charges</th>
<th>Pending Payment Amount</th>
<th>Pending Financial Aid</th>
<th>Remaining Balance</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Comm College</td>
<td>900.00</td>
<td>0.00</td>
<td>0.00</td>
<td>900.00</td>
<td>0.00</td>
</tr>
<tr>
<td>PS University</td>
<td>4,448.00</td>
<td>194.00</td>
<td>1,200.00</td>
<td>3,054.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>5,348.00</td>
<td>194.00</td>
<td>1,200.00</td>
<td>3,954.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Allocation Level by Term

This page displays all charges that the student incurred by term within each business unit on the Make a Payment self-service component. Displaying charges in this manner permits the student to pay all or a portion of a term's charges—these charges are aggregated by business unit whereby the student cannot pay each individual charge. The Student Financials posting process invokes the appropriate charge priority and payment overall priority rules to the self-service payments.
**Note:** For the Allocation Level by Term feature to work, you will need set Term, Payment Term First for Sort 1 of the Charge Sort for Payment Overall Priority attribute for applicable ePayment item types.

**Image: Allocation Level by Term page (1 of 2)**

This example illustrates the fields and controls on the Allocation Level by Term page (1 of 2). You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Description</th>
<th>Term</th>
<th>Outstanding Charges</th>
<th>Pending Financial Aid</th>
<th>Remaining Balance</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Comm College</td>
<td>2004 Fall</td>
<td>900.00</td>
<td>0.00</td>
<td>900.00</td>
<td></td>
</tr>
<tr>
<td>PS University</td>
<td>2004 Spring</td>
<td>57.50</td>
<td>0.00</td>
<td>57.50</td>
<td></td>
</tr>
<tr>
<td>PS University</td>
<td>2005 Spring</td>
<td>4,390.50</td>
<td>1,200.00</td>
<td>3,190.50</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5,348.00</strong></td>
<td><strong>1,200.00</strong></td>
<td><strong>4,148.00</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This example illustrates the fields and controls on the Allocation Level by Term page (2 of 2). You can find definitions for the fields and controls later on this page.

### My Charges

<table>
<thead>
<tr>
<th>PS Comm College</th>
<th>Due Date</th>
<th>Item Term</th>
<th>Outstanding Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition - Undergraduate - General Biology II</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
</tr>
<tr>
<td>Tuition - Undergraduate - General Chemistry</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
</tr>
<tr>
<td>Tuition - Undergraduate - Fract Acct Proc</td>
<td>08/28/2004</td>
<td>2004 Fall</td>
<td>300.00</td>
</tr>
<tr>
<td><strong>Total for 2004 Fall</strong></td>
<td></td>
<td></td>
<td><strong>900.00</strong></td>
</tr>
</tbody>
</table>

**Currency used is US Dollar.**

<table>
<thead>
<tr>
<th>PS University</th>
<th>Due Date</th>
<th>Item Term</th>
<th>Outstanding Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Fines</td>
<td>05/15/2004</td>
<td>2004 Spring</td>
<td>25.00</td>
</tr>
<tr>
<td>Library Fines</td>
<td>multiple...</td>
<td>2004 Spring</td>
<td>22.50</td>
</tr>
<tr>
<td><strong>Total for 2004 Spring</strong></td>
<td></td>
<td></td>
<td><strong>57.50</strong></td>
</tr>
<tr>
<td>Tuition</td>
<td>01/01/2005</td>
<td>2005 Spring</td>
<td>1,369.50</td>
</tr>
<tr>
<td>Single Room</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>2,350.00</td>
</tr>
<tr>
<td>Meal Plan-21</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>421.00</td>
</tr>
<tr>
<td>Subscription Fees</td>
<td>01/15/2005</td>
<td>2005 Spring</td>
<td>125.00</td>
</tr>
<tr>
<td>Parking Stickers</td>
<td>02/01/2005</td>
<td>2005 Spring</td>
<td>125.00</td>
</tr>
<tr>
<td><strong>Total for 2005 Spring</strong></td>
<td></td>
<td></td>
<td><strong>4,390.50</strong></td>
</tr>
</tbody>
</table>

**Allow Excess Payment**

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

**Accept Admissions Deposit**

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

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

**Post Offline Authorization**

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

**Post Unprocessed Authorization**

Select to post credit card transactions that fail while performing real-time authorization due to a connection problem. If you cleared this check box, the system posts only transactions with fully processed authorizations.
Note: Consider the implications if transactions posted in real
time fail authorization when processed at a later point in time (such as payment reversals and discharge of service indicators).

Reverse Declined Authorization

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

Your next selections determine what students see in the Make a Payment self-service component. For
instance, if you clear the Display Pending Financial Aid check box, then the student's anticipated aid will
not be displayed anywhere in the Make a Payment self-service component.

Display Pending Financial Aid

Select to display anticipated aid as a line item on the Make a
Payment - Specify Payment Amount page in the What I Owe
grid. With this check box selected, anticipated aid appears on
the page as a line item only and does not reduce the remaining
balance amount. Students are informed of any anticipated aid,
but their total charges are not reduced by the anticipated aid.

If this check box is cleared, then the student's anticipated aid
does not appear anywhere in the Make a Payment self-service
component.

Include Pending Aid – Payments

Select to use pending financial aid to reduce the remaining
balance amounts on the Make a Payment - Specify Payment
Amount page. This check box must be used in conjunction with
the Display Pending Financial Aid check box for the remaining
balance amount to be reduced by anticipated aid.

If this check box is selected, the student's total charges are
reduced and the student is informed of any anticipated aid.

If Display Pending Financial Aid and this check box are both
cleared, then the student's anticipated aid does not appear
anywhere in the Make a Payment self-service component.

Display Pending Payments

Select to display the student's pending payments on the Make
a Payment - Payments page and the Make a Payment - Specify
Payment Amount page.

If this check box is cleared, then the student's pending payments
do not appear anywhere in the Make a Payment self-service
component.

Include Pending Payments

If this check box is selected, then the student's balance is
reduced by the payment amount. This check box must be used
in conjunction with the Display Pending Payments check
box for the remaining balance amount to be reduced by any
payments made.
If Display Pending Payments and this check box are both cleared, then the student's pending payments do not appear anywhere in the Make a Payment self-service component.

### Miscellaneous Fees

Use these fields if your institution wants to set up separate merchant IDs for miscellaneous purchases as opposed to regular tuition payments.

**SF Credit Card Merchant ID and SF eCheck Merchant ID**

Select a credit card SF merchant ID, an eCheck SF merchant ID, or both for miscellaneous fees. This determines which payment type is supported for this institution set: credit card only, eCheck only, or both. If you select a value in both the SF Credit Card Merchant ID and SF eCheck Merchant ID fields, the Select Payment Method page prompts students to select one of two payment types from the drop-down list box—Pay by Credit Card or Pay by Electronic Check—before they are permitted to enter self-service payment information. If you select a value in only one field, the system takes students directly to the Make a Payment - Specify Payment Details page because only one valid tender option is available for self-service payment.

For miscellaneous purchases, the setup on the Purchase Items setup component (SSF_PUR_ITEM_TABLE) determines the items that will be presented for purchase. Because these are optional purchases, they do not exist until the student (or user) elects to purchase these items. Because these are paid for at the time of selection, charge priority rules do not affect miscellaneous purchases.

**Payment Merchant**

The check boxes are selected or cleared by default depending on the setup on the SF Merchants page and are not available for edit on this page.

---

**Note:** If both credit card and echeck are available as payment methods for an institution set, both payment methods must be either hosted or non-hosted. For example, if you define an institution set that allows credit card payment with hosted payment and eCheck with non-hosted payment, you receive an error message advising that SF merchants have conflicting payment merchant values.

You can, however, use Business Interlink for one payment method and Integration Broker for another. (For credit cards, Security Code is supported only by Integration Broker). Also, across features, you can use both hosted and non-hosted payment—for example, you can use hosted payment for Make a Payment setup and non-hosted for Miscellaneous Fees setup.

See "Understanding ePayment Processing" (PeopleSoft Campus Solutions 9.0: Student Financials).
Defining Self-Service Business Units for Institution Sets

Access the Business Units page ((Set Up SACR,  Common Definitions,  Self Service,  Student Financials, SF Institution Set,  Business Units).

Image: Business Units page (1 of 2)

This example illustrates the fields and controls on the Business Units page (1 of 2). You can find definitions for the fields and controls later on this page.
This example illustrates the fields and controls on the Business Units page (2 of 2). You can find definitions for the fields and controls later on this page.

**Note:** Most of the fields on the SF Institution Set - Business Units page are specific to each business unit in the institution set, not to the institution set as a whole. If you have multiple business units associated with the institution set, be sure to insert a row and enter the information on the SF Institution Set - Business Units page for each business unit. Also, if you have more than one business unit associated with your institution set, you must enter a priority ranking for each (see below). The exceptions to this are the service impact and service indicator codes, which are institution-set-specific, not business-unit-specific. To control what charges the student can pay towards in self service, you must ensure that the item type contains the correct charge priority list. The charge priority list that you assign to the eCheck item type can differ from the credit card item type. In this way, you can control whether particular charges can be paid by one payment method versus another. Be sure to specify the correct tender category (eCheck or credit card) on the item type so that it is available to select here.

**Business Unit**

Enter the business unit that you want to include in this institution set.
## Contact Information

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

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

**Email ID**
Enter the email address of the contact person.

**Telephone**
Enter the telephone number of the contact person.

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

## Manage Banks Service Impact

Use the Disable Manage My Banks service impact to remove student access to the Manage My Bank Accounts pages in Self Service. If a student has this service impact, the student cannot set up new bank accounts or edit existing bank account details. This service impact does not prevent direct deposit refunds from being distributed to existing bank accounts.

After you verify that the student cannot access the Manage My Bank Accounts component in Self Service, revoke the bank agreement if one exists.

## Payment Service Impact

**Disable Internet Payment**
Select the negative service impact code that the system uses to disable a customer's ability to pay on the internet using a credit card. If the student has this impact on his or her account, the student cannot access the Make a Payment page.

**Override Daily Limit**
Select the positive service impact code that the system uses to enable customers to bypass the daily limit for credit card payments. If a student has this impact on his or her account, the student cannot make credit card payments in excess of the daily limit.

**Accept Self-Service Payments**
This is a display-only field that shows whether Accept Self Service Payments has been selected in the General Options setup. This means that web credit-card payments are authorized for this business unit.

## Make a Payment

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

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

**eCheck Item Type**
Enter the item type that the system uses for self-service eCheck transactions entered for this institution set.
Note: The payment item type that you select must specify electronic check as a tender type.

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.0: Student Financials).

Deposit Item Type

If you accept web credit card payments for admission deposits, select the item type that is defined for admission deposits.

Primary Business Unit

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

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

Convenience Fee Account Type

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

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

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.0: Student Financials).

Convenience Fee Item Type

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

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

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.0: Student Financials).

Excess Payment Account

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

Excess Payment Description

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

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

Miscellaneous Fees

This setup allows different payment item types and convenience fee item types to be used as opposed to the regular Make a Payment item types

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

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

eCheck Item Type
Enter the item type that the system uses for self-service eCheck transactions entered for this institution set to pay for miscellaneous purchases.

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

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.0: Student Financials).

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

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

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.0: Student Financials).

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

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

This section discusses how to define business unit labels.

Page Used to Set Up Self-Service Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF Self Service Options</td>
<td>SS_SF_OPTIONS</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Financials, SF Self Service Options</td>
<td>Define business unit labels for self-service payment pages. The values that you enter here are used in the View By drop-down list boxes and in grids on self-service pages.</td>
</tr>
</tbody>
</table>

Defining Business Unit Labels

Access the SF Self Service Options page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Self Service Options).

Image: SF Self Service Options page

This example illustrates the fields and controls on the SF Self Service Options page. You can find definitions for the fields and controls later on this page.

SF Self-Service Options

Business Unit: PSUNIV PeopleSoft University Bursar

Alternative Text

Business Unit Label: PS University

Short Business Unit Label: PSUNIV

Business Unit Label

Enter the label that appears on all self-service pages that reference the business unit: table headings, filters, column headings, and so on.

Short Business Unit Label

SSF_FINANCIALS web service uses the value in this field. The value is captured through the BUSINESS_UNIT_LOVDescrShort element of the XML.

See "Using the SSF_EPAYMENT_TRANS Web Service" (PeopleSoft Campus Solutions 9.0: Student Financials)
Setting Up Miscellaneous Fees

Miscellaneous fees are charges that are separate from tuition that can be selected and paid for in one transaction. Students can select and purchase items or services, for example, parking or a health plan, in Self Service. The user does not need to be a student (especially for non-term-based fees).

This section discusses how to:

- Set up a purchase category.
- Set up purchase items.
- Enable self-service miscellaneous purchases.

Pages Used to Set Up Miscellaneous Fees

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Category</td>
<td>SSF_PUR_CATEGORY</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Category</td>
<td>Set up a purchase category.</td>
</tr>
<tr>
<td>Purchase Items</td>
<td>SSF_PUR_ITEM_TBL</td>
<td>Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Items</td>
<td>Set up fee structure for purchase of miscellaneous items.</td>
</tr>
</tbody>
</table>

Setting Up a Purchase Category

Access the Purchase Category page (Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Category).

Image: Purchase Category page

This example illustrates the fields and controls on the Purchase Category page. You can find definitions for the fields and controls later on this page.

Purchase Category

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>PSUNV</th>
<th>Purchase Category:</th>
<th>HLTHINSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Health Care Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long Description:</td>
<td>Health Care Insurance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Setting Up Purchase Items

Access the Purchase Items page (Set Up SACR, Common Definitions, Self Service, Student Financials, Purchase Items).

Image: Purchase Items page

This example illustrates the fields and controls on the Purchase Items page. You can find definitions for the fields and controls later on this page.

**Purchase Items**

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>PSUNV</th>
<th>Purchase Item Code:</th>
<th>HPLNA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Health Plan A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long Description:</td>
<td>How The Plan Works: You may visit any doctor or hospital. You receive a higher level of benefits when you use PPO Choice Plus network. You are responsible for any non-named doctors and facilities not in the network.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setup for:</td>
<td>Students Who Match Attributes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Fee Setup**

- **Effective Date:** 01/01/2006
- **Expiration Date:** 12/31/2006
- **Purchase Category:** HLTHINSN: Health Care Insurance
- **Account Type:** OTH: Other Fees
- **Item Type:** 2000000000003: Health Fees
- **Term:** 0570: 2006 Fall
- **Amount:** 228.00 USD

**Student Attributes**

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Prog:</td>
<td>GRFIN: Finance</td>
</tr>
<tr>
<td>Campus:</td>
<td>WALCR: Walnut Creek Campus</td>
</tr>
<tr>
<td>Academic Load:</td>
<td>Enrolled Full-Time</td>
</tr>
<tr>
<td>Tuition Group:</td>
<td>GRAD: Graduate Student</td>
</tr>
</tbody>
</table>

**Description**

Enter a description of the purchase item. This will appear in the self-service component for available items.

**Long Description**

Enter a more detailed description of the purchase item. In the Purchase Miscellaneous Items self-service component (SSF_SS_MISC_PUR), the long description appears when you click the link of the available item.

**Setup for**

Select from the following list of values to determine what population can view miscellaneous items for purchase on self service.

- **All Term Activated Students:** The term is available.
- **All Users:** The fee is set up for all users, regardless of student status. Student attributes and student groups are not available.
- **Student Groups:** Any ID placed in a group will see this charge on self service.
The item is set up only for members of a student group, for example, honors students, veterans, and so on.

Items that are set up with this attribute appear only as available items for purchase for student IDs that have been added to the student group.

- Students Who Match Attributes: The student must have a record in STDNT_CAR_TERM. The Term field in level one is available. The Student Groups field is not available for entry. Fees that are set up with this attribute will appear only to students matching the attributes in the Student Attributes area.

### Fee Setup

**Effective Date**
- The start date. Prior to this date, the item is not eligible for selection in self service.

**Status**
- *Active* or *Inactive*.

**Expiration Date**
- The end date. The item is not available for selection using self service after this date.

**Term**
- Appears only for Students Who Match Attributes and All Term Activated Student selections.

This limits the item to a specific term and is used in conjunction with the effective date and expiration date that do not fall into the start and end dates of the term. For fees that have overlapping effective and expiration date ranges, for example, supplemental health insurance, you can add multiple terms to cover the item for purchase.

**Purchase Category**
- Select a purchase category.

**Account Type**
- Use to classify the charge item type.

**Item Type**
- Define an item type for the charge.

**Amount**
- Enter the amount to be charged for the item.

### Student Attributes

The Student Attributes group box does not appear if the institution selects *All Term Activated Students* or *All Users* in the Setup for field on this page.

If *Student Group* is selected in the Setup for field on this page, the Student Group field appears. Select a student group.

If *Students Who Match Attributes* is selected in the Setup for field on this page, select a value for each of the following fields:
• Academic Career
• Primary Prog (primary program)
• Campus
• Academic Load
• Tuition Group

**Enabling Self-Service Miscellaneous Purchases**

To enable self-service miscellaneous purchases, select the Accept Miscellaneous Purchases check box on the Institution Set page. This check box controls whether the Accept Miscellaneous Purchases option appears in the other financial drop-down list box in Student Center and whether the link appears at the bottom of the Account Inquiry page.

See [Setting Up Institution Sets](#).
Chapter 7

Setting Up Financial Aid Self-Service

Understanding Campus Self Service for Financial Aid

Financial Aid self service enables students to view financial aid information and take necessary action. Students can report awards they earned from sources external to the financial aid office. They can accept, decline, and reduce award amounts and then print the Financial Award Notification (FAN). After accepting an award, a student can select a lender to secure the loan and then fulfill loan counseling requirements. Students can also request a change to their financial aid, cancel their aid, or request a meeting through the Request Counselor Action feature.

Students can view a summary of and detailed information about their financial aid for a specific aid year, which includes:

- Estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.
- Type of award and the offered and accepted amount for each term within the aid year.
- Loan application status, loan amount, loan fee, net amount, scheduled disbursement data, and lender information.

Setting Up Self-Service Inquiry Options

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

This section discusses how to define self-service options.

Page Used to Set Up Self-Service Inquiry Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiry Options</td>
<td>SS_FA_INSTALL</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options</td>
<td>Define self-service options. Set up information that you want available for students to view.</td>
</tr>
</tbody>
</table>
Defining Self-Service Options


Image: Inquiry Options page

This example illustrates the fields and controls on the Inquiry Options page. You can find definitions for the fields and controls later on this page.

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

Display Data

Allow Access

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

Note: Use the Inquiry Access check box and the Award Access field on the Financial Aid Status page to set access at the individual student level. If you clear the Inquiry Access check box, the student cannot access the inquiry pages. However, if you select the Inquiry Access check box and also select the Allow Access check box on the Self Service Options page, the student can access the inquiry pages. Similarly, if you set the Award Access field to Allowed and select the Allow Access check box on the Inquiry Options page, the student can access the self-service award pages. The administrative user can set these fields in batch.
<table>
<thead>
<tr>
<th>Award Detail</th>
<th>Select to display the Financial Aid Award Summary page. If you clear the check box, the student sees the Financial Aid - Self Service Links page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining Need</td>
<td>Select to display the student's remaining need on the Financial Aid - Financial Aid Eligibility page.</td>
</tr>
<tr>
<td>Canceled Awards</td>
<td>If you select this check box and the student has a canceled award, the system activates the View Canceled Awards link on the Financial Aid - Award Summary page.</td>
</tr>
<tr>
<td>Declined Awards</td>
<td>If you select this check box and the student has a declined award, the system activates the View Declined Awards link on the Financial Aid - Award Summary page.</td>
</tr>
<tr>
<td>Award Notification</td>
<td>Select to display the FE Award Notification PDF link on the student's Financial Aid - Award Summary page and Financial Aid - Award Package page.</td>
</tr>
<tr>
<td>SAP(Satisfactory Academic Progress)</td>
<td>Select to display a Satisfactory Academic Progress link on the Financial Aid – Award Summary pages.</td>
</tr>
</tbody>
</table>

**View Data By**

Select from:

- **Aid Year:** Displays the entire aid year across award periods.
- **Award Period:** Displays aid year information by the award period for academic and nonstandard periods.

**Summary Link**

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

Select from:

- **COA Detail Only:** Displays estimated financial aid budget detail.
- **Do Not Show Link:** Does not display link.
- **Summary Page:** Displays the Financial Aid - Financial Aid Eligibility page. Students can view estimated financial aid budget, expected family contribution, estimated need, total aid, remaining need, and user-defined text.
- **User-defined Page:** Displays user-defined text.

**Need Methodology**

Select from:

- **Federal:** Displays estimated financial aid budget and expected family contribution (EFC) values based on federal methodology.
- **Institutional:** Displays estimated financial aid budget and EFC values based on institutional methodology.
### Alternate Text

<table>
<thead>
<tr>
<th><strong>Summary Link Label</strong></th>
<th>Enter a name for this link. The text that you enter here is the name of the link that appears on the Financial Aid - Award Summary page and the title of the Financial Aid - Aid Year Summary page.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Year Award Period</strong></td>
<td>Enter text such as <em>Academic Year 2005</em>. The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Award Summary and Financial Aid - Expected Family Contribution pages.</td>
</tr>
<tr>
<td><strong>Non-Standard Award Period</strong></td>
<td>Enter text such as <em>Summer</em>: The system displays this text when referring to this specific award period on self-service pages such as the Financial Aid - Expected Family Contribution page.</td>
</tr>
<tr>
<td><strong>View Award Notification</strong></td>
<td>Enter a name for the link on the Financial Aid - Award Summary and Financial Aid - Award Package pages. This link enables students to view and print their award letter and notification.</td>
</tr>
<tr>
<td><strong>SAP Link Label(Satisfactory Academic Progress)</strong></td>
<td>Enter text for the Satisfactory Academic Progress link on the Financial Aid – Student Awards pages. If no text is entered here, the text that is displayed is <em>Satisfactory Academic Progress</em>.</td>
</tr>
</tbody>
</table>

### Sort Order

<table>
<thead>
<tr>
<th><strong>Award Period</strong></th>
<th><strong>Note:</strong> The system displays this field only if you set the View Data By field to <em>Award Period</em>.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select from:</strong></td>
<td><strong>Academic Year First:</strong> Displays academic year data first and then nonstandard period data.</td>
</tr>
<tr>
<td></td>
<td><strong>Earliest Period First:</strong> Displays the award period into which the student's earliest term falls. For example, if a student has awards for both Summer 2004 (nonstandard) and Fall 2004 (academic year), and these terms are part of the same aid year, then the nonstandard period is displayed first.</td>
</tr>
<tr>
<td></td>
<td><strong>Latest Period First:</strong> Displays the award period into which the student's most recent term falls. For example, if a student has awards for both Summer 2004 (nonstandard period) and Fall 2004 (academic year), and these terms are part of the same aid year, then the academic year period is displayed first.</td>
</tr>
<tr>
<td></td>
<td><strong>Non-standard Period First:</strong> Displays the nonstandard period first.</td>
</tr>
</tbody>
</table>
Note: If the student has awards in only one award period, the system displays whichever award period contains awards. If the student has awards in both periods, the system uses the Award Period sorting option to determine which period to display first.

Term
Select from:

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

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

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

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

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

Copy Self Service Options
Click to copy financial aid self-service options from this institution and aid year to another.

Setting Up Reporting of External Awards

This section discusses how to:

- Display external award reporting on self-service pages.
- Enable student access to reporting of external awards.

Pages Used to Set Up Reporting of External Awards

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awarding Options</td>
<td>SS_FA_INSTALL2</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options</td>
<td>Enable student access from the Award Inquiry page or the Accept/Decline pages. Optionally add instructional text for reporting or viewing.</td>
</tr>
<tr>
<td>Packaging Status Summary</td>
<td>STDNT_AID_PACKAGE</td>
<td>Financial Aid, View Packaging Status Summary, Packaging Status Summary</td>
<td>Set access to External Award reporting on student self-service pages.</td>
</tr>
</tbody>
</table>
Displaying External Award Reporting on Self-Service Pages

Access the Awarding Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options).

**Image: Awarding Options for External Award Reporting page**

This example illustrates the fields and controls on the Awarding Options for External Award Reporting page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Access Criteria</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FA Application Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Processing Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FED Verification Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INST Verification Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfactory Academic Progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award Notification Complete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Processing Option**
- Batch
- Real time

**Consumer Information URL**


**Entrance Interview URL**

http://www.salliemae.com/

**External Award Reporting**

<table>
<thead>
<tr>
<th>Access from Award Inquiry</th>
<th>Alternate Text for Reporting</th>
<th>Alternate Text for List View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access from Accept/Decline</td>
<td>Report Other Financial Aid</td>
<td>Aid from Other Sources</td>
</tr>
</tbody>
</table>

**External Award Reporting**

- **Access from Award Inquiry**
  Select to display a link to the Report Aid from Other Source component on the students' Award Inquiry Self Service pages.

- **Access from Accept/Decline**
  Select to display a link to the Report Aid from Other Source component on the students' Accept Award and Decline Award Self Service pages.

- **Alternate Text for Reporting**
  Enter text to use as the link from the Award Inquiry and Accept/Decline page.

- **Alternate Text for List View**
  Enter text to use as the page title for a student to report aid from an external source.
Enabling Student Access to Reporting of External Awards

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).

Image: Packaging Status Summary page

This example illustrates the fields and controls on the Packaging Status Summary page. You can find definitions for the fields and controls later on this page.

For each student, set the access to External Award reporting.

Self Service

Award Access
Select from Allowed, Denied, and Use Filter.

Inquiry Access
Select to enable student access to award information.

External Award Access
Select to enable student access to the External Award reporting component.

Setting Up Self-Service Awarding Options

To set up self-service awarding options, use the Self Service Options component (SS_FA_INSTALL). This section discusses how to set up self-service awarding.
Page Used to Set Up Self-Service Awarding Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awarding Options</td>
<td>SS_FA_INSTALL2</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Awarding Options</td>
<td>Define filter options for self-service awarding access criteria. Set up processing options and Consumer and Entrance Interview URLs. Also, define the authentication method and number of required references for the Perkins eMPN.</td>
</tr>
</tbody>
</table>

Setting Up Self-Service Awarding Options

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


Image: Awarding Options page

This example illustrates the fields and controls on the Awarding Options page. You can find definitions for the fields and controls later on this page.

Institution: PSUNY  PeopleSoft University

Aid Year: Financial Aid Year 2012 - 2013

Self Service Award Processing

Access Criteria

- **FA Application Status**: Operator: equals to, Value: Active
- **Processing Status**: Operator: equals to, Value: Package
- **FED Verification Process**: Operator: Not equal to, Value: Not Meet
- **INST Verification Process**: Operator: Not equal to, Value: Not Meet
- **Satisfactory Academic Progress**: Operator: Not equal to, Value: Not Meet
- **Award Notification Complete**: Operator: Not equal to, Value: Not Meet

Processing Option

- **Batch**
- **Real time**

Consumer Information URL: [http://www.salliemae.com](http://www.salliemae.com)

Entrance Interview URL: [http://www.salliemae.com](http://www.salliemae.com)

External Award Reporting

- **Access from Award Inquiry**: Alternate Text for Reporting: Report Other Financial Aid
- **Access from Accept/Decline**: Alternate Text for List View: Aid from Other Sources
## Self Service Award Processing

One way to control when a student gains access to the self-service awarding page is through the use of filtering. If you do not select the check box, then the system does not consider it as part of the access criteria.

### Access Criteria

When setting a value for an access criteria, select an operator of either equal to or not equal.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FA Application Status (Financial Aid application status)</strong></td>
<td>Select to allow self-service awarding access based on the student having an active financial aid application.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Select Active, Canceled, or Restricted.</td>
</tr>
<tr>
<td><strong>Processing Status</strong></td>
<td>Select to allow self-service awarding access based on the student's processing status.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Select Applied, Completed, No App Rcd, Package, or Review.</td>
</tr>
<tr>
<td><strong>FED Verification Process (federal verification process)</strong></td>
<td>Select to allow self-service awarding access based on the student's federal verification status.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Select Complete, Not Req'd, Pending, or Required.</td>
</tr>
<tr>
<td><strong>INST Verification Process</strong></td>
<td>Select to allow self-service awarding access based on the student's institutional verification status.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Select Complete or Incomplete.</td>
</tr>
<tr>
<td><strong>Satisfactory Academic Progress</strong></td>
<td>Select to allow self-service awarding access based on the student having met your institution's criteria for satisfactory academic progress.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>Select Meets SAP, Not Meet, Probation, or Undeterminate.</td>
</tr>
<tr>
<td><strong>Award Notification Complete</strong></td>
<td>Select to allow self-service awarding access based on whether a financial-aid award notification letter has been generated for the student.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Select an option:</td>
</tr>
<tr>
<td></td>
<td><em>Appeal:</em> FA Appeals</td>
</tr>
<tr>
<td></td>
<td><em>Award:</em> Financial Aid Award Notification</td>
</tr>
<tr>
<td></td>
<td><em>SAT:</em> Satisfactory Academic Progress Letters</td>
</tr>
<tr>
<td></td>
<td><em>SCHLRS:</em> Scholarship Communications</td>
</tr>
<tr>
<td></td>
<td><em>VERF:</em> Verification Processing</td>
</tr>
<tr>
<td><strong>Context</strong></td>
<td>Select a type of communication. The system uses the same criteria when generating the FAN letter.</td>
</tr>
</tbody>
</table>
Letter

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

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

Processing Option

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

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

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

Consumer Information URL

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

**Entrance Interview URL**

Enter your institution's entrance and exit interview site to display a link in self-service awarding. If you leave this blank, the system does not display a link. If you use Self Service Loan Counseling and enter entrance and exit interview URLs on the Loan Counseling page, leave this field blank, or both URLs appear.

**External Award Reporting**

- **Access from Award Inquiry**
  Select to display a link on the students' Award Inquiry Self Service pages.

- **Access from Accept/Decline**
  Select to display a link on the students' Accept Award and Decline Award Self Service pages.

- **Alternate Text for Reporting**
  Enter instructions to the student that varies from the default text.

- **Alternate Text for List View**
  Enter instructions to the student that varies from the default text.

### Setting Up FE FAN View and Print Options

Students can view and print their Forms Engine (FE) financial aid notification letter (FANLTR) in self-service if you display the links on their Award Summary and Award Package pages.

### Prerequisites

Before a student can print an FE FAN letter from Self Service, either GhostView or Adobe Distiller must be installed to format the PDF.

### Pages Used to Set Up FE FAN View and Print Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FE Award Notification Defaults</td>
<td>FANLTR_DEFAULTS</td>
<td>Financial Aid, Awards, Notification Letter, Award Notification Defaults</td>
<td>Ensure that the Display NID check box is not selected to avoid printing U.S. students' Social Security Numbers on their FAN letters. Select the Print Cancels and Print Declines check boxes to show links to canceled or declined awards.</td>
</tr>
</tbody>
</table>
Setting Up Lender Selection

To set up lender selection for the student, activate the display on the Loan Options page and ensure that the preferred lenders are set up. You might have set up lenders while processing FFELP loans.

This section discusses how to:

- Display lender selection.
- Define self-service lenders.

Related Links

"Setting Up Loan Origination for CRC" (PeopleSoft Campus Solutions 9.0: Financial Aid)
"Setting Up Loan Participants" (PeopleSoft Campus Solutions 9.0: Financial Aid)

Pages Used to Set Up Lender Selection

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Self Service Lenders</td>
<td>SFA_LNDR_SELECT_SU</td>
<td>Set Up SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders</td>
<td>Select the preferred lender for each loan type.</td>
</tr>
</tbody>
</table>
### Displaying Lender Selection

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).

#### Image: Loan Options for Lender Selection page

This example illustrates the fields and controls on the Loan Options for Lender Selection page. You can find definitions for the fields and controls later on this page.

#### FFELP Lender Section Setup

**Display Lender Selection**

Select $x$ to display the lender selection on the students' self-service pages.

**Lender Sort Option**

If you selected the Display Lender Selection check box, select *Random* or *Sequence Number* to control how the lender list is displayed in self-service:

- *Random* (default) results in the lenders being displayed in a different random order each time the student accesses the Lender Selection page.
Sequence Number results in lenders being displayed based on the sequence number that was assigned to each lender on the Identify Self-Service Lenders page.

**Entrance Exit Counseling Setup**

**Display Entrance Interview URL**  
To activate an entrance interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

**Display Exit Interview URL**  
To activate an exit interview link for loan counseling, select this check box. The URL is defined on the Loan Counseling page.

**General Loan Information**

Enter a URL to enable students to access more detailed loan information. This URL can link students to an already existing intranet loan page or to an external loan servicer for which you have established a relationship. This link is available only if the loan has been originated in the system. The URL appears on the Financial Aid - Loan Application Information page.

**Perkins Master Promissory Note**

Use these options to support your eMPN processes and dynamically adjust the Self-Service page components within the eMPN process.

**Authentication Method**  
Indicate the verification method for authenticating a student for eMPN. If you select Birthdate, Personal Identification Number, or National ID Number, students must enter the required information to authenticate and continue with the eMPN process. If you select No Authentication, the system does not prompt for authentication information.

You define a student's birth date, national ID number, and PIN in Campus Community. The system always uses the student's primary national ID number for authentication purposes.

**Additional References**  
Indicate the number of required references (0, 1, 2, or 3) in addition to the required two references collected to complete the eMPN.
Defining Self-Service Lenders

Access the Identify Self Service Lenders page (Set Up SACR, Product Related, Financial Aid, Loans, Identify Self Service Lenders).

**Image: Identify Self Service Lenders page**

This example illustrates the fields and controls on the Identify Self Service Lenders page. You can find definitions for the fields and controls later on this page.

**Identify Self Service Lenders**

![Identify Self Service Lenders page](image)

Use this page to set up self-service lender lists and associated guarantors for each loan type. This information appears for the student in Self Service only if the Display Lender Selection option is selected on the Loan Options page and the student has been awarded a loan associated with any loan type set up on this page.

The Guarantor values defined on this page are used in combination with the lender selected by the student to derive the correct loan destination during the Loan Origination process.

You can set up a default guarantor in the Loan Type area, define specific guarantors for each lender in the Loan Information area, or both on this page. When the student selects a lender in Self Service, the system first attempts to use the guarantor value associated with the specific lender in the Loan Information area, and if no value exists, it looks for a guarantor value at the Loan Type level. If a guarantor value is not found, a guarantor is not attached to the student's lender selection record, which can result in no loan destination being found during the Loan Origination process.

To ensure that the Loan Origination program determines the correct CommonLine version and loan destination for each loan, you must set up CommonLine version 4 (CL4) loan destinations, Common Record CommonLine (CRC) loan destinations, or both that match the lender and guarantor combinations on this page.

**Note:** The Lender OPEID value is the only one seen by the student in Self Service. The Lender Branch ID, Guarantor OPEID, and Guarantor Branch ID values are transparent to the student when selecting a lender.

**Loan Type**

**Loan Type**

Select from the drop-down list box to identify each loan type for which you allow a student to select a lender through Self Service.
### Guarantor OPEID

Enter a guarantor OPEID as a default value for a specific loan type. The default guarantor value entered here is attached to the student's lender selection record only if the Guarantor OPEID field within the Loan Information area is left blank for the lender selected.

The values in the lookup list are from the CRC participant setup.

<table>
<thead>
<tr>
<th>Guarantor OPEID (guarantor office of postsecondary education identifier)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a guarantor OPEID as a default value for a specific loan type.</td>
</tr>
<tr>
<td>The default guarantor value entered here is attached to the</td>
</tr>
<tr>
<td>student's lender selection record only if the Guarantor OPEID field</td>
</tr>
<tr>
<td>within the Loan Information area is left blank for the lender selected.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Branch ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required if the Guarantor OPEID field is populated. Enter a</td>
</tr>
<tr>
<td>branch ID that is associated with the guarantor.</td>
</tr>
</tbody>
</table>

### Loan Information

<table>
<thead>
<tr>
<th>Lender OPEID (lender office of postsecondary education identifier)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the lender OPEID available to the student for this loan</td>
</tr>
<tr>
<td>type. The values in the lookup list are from the CRC participant</td>
</tr>
<tr>
<td>setup.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Branch ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required if the Lender OPEID field is populated. Enter the</td>
</tr>
<tr>
<td>branch ID that is associated with the lender.</td>
</tr>
</tbody>
</table>

| Guarantor OPEID (guarantor office of postsecondary education      |
| identifier) (Optional) Enter a guarantor at this level to indicate |
| a specific guarantor for the lender. If the student selects the   |
| associated lender, the guarantor entered here is attached to the  |
| student's lender selection record. The values in the lookup list  |
| are from the CRC participant setup.                               |

If you do not enter a guarantor here, the system checks for a      |
default guarantor in the Loan Type area.                          |

<table>
<thead>
<tr>
<th>Branch ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required if the Guarantor OPEID field is populated. Enter a</td>
</tr>
<tr>
<td>branch ID that is associated with the guarantor.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Sequence Number is selected in the Lender Sort Option field</td>
</tr>
<tr>
<td>on the Loan Options page, use this field to display the lenders to</td>
</tr>
<tr>
<td>the student.</td>
</tr>
</tbody>
</table>

If no sequence numbers are identified, the system orders the list  |
by lender OPEID.                                                  |

---

### Setting Up Loan Counseling

Loan counseling can be handled by the administrator or in Self Service by the student. When the student completes loan counseling for an award defined as requiring an entrance interview, the loan can be disbursed.

This section discusses how to control the display of loan counseling links in student Self-Service.
Page Used to Set Up Loan Counseling

<table>
<thead>
<tr>
<th><strong>Page Name</strong></th>
<th><strong>Definition Name</strong></th>
<th><strong>Navigation</strong></th>
<th><strong>Usage</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Options</td>
<td>SS_FA_INSTALL3</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options</td>
<td>Control the display of entrance interview links and exit interview links on the students' self-service pages.</td>
</tr>
</tbody>
</table>

Controlling the Display of Loan Counseling Links

Access the Loan Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Loan Options).

**Image: Loan Options for Loan Counseling page**

This example illustrates the fields and controls on the Loan Options for Loan Counseling page. You can find definitions for the fields and controls later on this page.

To activate the display of loan counseling links, select the Display Entrance Interview URL and Display Exit Interview URL check boxes. If you do not want to display a link at certain times of the year, clear the check box.

For more information regarding Loan Counseling Setup:

See "Understanding Loan Counseling" (PeopleSoft Campus Solutions 9.0: Financial Aid).

See "Understanding Disbursement Rules" (PeopleSoft Campus Solutions 9.0: Financial Aid).

**Related Links**

"Managing Loan Counseling Data" (PeopleSoft Campus Solutions 9.0: Financial Aid)
Setting Up Satisfactory Academic Progress Self-Service Options

This section discusses identifying an informational URL for Satisfactory Academic Progress and defining custom text for various Satisfactory Academic Progress statuses in Financial Aid Self-Service.

Page Used to Set Up Satisfactory Academic Progress Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Options</td>
<td>SS_FA_INSTALL4</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, SAP Options</td>
<td>Control the display of the SAP informational link and SAP status text.</td>
</tr>
</tbody>
</table>

SAP Options for Self-Service

Access the SAP Options page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, SAP Options).

Image: SAP Options page

This example illustrates the fields and controls on the SAP Options page. You can find definitions for the fields and controls later on this page.

SAP Information URL

Enter the URL to display on the SAP Detail page. If populated, this URL is accessible to students when selecting the SAP link from the Self-Service Student Awards page. If left blank, a link does not appear.

Satisfactory Academic Progress Status Messages

In the SAP Status Message group box, set up text to be displayed for each of the system SAP statuses used in the Packaging Status Summary.
SAP Status
Select one of the SAP statuses used in the Packaging Status Summary.

Default Status Text
Displays the SAP Status translate value long name. This displays as the SAP Status on the student's SAP Detail page if there is no Alternate Status Text defined.

Alternate Status Text
Optionally enter alternate SAP status text to display on the Student SAP Detail page instead of the Default Status Text

Status Message
Optionally enter additional text explaining the SAP status.

Setting Up Self-Service Actions and Access in Packaging

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

This section discusses how to:

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

Pages Used to Set Up Self-Service Actions and Access in Packaging

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FA Item Type 3</td>
<td>ITEM_TYPE_FA_3</td>
<td>Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3</td>
<td>Set up disbursement information and self-service action options.</td>
</tr>
<tr>
<td>Packaging Status Summary</td>
<td>STDNT_AID_PACKAGE</td>
<td>Financial Aid, View Packaging Status Summary, Packaging Status Summary</td>
<td>Review the student's need, budget, and award or change the student's packaging status. Set the student's self-service inquiry and award access.</td>
</tr>
<tr>
<td>Self-service Security</td>
<td>SFA_RUNCTL_SS_SEC</td>
<td>Financial Aid, Awards, Self Service Awarding, Assign Self Service Access, Self Service Security</td>
<td>Set the award and inquiry access value.</td>
</tr>
</tbody>
</table>
Defining Self-Service Actions in Packaging

Access the FA Item Type 3 page (Set Up SACR, Product Related, Financial Aid, Awards, Financial Aid Item Types, FA Item Type 3).

Image: FA Item Type 3 page

This example illustrates the fields and controls on the FA Item Type 3 page. You can find definitions for the fields and controls later on this page.

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

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

Self Service Actions

Accept

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

Reduce

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

You cannot select the Reduce option if the Federal ID value is ACG or SMART on the FA Item Type 1 page

Decline

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

Note: If you set the Print Letter Option field to Never or blank, the system displays the award on the Financial Aid - Award Summary page (View My Financial Aid), but not on the Award Package page (Accept/Decline Financial Aid).
Related Links
"Defining Item Type Disbursement Rules" (PeopleSoft Campus Solutions 9.0: Financial Aid)
"Defining Disbursement and Anticipated Aid" (PeopleSoft Campus Solutions 9.0: Financial Aid)

Defining Self-Service Access in Packaging

Access the Packaging Status Summary page (Financial Aid, View Packaging Status Summary, Packaging Status Summary).

Image: Packaging Status Summary page

This example illustrates the fields and controls on the Packaging Status Summary page. You can find definitions for the fields and controls later on this page.

### Packaging Status Summary

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarot Name</td>
<td>FA86003</td>
</tr>
<tr>
<td>Aid Year</td>
<td>2007</td>
</tr>
<tr>
<td>Institution</td>
<td>PSUNIV</td>
</tr>
<tr>
<td>FAF Status</td>
<td>Official</td>
</tr>
<tr>
<td>Aid Application Status</td>
<td>Active</td>
</tr>
<tr>
<td>Review Status</td>
<td>Incomplete</td>
</tr>
<tr>
<td>INST Verification Status</td>
<td>Non Select</td>
</tr>
<tr>
<td>Verification Flag</td>
<td>Not Reqd</td>
</tr>
<tr>
<td>Scholarship Status</td>
<td>Not Eval</td>
</tr>
<tr>
<td>Aid Packaging Method</td>
<td>Not Pkgd</td>
</tr>
<tr>
<td>Repackaging Plan ID</td>
<td></td>
</tr>
<tr>
<td>Aggregate Source</td>
<td>Default</td>
</tr>
<tr>
<td>Aggregate Used</td>
<td></td>
</tr>
</tbody>
</table>

**Self-Service**

You can set these values in a background process by running the Assign Self Service Access process.

**Award Access**

Select *Allowed* to allow the student access to award acknowledgement for the given year regardless of filtering option criteria established in self-service awarding options setup.

Select *Denied* to deny the student access to award acknowledgement for the given year regardless of filtering option criteria established in self-service awarding options setup.
Setting Up Financial Aid Self-Service

Chapter 7

Select *Use Filter* to require the student to meet the self-service awarding options access criteria to gain access to an award acknowledgment in self-service awarding.

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

**External Award Access**
Select to allow a student access to view reported external awards.

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

### Changing Award and Inquiry Access


**Image: Self-service Security page**

This example illustrates the fields and controls on the Self-service Security page. You can find definitions for the fields and controls later on this page.

#### Self-service Security

<table>
<thead>
<tr>
<th>Run Control ID:</th>
<th>ANDY</th>
<th></th>
<th>Report Manager</th>
<th>Process Monitor</th>
<th>Run</th>
</tr>
</thead>
</table>

**Parameters**

- **Award Access:** Allowed
- **Inquiry Access:** Yes
- **EA Access:** Yes
- **Institution:** PSUNV
- **Aid Year:** 2007

Use this page to change the value in the Award Access and Inquiry Access fields on the Packaging Status Summary page. This controls whether a student can access either area of self-service.

**Award Access**
Select *Allowed, Denied,* or *Use Filter.*

**Inquiry Access**
Select *Yes* or *No.*

**EA Access**
Select *Yes* or *No.*

**Institution**
Select your institution.

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

**All IDs**
Select to update or change all IDs.

**ID Range**
Select to update or change a range of IDs.
Modifying Self-Service Loan Status Descriptions

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

This section discusses how to modify loan status descriptions.

Page Used to Modify Self-Service Loan Status Descriptions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Service Loan Status</td>
<td>SS_FA_LOAN_STAT</td>
<td>Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status</td>
<td>Modify loan status descriptions and comments text that you want a student to see online. This page provides students with their loan application status. These values are delivered by Oracle.</td>
</tr>
</tbody>
</table>

Modifying Loan Status Descriptions

Access the Self-Service Loan Status page (Set Up SACR, Common Definitions, Self Service, Financial Aid, Self-Service Loan Status).

Image: Self-Service Loan Status page

This example illustrates the fields and controls on the Self-Service Loan Status page. You can find definitions for the fields and controls later on this page.

Self-Service Loan Status

<table>
<thead>
<tr>
<th>Proc Status</th>
<th>Trans Status</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>Accepted</td>
<td>Canceled</td>
<td>Your canceled loan has been processed by your loan.</td>
</tr>
<tr>
<td>Canceled</td>
<td>Ong Pend</td>
<td>Canceled</td>
<td>Due to a change in your eligibility your loan has been</td>
</tr>
<tr>
<td>Canceled</td>
<td>Error</td>
<td>Invalid</td>
<td></td>
</tr>
<tr>
<td>Canceled</td>
<td>Ong Pend</td>
<td>Invalid</td>
<td></td>
</tr>
<tr>
<td>Canceled</td>
<td>Trans</td>
<td>Canceled</td>
<td>Your canceled loan has been sent to your loan service.</td>
</tr>
<tr>
<td>Hold</td>
<td>Accepted</td>
<td>In Process</td>
<td>Your loan application is being reviewed by the FA Office</td>
</tr>
<tr>
<td>Hold</td>
<td>Ong Pend</td>
<td>In Process</td>
<td>Your loan application is being reviewed by the FA Office</td>
</tr>
<tr>
<td>Hold</td>
<td>Error</td>
<td>Invalid</td>
<td></td>
</tr>
<tr>
<td>Hold</td>
<td>Ong Pend</td>
<td>In Process</td>
<td>Your loan application is being reviewed by the FA Office</td>
</tr>
<tr>
<td>Hold</td>
<td>Trans</td>
<td>In Process</td>
<td>Your loan application is being reviewed by the FA Office</td>
</tr>
<tr>
<td>Offered</td>
<td>Accepted</td>
<td>Invalid</td>
<td></td>
</tr>
<tr>
<td>Offered</td>
<td>Ong Pend</td>
<td>Invalid</td>
<td></td>
</tr>
</tbody>
</table>
You can view or modify the status and comments text that you want a student to view online.

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

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

---

### Creating User-Defined Text

Each self-service page has an area for additional explanatory text. The text resides in the message catalog. The system displays the message number to help you determine the text to include on a page. If you do not want a message on a particular page, you can delete the text in the message catalog or delete the message entirely. However, Oracle suggests that you delete only the text, not the reference number, so that you can add text as needed in the future.

You might add user-defined text to:

- Explain why disbursed awards cannot be updated.
- Explain why custom split awards cannot be updated.
- Explain why subsidized and unsubsidized loans have automatic treatment.
- Explain why loans in transit cannot be updated.
- Provide general rules of navigation.
- Provide specific information, such as instructing students not to increase awards.

Message numbers 500 and greater for Message Set 14409 are designated as user-definable. Oracle delivers some message numbers with defined message text and explanation as examples.
Chapter 8

Setting Up Recruiting and Admissions Self-Service

Setting Up Application Status and Checklist Options

The Application Status self-service page, the Admissions section of the Student Center and Student Services Center pages, and the Campus Mobile admission application pages can display the application status. Also, the Application Status page and the Campus Mobile admission application pages can display the checklist due date and checklist contact. This section discusses how you can control the display of the application status, checklist due date, and checklist contact on these pages.

Page Used to Set Up Application Status and Checklist Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Status Options</td>
<td>SAD_APPL_STATUS</td>
<td>Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Applicant Status Options</td>
<td>Control the display of the application status, checklist item due date, and checklist item contact for an application based on the academic institution and academic career.</td>
</tr>
</tbody>
</table>

Setting Applicant Status and Checklist Options

Access the Applicant Status Options page (Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Applicant Status Options).

Image: Applicant Status Options page

This example illustrates the fields and controls on the Applicant Status Options page. You can find definitions for the fields and controls later on this page.
**Show Application Status**

Select to display the application status on the Application Status, Student Center and Student Services Center pages and the mobile admission application pages. The application statuses are complete, incomplete and admitted.

**Note:** The status of the application is based on the Complete check box of the Application Data page (Student Admissions, Application Maintenance, Maintain Applications, Application Data). If the Show Application Status check box is selected and if you select the Complete check box for an application, then the system displays the application status as completed. If the Show Application Status check box is selected and the Complete check box for an application is deselected, then the system displays the application status as incomplete. The Complete check box (ADM_APPL_DATA.ADM_APPL_COMPLETE) setting can be updated manually or by using the delivered Population Update process for ADM_APPL_DATA.

See "Running the Population Update Process" (PeopleSoft Campus Solutions 9.0: Campus Community)

**Show Checklist Item Due Date**

Select to display the due date on the mobile admission application pages and the Outstanding Items for this Application section of the Application Status page.

**Show Checklist Item Contact**

Select to display the checklist contact on the mobile admission application pages and the Outstanding Items for this Application section of the Application Status page.

**Examples**

Suppose you have selected all the check boxes for PSUNV (PeopleSoft University) and Graduate on the Applicant Status Options page and the Complete check box has not been selected for a PSUNV- Fine Arts Graduate application. In such a case, the Admissions section in the Student Center displays the incomplete status for the application:

**Image: Admissions section displaying application status**

This is an example of Admissions section displaying the application status.

<table>
<thead>
<tr>
<th>Admissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>△ Incomplete</td>
</tr>
</tbody>
</table>

**Request Information Apply for Admission**

<table>
<thead>
<tr>
<th>My Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft University</td>
</tr>
</tbody>
</table>

The applicant clicks the View Status link for Fine Arts Graduate application to navigate to the Application Status page. The system displays the *Show outstanding items for this application* button on the
Application Status page. When the applicant clicks this button, she or he can view the outstanding checklist items with the due dates and contact names:

**Image: Example of Applicant Status page displaying Due Date and Contact columns**

This is an example of Applicant Status page displaying the Due Date and Contact columns.

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Term</th>
<th>Academic Career</th>
<th>Program</th>
<th>Application Number</th>
<th>Application Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft University</td>
<td>2017 Fall</td>
<td>Graduate</td>
<td>Graduate Fine Arts Programs</td>
<td>00024948</td>
<td>01/27/2014</td>
</tr>
</tbody>
</table>

If you did not select the Show Application Status check box and the Complete check box has not been selected for the PSUNV- Fine Arts Graduate application, the Admissions section in the Student Center page will not display the incomplete status for the application.

**Image: Example of Admissions section not displaying application status**

This is an example of Admissions section not displaying the application status.
If you did not select the Show Checklist Item Due Date and Show Checklist Item Contact check boxes, the Outstanding Items for this Application section will not display the Due Date and Contact columns.

**Image: Example of Applicant Status page not displaying Due Date and Contact columns**

This is an example of Applicant Status page not displaying the Due Date and Contact columns.

---

**Understanding Self-Service Request Information**

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

**Prerequisites**

Before you can set up your parameters for the Request Information transaction, you must set up a communications infrastructure in PeopleSoft 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.

**Related Links**

"Defining Communication Speed Keys" (PeopleSoft Campus Solutions 9.0: Campus Community)
"Defining 3C Engine Events" (PeopleSoft Campus Solutions 9.0: Campus Community)
Requesting Information

---

**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**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Prospect Setup</td>
<td>ADM_WEB_PRS_TBL</td>
<td>Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table</td>
<td>Enable or disable Request Information self-service transaction segments and prospect career fields.</td>
</tr>
<tr>
<td>Web Prospect Setup 2</td>
<td>ADM_WEB_PRS2_TBL</td>
<td>Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table, Web Prospect Setup 2</td>
<td>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.</td>
</tr>
</tbody>
</table>
Enabling Segments and Prospect Career Fields

Access the Web Prospect Setup page (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table).

Image: Web Prospect Setup page

This example illustrates the fields and controls on the Web Prospect Setup page. You can find definitions for the fields and controls later on this 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

- 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

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 (ADM_INTEREST_ADMP) and Test Scores (ACAD_TST_RSLT_ADMP) 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 (ADM_PROSPECT_PROG). 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 (Set Up SACR, Product Related, Recruiting and Admissions, Prospects, Web Prospect Create Table, Web Prospect Setup 2).

**Image: Web Prospect Setup 2 page**

This example illustrates the fields and controls on the Web Prospect Setup 2 page. You can find definitions for the fields and controls later on this page.

Acad Int/Test Results Defaults

**Data Source**

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

Institution Setup Parameters

**Academic Institution**

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

### Recruiting Status

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

### Referral Source

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

### Career Setup Parameters

#### Academic Career

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

#### Recruiting Center

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

#### Allow Prospect to Select Comm (allow prospect to select communication)

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

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

**Event ID**

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

See "Creating an Event" (PeopleSoft Campus Solutions 9.0: Campus Community).
### Setting Up Self-Service Features for Academic Advisement

To set up self-service Academic Advisement features, use the Academic Advising setup (SAA_SS_RPT_OPT) component.

This section discusses how to define Academic Advisement setup.

### Page Used to Set Up Self-Service Features for Academic Advisement

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Advising Setup</td>
<td>SAA_SS_RPT_OPT</td>
<td>Set up SACR, Common Definitions, Self Service, Academic Advising</td>
<td>Enable self-service features and define behavior for self-service Academic Advisement functionality.</td>
</tr>
</tbody>
</table>
Defining Academic Advisement Setup

Access the Academic Advising Setup page (Set Up SACR, Common Definitions, Self Service, Academic Advising).

Image: Academic Advising Setup page

This example illustrates the fields and controls on the Academic Advising Setup page. You can find definitions for the fields and controls later on this page.

Enable real-time processing

Select to instruct the system to automatically generate an advisement report when students access the My Academic Requirements page.

Use the two radio buttons to indicate that your institution wants to use real-time processing with or without synchronization options (also referred to as triggers).

If you enable real-time processing and select Always refresh, then the system will regenerate a report when the student accesses My Academic Requirements, Search by My Requirements, or Plan by My Requirements. That is, the report is regenerated regardless of whether anything changed on the student's record.

Note: On the administrative side, the system will also regenerate the report if the user accesses a previously run report and, from the Report Request page, clicks the View Report link.

Advisor access obeys security

Select to use the Advisement Report Security component to manage advisors' ability to view the advisement reports of their
advisees in self service. By default, this check box is cleared, and advisors may view all advisement reports that have been generated for their advisees, regardless of their institution. Remember that the advisement reports that advisors access from My Advisees are those defined in the Student Academic Requirement Report field on the Academic Institution 7 page.

Enable the course what-if option

Select to enable students to run a course what-if scenario in self-service using the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page. Clear the check box to disable this ability.

Student What-If Career Requirement Term

This field is for use with the What-If Report – Create What-if Scenario page, which a student can use to define a what-if career scenario and generate a what-if advisement report based on his or her what-if career, program, plan, or subplan.

The field values here affect what requirement term value or values the student sees in the Catalog Year field on the What-If Report – Create What-if Scenario page.

Use Career Requirement Term Only is the default value. By default, the term value that the Catalog Year field displays on the Create What-if Scenario page is the student’s career requirement term. If a student has no career requirement term, the field displays the student’s primary program requirement term. With this selection, the Catalog Year field is not editable by the student.

If you want to enable students to change the Catalog Year field value (that is, the career requirement term value to be used in the what-if audit), select the Use Term Table Setup field value. You can then define valid begin and end dates on the Term Table page. With this option, you control (using begin and end dates) the (requirement) terms available to the students when they define their what-if career scenario.

Related Links
"Defining Terms, Sessions, and Session Time Periods" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)
"Understanding Academic Requirement Groups" (PeopleSoft Campus Solutions 9.0: Academic Advisement)
Setting Up Self-Service Features for Academic Advisement

Defining Self-Service Installation Settings

To define conditions under which an advisement report is generated for self service, use the Academic Advisement installation component (SAA_INSTALL_AA).
This section discusses how to define installation settings for Academic Advisement.

### Page Used to Define Self-Service Installation Settings

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation Academic Advisement</td>
<td>SAA_INSTALL_AA</td>
<td>Set Up SACR, Install, Academic Advising Installation, Installation</td>
<td>Disable on-demand report processing and enable the system to track which students need to have new reports generated, based on changes made to their academic history.</td>
</tr>
</tbody>
</table>

### Installing Self-Service Academic Advisement

Access the Installation Academic Advisement page (Set Up SACR, Install, Academic Advising Installation).

**Image: Installation Academic Advisement page**

This example illustrates the fields and controls on the Installation Academic Advisement page. You can find definitions for the fields and controls later on this page.

**Installation Academic Advisement**

**Report Defaults**

<table>
<thead>
<tr>
<th>As of Date</th>
<th>01/01/3000</th>
</tr>
</thead>
</table>

**Result Defaults**

- Results Obey Select Line

**Advisement Report Synchronization Options**

Select the functional areas listed below that will set the synchronization flag for a student if any changes occur to their records in the functional area. Adding, modifying, or deleting any records within a selected functional area will trigger the setting of the synchronization flag for the student.

- [ ] Enrollment Records
- [ ] Academic Structure Records
- [ ] Transfer Credit Records
- [ ] Student Group Record
- [ ] Internal Degree Records
- [ ] Academic Level Records
- [ ] External Degree Records
- [ ] Milestone Records
- [ ] Student Planner Records
- [ ] Shopping Cart Records
- [✓] Student Exception Records
- [✓] Course Substitution Records

The check boxes on this page determine under which conditions a student’s academic history will cause the system to generate an advisement report for a student. If the institution has enabled real-time processing (on the Academic Advising Setup page) and selected check boxes on this page, a new advisement report will be generated when a student accesses the My Academic Requirements page. If the institution has not enabled real-time processing, the institution can use the conditions to "trigger" a batch process to run and generate advisement reports at predefined intervals. To run the advisement reports in batch based on these synchronization options, your institution will use the Generate Report Requests (SAA_RC_RPTRQST) and Generate Advisement Reports (SAA_RC_RPTGEN) components.
Selecting a check box causes the system to set a synchronization (sync) flag for that change. In turn, the flag cues the institution to rerun the advisement report. Here are the actions for each check box that set a sync flag:

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Records</td>
<td>Adding, deleting, or modifying any enrollment records through Enrollment, Enrollment Requests, Quick Enrollment, or Grading.</td>
</tr>
<tr>
<td>Transfer Credit Records</td>
<td>Posting or unposting any transfer credit.</td>
</tr>
<tr>
<td>Internal Degree Records</td>
<td>Awarding, revoking, or modifying any degree record through the Student Program/Plan, Degree Maintenance, or Batch Graduation Processing pages.</td>
</tr>
<tr>
<td>External Degree Records</td>
<td>Adding, modifying, or removing any externally awarded degrees through the External Education pages.</td>
</tr>
<tr>
<td>Student Planner Records</td>
<td>Adding, modifying, or removing any records from the student's planner.</td>
</tr>
<tr>
<td>Academic Structure Records</td>
<td>Adding, modifying, or removing any values from the student's Records Program stack. This also includes admissions matriculation.</td>
</tr>
<tr>
<td>Student Group Record</td>
<td>Adding, modifying, or removing any advisement student group values for a student.</td>
</tr>
<tr>
<td>Academic Level Records</td>
<td>Making any changes to a student's academic level, either by automated processes from grading and enrollment or through manual override in term processing.</td>
</tr>
<tr>
<td>Milestone Records</td>
<td>Adding, modifying, or removing any milestone values for a student.</td>
</tr>
<tr>
<td>Shopping Cart Records</td>
<td>Adding, modifying, or removing any records in the student's Shopping Cart.</td>
</tr>
<tr>
<td>Student Exception Records</td>
<td>Reprocessing when a student override is made.</td>
</tr>
<tr>
<td>Course Substitution Records</td>
<td>Reprocessing when a course substitution is made using the Create Course Substitution component (STDNT_CRS_SUBS). The flag is also set when there is any change made to the component, whether it is a change to the long description or to the substitution detail itself.</td>
</tr>
</tbody>
</table>
Example

An institution selects the *Enrollment Records* check box. A student has an advisement report dated May 10, 2006. The current date is July 18, 2006 and the student has just enrolled in a summer school class. The change to the student's enrollment record sets a synchronization flag. The institution nightly runs a batch process to generate new advisement reports for students for whom the synchronization flag is set to "Y." On the following day, the student looks at his My Academic Requirements page. The advisement report that appears there will be up to date (with a date and time stamp as of the previous night's batch process).

Alternatively, if the institution has selected the Enable real-time processing check box on the Academic Advising Setup page, then when student enrolls in a class then the system automatically generates the report to automatically (in real time) when the student next accesses the My Academic Requirements page. The student will immediately see the course he's just enrolled in.
Chapter 10

Setting Up Campus Mobile

Campus Mobile Licensing

Campus Self Service Mobile is comprised of elements delivered in the PeopleSoft Campus Solutions maintenance stream as well as the Oracle Campus Self Service Mobile app itself. The Oracle Campus Self Service Mobile program may be accessed at http://www.oracle.com/technetwork/indexes/downloads/index.html. You must comply with all of the license terms and conditions with respect to the Oracle program.

In addition, you may be required to acquire a license for ADF, depending on the specific deployment desires and requirements of your institution.

See Campus Mobile Implementation Guide on My Oracle Support for more information.

Understanding Campus Mobile Technology

The Campus Mobile application is built with Oracle’s ADF Mobile framework which enables deployment to both iOS and Android native application types. The ADF Mobile framework allows a campus to easily extend the Campus Mobile application to include mobile websites and other content.


Getting Started With Campus Mobile

This section provides high-level views of Campus Mobile functionality.

Campus Mobile Overview

Campus Mobile is a new self-service interface designed for smartphone form factor devices. It is delivered as part of Campus Solutions Self Service and is deployed as an iOS or Android application. The application features high-value transactions to which students desire to have constant, always-available access. Features of Campus Mobile include the ability to: view class schedule, view grades, view schedule of classes, enroll in classes, manage the enrollment shopping cart, and view finances, “to do's” and holds. Further, Campus Mobile takes advantage of the new Campus Solutions notification framework to provide proactive communication to students. Delivered with Campus Mobile are a number of notifications (for example, the system notifies a student when a grade is posted). Each event that triggers a notification can be configured to use one or more communication channels (such as, email, SMS, and push notifications). In addition, the Campus Solutions notification framework also provides the ability for a student to manage how they receive notifications. The Campus Mobile smartphone application is a secure, simplified, and personalized platform for students to conduct key Self Service
processes. Your institution can brand, customize, and extend the Campus mobile application to suit your campus requirements.

**Campus Mobile Integrations**

Campus Mobile utilizes delivered Campus Solutions web services such as the Enrollment Web Service (EWS). For Campus Mobile, a RESTful version of the delivered web services are deployed. To optimize the web service performance, Campus Mobile takes advantage of the Entity Profiling features new to Campus Solutions.

By taking advantage of PeopleTools 8.52 functionality we are able to deliver RESTful versions of the delivered web services. RESTful web services require lower overhead than SOAP-based services, thus lowering the bandwidth requirement for delivering data to a mobile device. Entity Profile gives us the ability to create and use a mobile profile that will limit the amount of data delivered in the web service payload to the subset of data that Campus Mobile needs, thus again lowering the bandwidth requirement for delivering data to a mobile device.

Campus Mobile uses delivered Campus Solutions Authentication and Authorization web services. These are RESTful web services that make it possible for users to log into Campus Mobile with the same credentials as they use in Campus Solutions Self Service. The security role, CS Mobile Student, is used to provide access to Campus Mobile. For further information on the implementation of security in Campus Mobile, see the *Campus Mobile Implementation Guide*.

Campus Mobile also uses delivered Campus Solutions User Preferences web services to retrieve the data displayed in the Campus Mobile Profile feature. For further information on the implementation of the web services see the *Campus Mobile Implementation Guide*.

**Important!** Campus Mobile requires a minimum level of PeopleTools 8.52 due to the REST implementation requirement.

See:

- "Understanding Financial Aid Web Services" (PeopleSoft Campus Solutions 9.0: Financial Aid)
- "Using the SSF_EPAYMENT_TRANS Web Service" (PeopleSoft Campus Solutions 9.0: Student Financials)
- "Using Entity Registry Based Constituent Web Service Operations" (PeopleSoft Campus Solutions 9.0: Campus Community)
- EWS documentation in My Oracle Support

**Campus Mobile Implementation**

Campus Mobile implementation involves configuring Campus Solutions, configuring and branding the Campus Mobile application itself and delivering the Campus Mobile application to students through channels such as the Apple App Store and Google Play. The following sections of this document discuss configuring Campus Solutions; see the *Campus Mobile Implementation Guide* for configuring and branding information.

**Licensing ADF Mobile**

ADF Mobile is licensed as part of the ADF/Toplink solution, which can be licensed separately and is also included in the Weblogic Enterprise license. The license to PeopleTools that you received upon
licensing the Campus Self Service product includes a Restricted Use License to Weblogic. With your existing license you can use ADF Mobile to rebrand, sign, and compile the delivered mobile archive file. In addition, the Restricted Use License allows you to enhance and modify the Campus Self Service Mobile app to interact with delivered PeopleSoft functionality and data in delivered tables. If you wish to enhance or modify the Campus Self Service Mobile app in a way that does not interact with a PeopleSoft application or delivered tables or to create entirely new apps, you will need to license ADF/Toplink either specifically or through a Weblogic Enterprise license.

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**Setting Up Campus Mobile Within Campus Solutions**

This section provides an overview of Campus Mobile setup and discusses how to:

- Set up Integration Broker for Campus Mobile.
- Activate Campus Mobile service operations, handlers, and routings.
- Manually generate routings for service operations.
- Set up logging for troubleshooting.
- Set up Campus Mobile security.
- Secure List of Values services.
- Add security access to Campus Mobile service operations
- Set up instructor contact information.
- Set up finances.
- Set up contributions.
- Set up applications.
- Customize and brand Campus Mobile.
- Deploy Campus Mobile.

**Understanding Campus Mobile Setup**

Campus Mobile is a smartphone app that uses delivered Campus Solutions web services to provide data directly to the user's phone that will then be rendered by the Campus Mobile screens. To enable the web services that Campus Mobile requires, you will need to configure Integration Broker as well as the appropriate security for your web services. To enable building mapping (a feature accessed in Campus Mobile through the Class Section Details), you will need to populate the latitude and longitude for each building.
Page Used to Set Up Campus Mobile Within Campus Solutions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor Contact Information</td>
<td>SCC_INSTR_CT</td>
<td>Set Up SACR, Product Related, Campus Mobile, Instructor Contact Setup</td>
<td>Define which address, phone and email types will be used for display of instructor contact information to students.</td>
</tr>
</tbody>
</table>

Setting Up Integration Broker for Campus Mobile

We assume that you have performed and validated all the basic Integration Broker setup. Refer to the Integration Broker for information on Integration Broker gateway setup and service configuration.

**Note:** Because Campus Mobile uses the RESTful versions of the delivered web services, it is important to ensure that even if you have previously set up Integration Broker, you have entered the appropriate URL in the Target Location field of the REST Services Target Locations.

See *PeopleTools PeopleSoft Integration Broker Administration*, “Configuring PeopleSoft Integration Broker for Handling Services”

Activating Campus Mobile Service Operations, Handlers, and Routings

Service operations for the Campus Mobile are delivered with a status of *Inactive* to prevent the accidental transmission of data. In order to make use of these key elements of the Campus Mobile at the time of implementation, you need to set each of them to a status of *Active*.

To activate service operations:

1. Log into the PeopleSoft application in a browser.
3. Select each of the service operations from the Campus Mobile Service Operations tables.
4. On the General page, select the *Active* check box in the Default Service Operation Version group.
5. Select the Handlers page and select the *Active* option from the drop-down list for the Status column.
6. Save the page.
7. Select the Routings tab, select the check box against the routing name, and click the Activate Selected Routings button.

Campus Mobile Service Operations Table

The following web service operations, handlers, and routings must be activated for Campus Mobile:

<table>
<thead>
<tr>
<th>Service Operation</th>
<th>Handler</th>
<th>Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC_GET_LOV_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_GET_LOV_R_POST</td>
</tr>
<tr>
<td>Service Operation</td>
<td>Handler</td>
<td>Routing</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>SCC_GET_USERPREF_R_GET</td>
<td>REQUESTHDLR</td>
<td>SCC_GET_USERPREF_R_GET</td>
</tr>
<tr>
<td>SCC_SC_ADDITEM_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_ADDITEM_R_POST</td>
</tr>
<tr>
<td>SCC_SC_CHECKOUT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_CHECKOUT_R_POST</td>
</tr>
<tr>
<td>SCC_SC_CLEARCART_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_CLEARCART_R_POST</td>
</tr>
<tr>
<td>SCC_SC_GETCART_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_GETCART_R_POST</td>
</tr>
<tr>
<td>SCC_SC_GETITEM_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_GETITEM_R_POST</td>
</tr>
<tr>
<td>SCC_SC_REMOVEITEM_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_REMOVEITEM_R_POST</td>
</tr>
<tr>
<td>SCC_SC_SAVECART_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_SAVECART_R_POST</td>
</tr>
<tr>
<td>SCC_SC_VALIDATE_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SC_VALIDATE_R_POST</td>
</tr>
<tr>
<td>SCC_SUBMIT_USERPREF_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_SUBMIT_USERPREF_R_POST</td>
</tr>
<tr>
<td>SCC_USERREG_AUTHORIZE_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_USERREG_AUTHORIZE_POST</td>
</tr>
<tr>
<td>SCC_USERREG_AUTH_GET</td>
<td>REQUESTHDLR</td>
<td>SCC_USERREG_AUTH_GET</td>
</tr>
<tr>
<td>SSR_ADD_ENROLLMENT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_ADD_ENROLLMENT_R_POST</td>
</tr>
<tr>
<td>SSR_DROP_ENROLLMENT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_DROP_ENROLLMENT_R_POST</td>
</tr>
<tr>
<td>SSR_EDIT_ENROLLMENT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_EDIT_ENROLLMENT_R_POST</td>
</tr>
<tr>
<td>SSR_ENR_VALIDATE_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_ENR_VALIDATE_R_POST</td>
</tr>
<tr>
<td>SSR_GET_CLASSES_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_GET_CLASSES_R_POST</td>
</tr>
<tr>
<td>SSR_GET_CLASS_SECTION_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_GET_CLASS_SECTION_R_POST</td>
</tr>
<tr>
<td>SSR_GET_COURSES_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_GET_COURSES_R_POST</td>
</tr>
<tr>
<td>SSR_GET_COURSE_OFFERING_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_GET_COURSE_OFFERING_R_POST</td>
</tr>
<tr>
<td>SSR_GET_ENROLLMENT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_GET_ENROLLMENT_R_POST</td>
</tr>
<tr>
<td>SSR_STDNT_ENRL_OPTIONS_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_STDNT_ENRL_OPTIONS_R_POST</td>
</tr>
</tbody>
</table>
### Manually Generating Routings for Service Operations

Some service operations do not have routings generated by default so you will need to generate routings for them separately.

Follow these steps to generate routings for the User Registration Service:

1. Log into the PeopleSoft application in a browser.

<table>
<thead>
<tr>
<th>Service Operation</th>
<th>Handler</th>
<th>Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSR_STUDYLIST_DEADLINES_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_STUDYLIST_DEADLINES_R_POST</td>
</tr>
<tr>
<td>SSR_SWAP_ENROLLMENT_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSR_SWAP_ENROLLMENT_R_POST</td>
</tr>
<tr>
<td>SSR_ENROLLMENT_SYNC</td>
<td>ONNOTIFY</td>
<td>--</td>
</tr>
<tr>
<td>SCC_USERREG_AUTHENTICATE*</td>
<td>REQUESTHDLR</td>
<td>--</td>
</tr>
<tr>
<td>SCC_GET_CHECKLIST_R_POST</td>
<td>REQUESTHDLR</td>
<td>--</td>
</tr>
<tr>
<td>SCC_GET_SERVICE_INDICATORS_R_G</td>
<td>REQUESTHDLR</td>
<td>--</td>
</tr>
<tr>
<td>SFA_GET_STUDENT_AWARDS_R_POST</td>
<td>REQUESTHDLR</td>
<td>--</td>
</tr>
<tr>
<td>SSF_GET_STUDENT_ACCOUNT_R_POST</td>
<td>REQUESTHDLR</td>
<td>--</td>
</tr>
<tr>
<td>SCC_LOOKUP_DIRECTORY_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_LOOKUP_DIRECTORY_R_POST</td>
</tr>
<tr>
<td>SCC_GETPHOTO_R_GET</td>
<td>REQUESTHDLR</td>
<td>SCC_GETPHOTO_R_GET</td>
</tr>
<tr>
<td>SAV_CREATE_INV_R_GET</td>
<td>REQUESTHDLR</td>
<td>SAV_CREATE_INV_R_GET</td>
</tr>
<tr>
<td>SAV_SAVE_INV_R_POST</td>
<td>REQUESTHDLR</td>
<td>SAV_SAVE_INV_R_POST</td>
</tr>
<tr>
<td>SSF_INIT_EPAY_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSF_INIT_EPAY_R_POST</td>
</tr>
<tr>
<td>SSF_CMPLT_EPAY_R_POST</td>
<td>REQUESTHDLR</td>
<td>SSF_CMPLT_EPAY_R_POST</td>
</tr>
<tr>
<td>SAD_GET_APPL_STS_R_GET</td>
<td>REQUESTHDLR</td>
<td>SAD_GET_APPL_STS_R_GET</td>
</tr>
<tr>
<td>SAD_GET_APPL_TODO_R_GET</td>
<td>REQUESTHDLR</td>
<td>SAD_GET_APPL_TODO_R_GET</td>
</tr>
<tr>
<td>SCC_GETCONST_R_GET</td>
<td>REQUESTHDLR</td>
<td>SCC_GETCONST_R_GET</td>
</tr>
</tbody>
</table>

* SCC_USERREG_AUTHENTICATE is used only in Campus Mobile 4.0 and earlier.


4. On the General page, select the Generate Any-to-Local check box.

5. Save the page.

Follow these steps to generate routings for the Enrollment Sync Service:

1. Log into the PeopleSoft application in a browser.


4. On the General page, select the Generate Local-to-Local check box.

5. Save the page.

Follow the same steps to Generate Any-to-Local routings for the following service operations:

- SCC_GET_CHECKLIST_R_POST
- SCC_GET_SERVICE_INDICATORS_R_G
- SFA_GET_STUDENT_AWARDS_R_POST
- SSF_GET_STUDENT_ACCOUNT_R_POST.

**Setting Up Logging for Troubleshooting**

By default, only error messages appear on the Integration Broker Synchronous Service Monitor screen. During testing, it may be helpful to increase the logging detail of the web service messages in order to detect all messaging activity through the Integration Broker Synchronous Service Monitor screen. Increasing the log detail to “Header and Detail” will enable synchronous message header information and XML message content to appear in the Service Operations Monitor.

The following steps enable logging in greater detail of the web service messages for Campus Mobile:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations.

2. Enter each of the service operation names from the list of service operations used in Campus Mobile, such as SSR_ADD_ENROLLMENT_R_POST.

3. Click Search.

4. Select the Routings tab.

5. On the Routing Definitions page, change Log Detail from No Logging to Header and Detail.

For more information, access the Configuring Routing Definitions page (PeopleTools, PeopleSoft Integration Broker, Managing Service Operation Routing Definitions, Configuring Routing Definitions).

**Note:** We do not recommended that you turn on logging in production environments; however it can be useful in QA and development environments.
Setting Up Campus Mobile Security

Users log into Campus Mobile using the same credentials that they use for Campus Self Service access through PIA. These credentials pass to PeopleTools using the Authentication and Authorization web services (Service operations SCC_USERREG_AUTH_GET and SCC_USERREG_AUTHORIZE_POST in the Campus Mobile Service Operations chart above).

The delivered authorization model is different for V3.1 (and earlier versions) and V4 as outlined below.

Campus Mobile V3.1 and earlier:

For Campus Mobile V3.1 and earlier, the permission list HCCPCSSA3000 determines whether a user is authorized to access the Campus Mobile features. The security role, CS Mobile Student, is delivered by default with the HCCPCSSA3000 permission list added to it. You have the flexibility to deploy security for Campus Mobile in the way that fits your institution’s requirements. Your options include:

- Assign the delivered CS Mobile Student role to students who need access to Campus Mobile.
- Assign the delivered HCCPCSSA3000 PL to a role that is (already) assigned to students who need access to Campus Mobile.
- Customize the Campus Mobile application to use a different permission list as described in the Campus Mobile Implementation Guide.

Campus Mobile V4:

Beginning with V4 of Campus Mobile, a more granular security model is delivered. Each Campus Mobile feature is assigned its own permission list that is checked to determine whether a user is authorized for access to that feature. With this security model, access to features can be readily controlled with security configuration. For example, with the delivered security roles, students that do not participate in Financial Aid can simply not have the CS Mobile Financial Aid role added to their user profile. Then they will not see the Financial Aid feature on their springboard.

The following table contains the delivered roles and permission lists. You may use these as delivered or deploy security in the way that meets your institution’s requirements. The Campus Mobile application can be configured to use different permission lists if needed, see the Campus Mobile Implementation Guide, section 3.3.2.3.

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission List Description</th>
<th>Permission List</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Schedule</td>
<td>HCCPCSSA3010</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Class Search</td>
<td>HCCPCSSA3020</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Grades</td>
<td>HCCPCSSA3030</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Profile</td>
<td>HCCPCSSA3040</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Cart</td>
<td>HCCPCSSA3050</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Todo</td>
<td>HCCPCSSA3070</td>
</tr>
<tr>
<td>CS Mobile Student</td>
<td>CS Mobile – Holds</td>
<td>HCCPCSSA3080</td>
</tr>
</tbody>
</table>
Role | Permission List Description | LOV Code
--- | --- | ---
CS Mobile Applicant | CS Mobile – Applications | HCCPCSSA3100
CS Mobile Contributor | CS Mobile – Contributions | HCCPCSSA3090
CS Mobile Finances | CS Mobile – Finances | HCCPCSSA3060
CS Mobile Financial Aid | CS Mobile – Financial Aid | HCCPCSSA3110

Securing List of Values (LOV) Services

Campus Mobile makes extensive use of the LOV web services throughout the features of Campus Mobile. In order to limit the data that can be queried using the LOV service operations, there are delivered LOV configurations to enable web service access to the specific LOV data used in Campus Mobile. In the LOV setup all of the following use the ‘DEFAULT’ context except for the ‘SSC_SUBJECT_CLS’ noted with the (*) which uses the ‘CM’ context. This configuration is delivered as is provided here for informational purposes.

See "Setting Up List of Values" (PeopleSoft Campus Solutions 9.0: Campus Community)

<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACAD_PLAN_TBL</td>
<td>ACAD_CAREER</td>
<td>Class Search Term Selection - Career, Profile - Career</td>
</tr>
<tr>
<td>AID_YEAR_SRCH</td>
<td>AID_YEAR</td>
<td>Profile - Aid year</td>
</tr>
<tr>
<td>AV_INV_LOV_WRK</td>
<td>AV_SEQNO_LOV1</td>
<td>Contributions – Source</td>
</tr>
<tr>
<td>AV_INV_LOV_WRK</td>
<td>INTV_CD</td>
<td>Contributions – Campaigns</td>
</tr>
<tr>
<td>AV_INV_LOV_WRK</td>
<td>AV_MTVTN_LOV1</td>
<td>Contributions – Fund</td>
</tr>
<tr>
<td>AV_INV_LOV_WRK</td>
<td>INSTITUTION</td>
<td>Contributions – Institution</td>
</tr>
<tr>
<td>SSR_CLSSRCH_REQ</td>
<td>STRM</td>
<td>Class Search Term Selection, Profile</td>
</tr>
<tr>
<td>SSR_CLSSRCH_REQ</td>
<td>INSTRUCTION_MODE</td>
<td>Class Search filter - Instruction mode</td>
</tr>
<tr>
<td>SSR_CLSSRCH_REQ</td>
<td>INSTITUTION</td>
<td>Class Search Term Selection - Institution, Profile - Institution</td>
</tr>
<tr>
<td>SSR_CLSSRCH_REQ</td>
<td>CAMPUS</td>
<td>Class Search filter – Campus</td>
</tr>
<tr>
<td>SSR_LOV_WRK</td>
<td>ACAD_ORG1</td>
<td>Enrollment Options - To get the acad org to retrieve the instructors in edit class from cart use case</td>
</tr>
<tr>
<td>SSR_LOV_WRK</td>
<td>ACAD_PROG1</td>
<td>Enrollment Options - Acad Program Selection</td>
</tr>
<tr>
<td>SSR_LOV_WRK</td>
<td>SSR_INSTR_LOV10</td>
<td>Enrollment Options - Instructor Selection</td>
</tr>
</tbody>
</table>
Adding Security Access to the Campus Mobile Service Operations

In addition to feature-level access in Campus Mobile, users must be granted access to the web service operations that provide the data and business logic between Campus Mobile and Campus Solutions itself. A permission list must be defined that includes all of the necessary service operations to be deployed to users. That permission list must then be attached to a role assigned to Campus Mobile student users.

PeopleTools provides granular-level control to allow you to define relationships between permission lists and roles that best fit your institutional policies. You may want to encapsulate both feature-level access (see above) and web service-level access within a single permission list (such as HCCPCSSA3000), or you may want to define feature and web service access independently and pull them together within a single role. As long as users have access to both the Campus Mobile features and required service operations, Campus Mobile transactions will be available to them.
Follow these steps to add the permission list to each service operation listed in the Campus Mobile Service Operations table above:

2. Search each Service Operation Name listed in the Campus Mobile Service Operations tables.
3. On the General Tab, click the Service Operation Security link.
4. The Web Service Access page opens in a new window. On this page, select the appropriate permission list that you want to attach to this service operation.
5. Select *Full Access* from the Access drop-down list.
6. Click Save.

**Note:** As delivered, the service operations are configured to require basic authentication with the exception of: SCC_GET_LOV_R_POST, SSR_GET_CLASSES_R_POST, SSR_GET_CLASS_SECTION_R_POST, and SSR_GET_COURSE_OFFERING_R_POST. These service operations are set to require no authentication. This design is intended to support a future "public" unauthenticated role for class search. If these four services are set to require basic authentication, errors will occur in the Campus Mobile application. To check the status of a service operation's required authentication, navigate to the Service Operations Page, General tab. However, should your institution want to require basic authentication on these services, security can be enabled. First, follow the same steps above to enable security for these service operations; then, follow the instructions in the *Campus Mobile Implementation Guide* section "Securing Class Search Feature".
Setting Up Instructor Contact Info

Access the Instructor Contact Information page (Set Up SACR, Product Related, Campus Mobile, Instructor Contact Setup).

Image: Instructor Contact Setup page

This example illustrates the fields and controls on the Instructor Contact Setup page. You can find definitions for the fields and controls later on this page.

Campus Mobile includes the ability for a student to view information on instructors assigned to a class either in their Class Schedule or through Class Search. Details can include the contact information (address, phone number, email address, and photo) for instructors, if institutions have chosen to share those details.

Enable Instructor Contact Info Display

Click the check box to enable or disable the display of instructor contact info. Disabling instructor contact information prevents the web service from publishing any information. The Campus Mobile application will simply display the instructor name without any ability to drill down for additional contact information.

Address Type, Phone Type, and Email Type

Select the desired contact information source for each.

You are not required to map all three attributes to enable the instructor contact information. If no value is selected for a particular attribute (a <blank> option is provided), then no value passes to Campus Mobile for that attribute.
Note: To ensure that data for individuals covered under FERPA regulations (such as student instructors) is not released contrary to elected FERPA restrictions, the system queries the FERPA flag before sending information. If the FERPA flag is set to Yes/True, the system does not display data for that instructor, regardless of whether or not the data defined on this page corresponds to FERPA elections.

Note: The service operation must be secured such that only Campus Mobile can retrieve contact information values from the directory service. For more information on securing the service, refer to PeopleTools documentation.

See PeopleTools: Security Administration

Setting Up Finances

The service operations that deliver the financial information are dependent on settings on the General Options page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set). For your Institution Set, ensure that the Allow Use in Service check box is selected and you have entered a value in the Maximum Payments in Service field.

Setting Up Contributions

There are several areas of configuration needed to enable contributions along with the service operations described here. In the Campus Mobile Contributions feature, each institution that is configured for Involvement has a dynamic message associated with it that appears on the Contributions page. This message is set on the Involvement Setup page (Set Up SACR, Common Definitions, Self Service, Involvement, Involvement). You can change the Message field and it will dynamically update in Campus Mobile. For more information about involvement setup, see "Setting Up Self-Service Online Giving and Pledges" (PeopleSoft Campus Solutions 9.0: Contributor Relations).

In the Contributions feature, Make a Gift allows for direct integration with payment providers for credit card gifts. For this integration to work, you must configure the Hosted Payment Framework; see the ePayment Developer's Guide for instructions. Once the Hosted Payment merchant setup is complete, select the Hosted Payment to use with Contributions on the Business Unit CR component (Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Business Unit CR). For more information on CR business unit setup, see "Defining and Securing PeopleSoft Contributor Relations Business Units and SetIDs" (PeopleSoft Campus Solutions 9.0: Application Fundamentals).

Further, there is a required servlet that provides the integration between the Campus Mobile app and the third-party payment provider through the Hosted Payment Framework. See the Campus Mobile Implementation Guide posted to My Oracle Support, for instructions on configuring the servlet.

Setting Up Applications

The service operations that deliver the Applications information are dependent on display settings for Application Status, Checklist Item Due Dates and Checklist Contacts.

See Setting Up Application Status and Checklist Options
Customizing and Branding Campus Mobile

For more information on customizing the features of Campus Mobile, please see the *Campus Mobile Implementation Guide* posted to My Oracle Support. There you will find details around branding the application with your institution's logo and colors as well as icons and labels. Further, you will find information on the potential for customizing or extending the Campus Mobile application.

Deploying Campus Mobile

Campus Mobile can be deployed to both Android (.apk) and iOS (.ipa) devices. Campus Mobile is built on the Oracle ADF Mobile framework. You will open the Campus Mobile application archive in Oracle Jdeveloper, apply your branding, sign the application for your Institution and deploy it to Apple and Android application files to be distributed to your students. The *Campus Mobile Implementation Guide* contains details on deploying and distributing the Campus Mobile Application.

See *Campus Mobile Implementation Guide*, posted to My Oracle Support.

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**Defining and Setting Up Event Notifications for Campus Mobile**

This section provides overviews of setup for notifications and events as well as batch notifications, and it discusses how to:

- Perform general event setup.
- Perform general notification setup.
- Set up checklist events with notifications.
- Set up service indicator (SI) add events with notifications.
- Set up SI removed events with notifications.
- Set up enrollment appointment events with notifications.
- Create a job definition.
- Schedule jobs.
- Set up an events archive
- Set up push notifications.

**Understanding Notifications and Events**

Campus Solutions provides a notifications framework to trigger various streams of communication, called channels, based on underlying conditions (such as the posting of a final grade). Within the Campus Solutions Notification Framework, specific underlying conditions are defined as events. A single event, such as a final grade posting, can trigger multiple notification actions – for example, it may cause an email, an SMS message, and also a push notification to be sent to a user.

Campus Mobile delivers configurable artifacts that work with the Campus Solutions Notification Framework to capture events and publish messages through the email, SMS and push channels. An
activity stream showing recent events appears to the Campus Mobile user on a tab in the Landing Page. This tab, titled Notifications, has a badge reflecting the number of unread events in the list. Tapping the Notifications tab will display the events listing where the user can navigate to specific features in the context of the event. Tapping the back button will return the user to the list of events in the Notifications tab of the Landing Page.

**Defining and Setting Up Events for Campus Mobile**

As described above and in the “Using Campus Mobile” set of topics, starting with Campus Mobile Version 4, events are presented to the student through the Notifications tab in the Campus Mobile Landing Page. Follow this setup guide to present the student with an event feed in Campus Mobile, and to trigger subsequent notifications to students (as referenced in “Using Campus Mobile”) using SMS, Email, or Push.

**Understanding Batch Notifications Setup**

The Enrollment Appointment notification and notification of new or changed Holds or To Do List items requires you to set up a new batch notification job. To facilitate regular checking of these business process events, define new batch notification jobs using the Campus Solutions Notification Framework. In addition, you must associate each batch notification definition with a job definition and schedule it using the JobSet Definitions page in PeopleTools Process Scheduler.

The steps in this section outline the required setup needed for the following batch notification definitions:

- CheckListBatchSMS
- CheckListBatchEmail
- CheckListBatchPush
- SI_AddOrChangeBatchSMS
- SI_AddOrChangeBatchEmail
- SI_AddOrChangeBatchPush
- SI_DeleteBatchSMS
- SI_DeleteBatchEmail
- SI_DeleteBatchPush
- EnrollmentApptStatusBatchSMS
- EnrollmentApptStatusBatchEmail
- EnrollmentApptStatusBatchPush
Pages Used to Define and Set Up Event Notifications for Campus Mobile

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Setup</td>
<td>SCC_NTF_EVT_CFG</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, Event Setup</td>
<td>Configure the event and specify the notification consumers to track events and notifications.</td>
</tr>
<tr>
<td>Batch Notifications</td>
<td>SCC_BAT_NTF_RC</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, Batch Notifications</td>
<td>Define parameters such as selection criteria (using Population Selection) for recipients to be included in batch notification.</td>
</tr>
<tr>
<td>Push Notification Setup</td>
<td>SCC_NTF_PUSH_SETUP</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, Push Notification Setup</td>
<td>Configure the push notification setup for APNS and GCM.</td>
</tr>
<tr>
<td>Notification Setup</td>
<td>SCC_NTF_SETUP</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, Notification Setup</td>
<td>Activate notifications for Campus Mobile.</td>
</tr>
<tr>
<td>Notification Consumer Setup</td>
<td>SCC_NTF_CON_CFG</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, Notification Consumer Setup</td>
<td>Activate notification consumers.</td>
</tr>
<tr>
<td>SMS Notification</td>
<td>SCC_NTF_SMS</td>
<td>Set Up SACR, System Administration, Utilities, Notifications, SMS Notification Setup</td>
<td>Define connection details used for sending SMS messages.</td>
</tr>
</tbody>
</table>

Performing General Event Setup

The following service operations, handlers, and routings must be activated to enable Campus Mobile's use of events. These services populate the Notifications tab in the Landing Page. See the section “Activating Campus Mobile Service Operations, Handlers and Routing” for details on how to activate these service operations.

<table>
<thead>
<tr>
<th>Service Operation</th>
<th>Handler</th>
<th>Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC_NTF_PUBLISH_STDNT_ENRL</td>
<td>ONNOTIFY</td>
<td>SCC_NTF_PUBLISH_STDNT_ENRL</td>
</tr>
<tr>
<td>SCC_NTF_GET_EVENTS_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_NTF_GET_EVENTS_R_POST</td>
</tr>
<tr>
<td>SCC_NTF_UPDATE_EVENTS_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_NTF_UPDATE_EVENTS_R_POST</td>
</tr>
</tbody>
</table>

Activating Campus Mobile Events

Events are delivered as inactive and must be activated. To activate events:
1. Log into the PeopleSoft application in a browser.
2. Select Set Up SACR, System Administration, Utilities, Notifications, Event Setup.
3. Select each of the Event from the following list.
4. Select Active from the Status field drop-down list.
5. Save the page.

Event names:
- FINAL GRADE POSTED
- ENROLLED FROM WAITLIST
- CHECKLIST UPDATED BATCH
- SI_ASSIGNED BATCH
- SI_REMOVED BATCH
- ENROLLMENT APPT OPEN BATCH

Note: Over time, the Events table can grow and need to be archived. Campus Mobile only shows events from the past 7 days so it would be reasonable to run a weekly Event Archive job that would clean up any events prior to that 7-day mark. See the section “Events Archive Setup” to configure events archiving.

Performing General Notification Setup

Notifications, delivered in parallel with Campus Mobile, are described in the “Using Campus Mobile” documentation. As noted, notifications can be delivered to a student through three channels: SMS, email, or push notifications. This section describes the steps you will need to take to activate notifications for each channel.

Notification Service Operation Table

The following service operations, handlers, and routings must be activated to enable Campus Mobile’s use of the Notification Framework features. See the section “Activating Campus Mobile Service Operations, Handlers and Routing” for details on how to activate these service operations.

<table>
<thead>
<tr>
<th>Service Operation</th>
<th>Handler</th>
<th>Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC_PUSH_NOTIFICATIONS</td>
<td>NOTIFYHNDLR</td>
<td>SCC_PUSH_NOTIFICATIONS</td>
</tr>
<tr>
<td>SCC_DEVICE_REGISTER_POST</td>
<td>REQUESTHDLR</td>
<td>SCCDEVICE_REGISTER_POST</td>
</tr>
<tr>
<td>SCC_NTF_PUBLISH_STDNT_ENRL</td>
<td>ONNOTIFY</td>
<td>SCC_NTF_PUBLISH_STDNT_ENRL</td>
</tr>
<tr>
<td>SCC_NTF_GET_EVENTS_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_NTF_GET_EVENTS_R_POST</td>
</tr>
<tr>
<td>SCC_NTF_UPDATE_EVENTS_R_POST</td>
<td>REQUESTHDLR</td>
<td>SCC_NTF_UPDATE_EVENTS_R_POST</td>
</tr>
</tbody>
</table>
### Activating Campus Mobile Notification Templates

Notification templates for email, SMS, and push are delivered with a status of *Inactive*. To make use of Notifications functionality at the time of implementation, you need to set each of them to a status of *Active*. Note that the template names indicate their usage for SMS, email, or push so you can decide which ones to activate.

To activate Notification templates:

1. Log into the PeopleSoft application in a browser.
2. Select Set Up SACR, System Administration, Utilities, Notifications, Notification Setup.
3. Select each of the Notification templates from the following list.
4. Select *Active* from the Status field drop-down list.
5. Save the page.

**Notification Template Name:**

- GRADE_ADDED_EMAIL
- GRADE_ADDED_PUSH
- GRADE_ADDED_SMS
- GRADE_CHANGED_EMAIL
- GRADE_CHANGED_PUSH
- GRADE_CHANGED_SMS
- GRADE_REMOVED_EMAIL
- GRADE_REMOVED_PUSH
- GRADE_REMOVED_SMS
- WAITLIST_ENROLLED_EMAIL
- WAITLIST_ENROLLED_PUSH
- WAITLIST_ENROLLED_SMS
- CHECKLIST_UPDATED_EMAIL

---

<table>
<thead>
<tr>
<th>Service Operation</th>
<th>Handler</th>
<th>Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC_GCM_SEND_POST</td>
<td>--</td>
<td>SCC_GCM_SEND_POST</td>
</tr>
<tr>
<td>SCC_APNS_FEEDBACK</td>
<td>--</td>
<td>SCC_APNS_FEEDBACK</td>
</tr>
<tr>
<td>SCC_APNS_SEND</td>
<td>--</td>
<td>SCC_APNS_SEND</td>
</tr>
<tr>
<td>SCC_NTF_SMS_SRV</td>
<td>--</td>
<td>SCC_NTF_SMS_SRV</td>
</tr>
</tbody>
</table>
• CHECKLIST_UPDATED_PUSH
• CHECKLIST_UPDATED_SMS
• SI_ADDED_OR_CHANGED_EMAIL
• SI_ADDED_OR_CHANGED_PUSH
• SI_ADDED_OR_CHANGED_SMS
• SI_REMOVED_EMAIL
• SI_REMOVED_PUSH
• SI_REMOVED_SMS
• ENROLLMENT_APPT_OPEN_EMAIL
• ENROLLMENT_APPT_OPEN_PUSH
• ENROLLMENT_APPT_OPEN_SMS

Activating Campus Mobile Notification Consumers

Notification consumers for email, SMS, and push are delivered with a status of *Inactive*. In order to make use of Notifications functionality at the time of implementation, you need to set each of them to a status of *Active*. Similar to the templates, if you only intend to activate certain channels you do not need to activate every consumer. However, note that the single consumer "Campus Mobile" is required for all three channels (email, SMS, and push) to activate the checklist notifications, service indicator notifications, and enrollment appointment notifications.

To activate Notification consumers:

• Log into the PeopleSoft application in a browser.
• Select Set Up SACR, System Administration, Utilities, Notifications, Notification Consumer Setup.
• Select each of the Notification consumers from the following list.
• Select *Active* from the Status field drop-down list.
• Save the page.

Notification Consumer Name:

• FINAL_GRADE_POSTED
• ENROLLED_FROM_WAITLIST
• CHECKLIST_UPDATED_BATCH
• SI_ASSIGNED_BATCH
• SI_REMOVED_BATCH
• ENROLLMENT_APPT_OPEN_BATCH
Note: The Waitlist Notification requires a Wait List process: PSJob process SRWAITJB. Please see Student Records for more information on implementing this process.

Setting Up Checklist Events with Notifications

To set up checklist events with notifications:

1. Navigate to Set Up SACR, System Administration, Utilities, Notifications, Batch Notifications.
2. Add new Run Control ID (CHECKLIST_UPDATED_BATCH).
3. Configure the Checklist batch notification as follows:

   **Population Selection**
   2. Select *PS Query* as Selection Tool.
   3. Select *SCC_CHECKLIST* as Query Name.

   **Event Setup**
   Configure event setup so that Checklist Events will appear on the Notifications tab in the Campus Mobile Landing Page.
   1. Select *Enable Event Tracking*.
   2. Select *CHECKLIST_UPDATED* as the Event ID.
   3. Fill the Event Parameters Grid as follows:
      a. Map the User (%1) Bind variable to Checklist Descr.
      b. Enter *CHECKLIST_UPDATED* as the value for EVENT_TYPE.
      c. Enter *Checklist* as the value for GOTO.

   **Notification Consumers and Templates Setup**
   Configure notification consumers and templates to enable SMS, email, and Push notifications:
   1. Select *CHECKLIST_UPDATED* as Notification Consumer ID.
   2. Select the Enable for Batch check box.
   3. Configure the SMS notification template:
      a. Select *CHECKLIST_UPDATED_SMS* as Template Name.
      b. Select the Enable for Batch check box.
      c. Enter an optional Item Tag such as *CHECKLIST*.
      d. Select an optional Notification Importance value.
e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Checklist Name (%2) Bind Variable to CheckList Descr.

4. Configure the email notification template:
   a. Select `CHECKLIST_UPDATED_EMAIL` as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as `CHECKLIST`.
   d. Select an optional Notification Importance value.
   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Checklist Name (%2) Bind Variable to CheckList Descr.

5. Configure the push notification template:
   a. Select `CHECKLIST_UPDATED_PUSH` as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as `CHECKLIST`.
   d. Select an optional Notification Importance value.
   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Checklist Name (%2) Bind Variable to CheckList Descr; iii) Provide GOTO Key value as Checklist.

**Setting Up SI Add Events with Notifications**

To set up SI Add events with notifications:

1. Navigate to Set Up SACR, System Administration, Utilities, Notifications, Batch Notifications
2. Add new Run Control ID (SI_ASSIGNED_BATCH).
3. Set up the configuration as follows:

**Population Selection**

2. Select `PS Query` as Selection Tool.
3. Select `SCC_SI_ADD_OR_CHANGE` as Query Name.

**Event Setup**

Configure Event Setup so that SI add events will appear on the Notifications tab in the Campus Mobile Landing Page.
1. Select *Enable Event Tracking*.

2. Select *SERVICE_INDICATOR_ASSIGNED* as the Event ID.

3. Fill the Event Parameters Grid as follows:
   a. Enter *SERVICE_INDICATOR_ASSIGNED* as the value for EVENT_TYPE.
   b. Enter *Holds* as the value for GOTO.

### Notification Consumers and Templates Setup

Configure notification consumers and templates to enable SMS, email, and Push notifications:

1. Select *SERVICE_INDICATOR_ASSIGNED* as Notification Consumer ID.

2. Select the Enable for Batch check box.

3. Configure the SMS notification template:
   a. Select *SI_ADDED_OR_CHANGED_SMS* as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as *SERVICE_INDICATOR*.
   d. Select an optional Notification Importance value.
   e. In the notification parameters grid, map the User (%1) Bind variable to Name.

4. Configure the email notification template:
   a. Select *SI_ADDED_OR_CHANGED_EMAIL* as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as *SERVICE_INDICATOR*.
   d. Select an optional Notification Importance value.
   e. In the notification parameters grid, map the User (%1) Bind variable to Name.

5. Configure the push notification template:
   a. Select *SI_ADDED_OR_CHANGED_PUSH* as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as *SERVICE_INDICATOR*.
   d. Select an optional Notification Importance value.
   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Provide GOTO Key value as *Holds*. 
Setting Up SI Removed Events with Notifications

To set up SI Removed events with notifications:

1. Navigate to Set Up SACR, System Administration, Utilities, Notifications, Batch Notifications.
2. Add new Run Control ID (SI_REMOVED_BATCH).
3. Set up the configuration as follows:

**Population Selection**

2. Select *PS Query* as Selection Tool.
3. Select *SCC_SI_ADD_DELETE* as Query Name.

**Event Setup**

Configure Event Setup so that SI removed events will appear on the Notifications tab in the Campus Mobile Landing Page.

1. Select *Enable Event Tracking*.
2. Select *SERVICE_INDICATOR_REMOVED* as the Event ID.
3. Fill the Event Parameters Grid as follows:
   a. Enter *SERVICE_INDICATOR_REMOVED* as the value for EVENT_TYPE.
   b. Enter *Holds* as the value for GOTO.

**Notification Consumers and Templates Setup**

Configure notification consumers and templates to enable SMS, email, and Push notifications:

1. Select *SERVICE_INDICATOR_REMOVED* as Notification Consumer ID.
2. Select the Enable for Batch check box.
3. Configure the SMS notification template:
   a. Select *SI_REMOVED_SMS* as Template Name.
   b. Select the Enable for Batch check box.
   c. Enter an optional Item Tag such as *SERVICE_INDICATOR*.
   d. Select an optional Notification Importance value.
   e. In the notification parameters grid, map the User (%1) Bind variable to Name.
4. Configure the email notification template:
   a. Select *SI_REMOVED_EMAIL* as Template Name.
b. Select the Enable for Batch check box.

   c. Enter an optional Item Tag such as SERVICE_INDICATOR.

   d. Select an optional Notification Importance value.

   e. In the notification parameters grid, map the User (%1) Bind variable to Name.

5. Configure the push notification template:

   a. Select SI_REMOVED_PUSH as Template Name.

   b. Select the Enable for Batch check box.

   c. Enter an optional Item Tag such as SERVICE_INDICATOR.

   d. Select an optional Notification Importance value.

   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) ; Provide GOTO value as Holds Delete.

Setting Up Enrollment Appointment Events with Notifications

To set up enrollment appointment events with notifications:

1. Navigate to Set Up SACR, System Administration, Utilities, Notifications, Batch Notifications

2. Add new Run Control ID (ENROLLMENT_APPT_OPEN_BATCH).

3. Set up the configuration as follows:

   **Population Selection**

   1. Select an Academic Institution.

   2. Enable Population Selection.

   3. Select PS Query as Selection Tool.

   4. Select SCC_ENROLLMENT_APPOINTMENT as Query Name.

   **Event Setup**

   Configure Event Setup so that enrollment appointment events will appear on the Notifications tab in the Campus Mobile Landing Page.

   1. Select Enable Event Tracking.

   2. Select ENROLLMENT_APPT_OPEN as the Event ID.

   3. Fill the Event Parameters Grid as follows:

      a. Map the Appointment Number (%1) Bind variable to the Appointment Number field.
b. Map the Appointment Start Date (%2) Bind variable to the Appointment Start Date field.

c. Map the Appointment Start Time (%3) Bind variable to the Appointment Start Time field.

d. Map the INST Bind variable to the Institution field.

e. Map the Acad Career Bind variable to the Acad Career field.

f. Map the Term Bind variable to the Term field.

g. Enter ENROLLMENT_APPT_OPEN as the value for EVENT_TYPE.

h. Enter Cart as the value for GOTO.

Notification Consumers and Templates Setup

Configure notification consumers and templates to enable SMS, email, and Push notifications:

1. Select ENROLLMENT_APPT_OPEN as Notification Consumer ID.

2. Select the Enable for Batch check box.

3. Configure the SMS notification template:

   a. Select ENROLLMENT_APPT_OPEN_SMS as Template Name.

   b. Select the Enable for Batch check box.

   c. Enter an optional Item Tag such as ENROLLMENT_APPT_OPEN.

   d. Select an optional Notification Importance value.

   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Appointment Number (%2) Bind variable to the Appointment Number field; iii) Map the Appointment Start Date (%3) Bind variable to the Appointment Start Date field; iv) Map the Appointment Start Time (%4) Bind variable to the Appointment Start Time field.

4. Configure the email notification template:

   a. Select ENROLLMENT_APPT_OPEN_EMAIL as Template Name.

   b. Select the Enable for Batch check box.

   c. Enter an optional Item Tag such as ENROLLMENT_APPT_OPEN.

   d. Select an optional Notification Importance value.

   e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Appointment Number (%2) Bind variable to the Appointment Number field; iii) Map the Appointment Start Date (%3) Bind variable to the Appointment Start Date field; iv) Map the Appointment Start Time (%4) Bind variable to the Appointment Start Time field.

5. Configure the push notification template:
a. Select ENROLLMENT_APPT_OPEN_PUSH as Template Name.

b. Select the Enable for Batch check box.

c. Enter an optional Item Tag such as ENROLLMENT_APPT_OPEN.

d. Select an optional Notification Importance value.

e. Fill in the notification parameters grid as follows: i) Map the User (%1) Bind variable to Name; ii) Map the Appointment Number (%2) Bind variable to the Appointment Number field; iii) Map the Appointment Start Date (%3) Bind variable to the Appointment Start Date field; iv) Map the Appointment Start Time (%4) Bind variable to the Appointment Start Time field; v) Map the INST Bind variable to the Institution field; vi) Map the Term Bind variable to the Term field; vii) Map the Acad Career Bind variable to the Acad Career field; viii) Enter Cart as the value for GOTO.

Creating a Job Definition

After you create the batch notification definitions, you should create a job definition to control when the batch notification process will run. Depending on your requirements you can create a single job definition for all batch notifications, or create individual jobs for each batch notification.

Note: Batch processing is expected to occur once per day. In addition, the system sends notifications to students at the time it executes the batch process. In other words, batch processes that typically run in the middle of the night might result in students receiving SMS text messages on their phone during non-waking hours. You can create a single job definition that will be common for all batch notifications or, if needed, separate jobs for each batch process to schedule them in different recurrence definitions.

To create a job definition:

   a. Add a New Job (CL_SMS).
   b. Click the Job Definition Tab.
   c. Select a Process Category of Default.

2. Click the Job Definition Options tab.
   a. Provide the Recurrence name (Daily).
   b. Select a process Group of ALL PAGES.
   c. Select a Component of SCC_BAT_NTF_RC.

Scheduling Jobs

To schedule a job:
1. Access the JobSet Definitions page (PeopleTools, Process Scheduler, Schedule JobSet Definitions).

2. Add a new schedule as follows (for example, for checklist batch SMS):
   a. Set the Status to *Active*.
   b. Provide a Run Control ID (CheckListBatchSMS).
   c. Enter schedule and timing details as required for your installation, keeping in mind the following implications:
      - The system sends checklist notifications for checklists that are added or updated the day prior to the batch process execution.
      - The system sends SI notifications for changes occurring in the 24 hours prior to the batch process execution.
      - The system sends enrollment appointment notifications for appointments that will open the day after the batch process execution.
      - Executing the batch process more than once per day may lead to duplicate enrollment appointment notifications.
      - Executing the batch process less than once per day may lead to missed enrollment appointment notifications.
      - The system sends notifications to students at the time of batch process execution.

3. Click Save and run the schedule.

### Setting Up an Events Archive

Over time, the Events table can grow and need to be archived. Campus Mobile only shows events from the past 7 days so it would be reasonable to run a weekly Event Archive job that would clean up any events prior to that 7-day mark. The Events Archive process uses the Data Archive Manager and a delivered query.

### Test Running the Delivered PS Query

1. Navigate to Reporting Tools, Query, Query Manager.
2. Select Advanced Search.

   Change Query Type from *User* to *Archive*.
3. Click Search.
4. Select the Edit link for the *SCC_NFK_EVENT_ARCHIVE* query in the search list.
5. Click the Run tab.

   Enter appropriate values for input date, Read Events and Unread Events check boxes in the prompt table and click OK. The result set will show all the header rows that are eligible for archiving. The related child data would also be archived.
Create the Archive Process

1. Navigate to PeopleTools, Data Archive Manager, Archive Data to History.

2. Add a new archive run control ID (SCC_EVENT).

3. Fill in the following information:
   
   a. Select the SCC_ENFK Archive Template.
   
   b. Select Appropriate Process Selection Value:
      
      Selection – to copy rows from online (main) tables to history tables.
      
      Delete – to delete rows from online (main) tables.
      
      Remove from History – to delete rows from history tables.
      
      Rollback – to restore online(main) tables from history tables.
   
   c. Select Selective Query SCC_NFK_EVENT_ARCHIVE if process type is Selection; otherwise select Batch Number.
   
   d. Select Commit Processing as needed.

4. Select the Define Binds hyperlink to input or change archive query rule.

5. Select the Reset Query Bind Variables button.
   
   A prompt table appears that will accept the Archive Rule input date, Read Events, and Unread Events check boxes.

6. Click the Run button, and select the PSARCHIVE – Data Archive Manager Application Engine process.
   
   Run the process to success.

Check the Archive Audit

1. Navigate to PeopleTools, Data Archive Manager, Audit Archiving.

2. Select Archive ID SCC_ENFK.

3. Click Search to view the audit report for the archive process.

Setting Up Push Notifications

Please note that while email and SMS notifications do not require Campus Mobile, push notifications do require Campus Mobile. Oracle recommends that you set up push notifications to provide proactive information to the students who use the Campus Mobile app.

In addition to the steps already outlined in this topic for activating push notifications, you will need to enter the appropriate values in the Push Notification Setup page. The push notification setup section of Notification Framework documentation provides details on the setup of push notifications, including integration with the Apple and Google notification services, which are required to deliver push notifications.
See "Understanding the Notifications Framework" (PeopleSoft Campus Solutions 9.0: Campus Community).
Chapter 11

Using Self-Service Campus Personal Information

Understanding PeopleSoft Campus Self-Service Personal Information

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

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

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

The navigation tabs that are used in self-service personal information are defined on the Navigation Tabs Setup page.

Related Links
Setting Up Self-Service Navigation

Displaying and Accessing Self-Service Personal Data

The Personal Data Summary page contains links to self-service pages showing the individual's personal data. Optionally, you can also set the summary page to display the person's contact information and lists of holds and to do's for the student's convenient viewing and for any staff viewing data for that individual.

You can enter the label to use as the link for redirecting the user to the self-service page where the displayed address, phone number, or email address can be edited or updated. You can also set how many negative service indicators (holds) to display and how many pending checklist items (to do's) to display on the summary page.

This section describes how to:

• Set data to display on the Personal Data Summary page.
• Access personal data.
Pages Used to Display and Access Self-Service Personal Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Data Summary Options</td>
<td>SSS_PRSN_SUM_SETUP</td>
<td>Set Up SACR, Common Definitions, Self Service, Personal Data Summary Options</td>
<td>Optionally, set the types of addresses, phone number, and email address and the number of holds and to do's to display for an ID on the Personal Data Summary page.</td>
</tr>
<tr>
<td>Personal Data Summary</td>
<td>SSS_PRSNLDATA_SUMM</td>
<td>Self Service, Campus Personal Information, Personal Data Summary</td>
<td>View a summary of links to your personal data, and view a list of your holds and to do's.</td>
</tr>
</tbody>
</table>

Setting Data to Display on the Personal Data Summary Page

Access the Personal Data Summary Options page (Set Up SACR, Common Definitions, Self Service, Personal Data Summary Options).

Image: Personal Data Summary Options page

This example illustrates the fields and controls on the Personal Data Summary Options page. You can find definitions for the fields and controls later on this page.

The Personal Data Summary Options page contains links to self-service pages that show the individual's personal data. You can optionally set the individual's contact information and holds and to do's to display on the summary page.
Contact Information

You can select the type of contact information to display and enter the label to use as the link for redirecting the user to the self-service page where the address, phone number, or email address can be edited or updated.

If you do not use the U.S. Family Educational Rights and Privacy Act (FERPA) functionality, you can enter the URL to your institution's privacy site in the Privacy settings link field.

Holds and To Do List Sections

You can also specify how many negative service indicators (holds) and pending checklist items and tasks (to do's) to display for the person.

For more information on To Do List Section, see Setting Up a Self-Service Student Center.

Accessing Personal Data

Access the Personal Data Summary page (Self Service, Campus Personal Information, Personal Data Summary).

Image: Personal Data Summary page

This example illustrates the fields and controls on the Personal Data Summary page. You can find definitions for the fields and controls later on this page.

Options set on the Personal Data Summary Options page render the Contact Information, Holds, and To Dos data on the Personal Data Summary page. If the individual had negative service indicators assigned
or any pending checklists and tasks, the page would (according to the sample options page) also list the first 10 holds (service indicators) and all of the individual's pending checklist items and tasks.

For more information on To Do List, see Understanding Self-Service Student Center.

---

**Using Self-Service User Preferences**

User preferences enable self-service users to set default values for themselves to minimize the need for repetitive data entry. After they have been set, the default values remain associated with the user until changed or deleted. Self-service users can select their own user preferences or you can do it for them by using the User Profiles Management process to assign them the latest values corresponding to their profiles.

The User Preferences page displays the Share My Information link. A self-service user, for delegating the access of his or her data to another person, can click this link to navigate to the Share My Information - Summary self-service page.

See Creating a Proxy and Delegating Access.

**Related Links**

"Preparing for User Profiles Management" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)
"Setting Up User Profiles Management" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)

---

**Page Used for Self-Service User Preferences**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Preferences</td>
<td>SS_CC_USER_PREF</td>
<td>• Select the User Preferences link on the Personal Data Summary page</td>
<td>Enter default values for academic value and other elements required often by the system.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, User Preferences</td>
<td></td>
</tr>
</tbody>
</table>

---

**Using Self-Service Addresses, Names, Phones, and Demographic Data**

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

Addresses, names, phones, and demographic data are set up in the PeopleSoft Campus Solutions system. When you set up Personal Data Summary Options for PeopleSoft Campus Self Service, you can choose which address, phone, and email type to display by default on self-service pages. No additional setup is required.
Links under Campus Personal Information enable online self-service users to view, modify, or update their own:

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

Related Links
"Designing Campus Community" (PeopleSoft Campus Solutions 9.0: Campus Community)
"Setting Up Emergency Contacts Data" (PeopleSoft Campus Solutions 9.0: Campus Community)

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

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Addresses      | SS_ADDRESSES   | • Click the address link on the Personal Data Summary page. An address link is either or both of the labels entered for the Address Box 1 and Address Box 2 on the Personal Data Summary Options page  
• Self Service, Campus Personal Information, Addresses, Addresses | View your current address types as permitted by the Type Control page, and the associated address data. |
| Edit Address   | EO_ADDR_USA_SEC| • Click the edit button on the Addresses page.  
• Click the ADD A NEW ADDRESS button on the Addresses page.  
• Click the Edit Address link on the Emergency Contact Detail page. | When you access this page using the edit button on the Addresses page or the Edit Address link on the Emergency Contact Detail page, you can edit or update the address. When you access this page using the ADD A NEW ADDRESS button, you can add an address type and associated data for yourself to be effective now or on a future date. |
<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Address</td>
<td>SS_UPDATE_ADDRESS</td>
<td>Click the Delete (type) address link on the Addresses page. (Self-service users can edit only the home and mailing addresses, so no Delete button appears for these address types.)</td>
<td>Delete an address type and associated data.</td>
</tr>
<tr>
<td>Names</td>
<td>SS_CC_NAME</td>
<td>• Click the Names link on the Personal Data Summary page.</td>
<td>View your current name types as permitted by the Type Control page, and the associated name data.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Names, Names</td>
<td></td>
</tr>
<tr>
<td>Change Name</td>
<td>SS_CC_UPDATE_NAME</td>
<td>• Click the edit button on the Names page to access the Change Name page.</td>
<td>When accessed from the edit button, you can view or update the name type.</td>
</tr>
<tr>
<td>Add a new name</td>
<td></td>
<td>• Click the ADD A NEW NAME button on the Names page to access the Add a new name page.</td>
<td>When accessed from the ADD A NEW NAME button, you can add a name type and new name with a current for future effective date.</td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>SS_CC_PERS_PHONE</td>
<td>• Click the Contact Information Description link on the Personal Data Summary page.</td>
<td>View and update your current phone types as permitted by the Type Control page, and phone numbers.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the ADD A PHONE NUMBER button on the Emergency Contact Detail page, and then select the phone type to edit or delete.</td>
<td>Buttons on this page also enable you to add or delete rows to add or delete phone numbers.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Phone Numbers</td>
<td></td>
</tr>
<tr>
<td>Email Addresses</td>
<td>SS_CC_EMAIL_ADDR</td>
<td>• Click the Contact Information Email Address link on the Personal Data Summary page.</td>
<td>View and update your current email address types as permitted on the Type Control page, and email addresses.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Email Addresses</td>
<td>Buttons on this page also enable you to add or delete rows to add or delete email addresses.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Internet Addresses</td>
<td>SS_CC_INTERNET_ADR</td>
<td>• Click the Internet Addresses link on the Personal Data Summary page.</td>
<td>View and update internet addresses, including website and FTP site addresses. Buttons on this page also enable you to add or delete rows and to add or delete internet addresses.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Internet Addresses</td>
<td></td>
</tr>
<tr>
<td>Emergency Contacts</td>
<td>SS_CC_EMRG_CNTCT_L</td>
<td>• Click the Emergency Contacts link on the Personal Data Summary page.</td>
<td>View the name, address, and phone numbers for your emergency contact.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Emergency Contacts</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact Detail</td>
<td>SS_CC_EMRG_CNTCT_D</td>
<td>Click the ADD AN EMERGENCY CONTACT button on the Emergency Contact page.</td>
<td>Add an emergency contact for yourself, and enter the contact information.</td>
</tr>
<tr>
<td>Demographic Information</td>
<td>SS_CC_DEMOG_DATA</td>
<td>• Click the Demographic Data link on the Personal Data Summary page.</td>
<td>View a summary of your demographic data such as your date of birth, gender, marital status, national ID, and so on.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Demographic Information</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> If a photo is loaded into the system from the Photograph page in PeopleSoft Campus Solutions, that photo appears in the upper right on this page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>See &quot;Entering Photographs&quot; (PeopleSoft Campus Solutions 9.0: Campus Community).</td>
<td></td>
</tr>
<tr>
<td>FERPA Restrictions</td>
<td>SS_CC_FERPA_INQ</td>
<td>• Click the FERPA Restrictions link on the Personal Data Summary page.</td>
<td>View data that you have restricted from being released.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, FERPA Restrictions</td>
<td></td>
</tr>
<tr>
<td>Edit FERPA/Directory Restrictions</td>
<td>SS_CC_FERPA</td>
<td>Click the EDIT FERPA DIRECTORY RESTRICTIONS button on the FERPA Restrictions page.</td>
<td>Place restrictions to prevent the release of data about yourself.</td>
</tr>
</tbody>
</table>
### Using Self-Service Campus Personal Information

**Chapter 11**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release To Publication</td>
<td>INST_PUB_CATG_SEC2</td>
<td>Click the Release To Publication link on the Edit FERPA/Directory Restrictions page. (The link appears only when the Restrict check box is selected.)</td>
<td>Release restricted information for inclusion in specific internal directory publications.</td>
</tr>
</tbody>
</table>

#### Using Self-Service Personal Attributes Data

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

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

Self-services users can also set their notification preferences.

**Note:** Religious preference and decedent data personal attributes are not available from Campus Self Service. These are set up and maintained in PeopleSoft Campus Solutions only.

This section lists the pages used for self-service personal attributes.

#### Related Links

"Setting Up Personal Attributes" (PeopleSoft Campus Solutions 9.0: Campus Community)

#### Pages Used for Self-Service Personal Attributes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Languages</td>
<td>SS_CC_LANGUAGES_L</td>
<td>• Click the Languages link on the Personal Data Summary page.</td>
<td>View or edit a list of the languages that you read, write, or speak them.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Languages</td>
<td></td>
</tr>
</tbody>
</table>
## Entering Ethnicity Data

The appearance of this page changes, based on the settings defined on the Self Service Ethnicity Setup page. If the page is set up as display only, students and faculty are only able to see their ethnicity data on file in the system; they cannot add or update it through Campus Self Service.
Ethnicity questions are asked in two parts. First, self-service users may indicate whether they are or are not of Hispanic or Latino origin. Second, users may indicate their race. Users can click the Explain link to access the Self Service Help page that describes the way to answer the two questions, based on information from the NCES website: http://nces.ed.gov/statprog/2002/std1_5.asp

When a self-service user answers Question 1, the system inserts a value matching the Self Service Ethnicity Setup Answer Mapping for the respective answer into the Ethnicity records. When a self service user answers Question 2, the system inserts values matching the Self Service Ethnicity Setup Answer Mapping for the respective answers into the Ethnicity records. For example, if the user selects Asian and 'Asian' is the ethnic group mapped to that answer on the Self Service Ethnicity Setup Answer, a row for Asian will be inserted into the ethnicity tables.

The Background Information grid only appears if you have set it up in the Additional Background Information section of the Self Service Ethnicity Setup page.

When collecting additional background information, the values that you selected in the Answer Mapping section of the Self Service Ethnicity Setup do not appear in the Background prompt. The values that do appear have been selected in the Ethnic Groups to Display on the Self Service Ethnicity Group page and match the self-service user's answers to the questions. For example, when the user selects 'Yes, I am Hispanic or Latino' and also selects the American Indian or Alaska Native check box, only those active, current ethnic groups selected in Ethnic Groups to Display on the Self Service Ethnicity Setup that map to Hispanic or American Indian EEO Ethnic Groups will display in the Background prompt.

If the user answers 'No, I am not Hispanic' and does not answer the second question, the Background prompt displays all non-Hispanic ethnic groups selected in Ethnic Groups to Display on the Self Service Ethnicity Setup page. If the user then selects a Background value that maps to one of the five answers to Question 2, the related check box will be set when the Submit button is selected. Finally, users must click the The Information is correct as entered check box to confirm their selections and Submit their information. Even if users choose not to answer the questions, they will be prompted to select The Information correct as entered to indicate that they have reviewed the survey questions.

The IPEDS Ethnicity survey questions are optional. If a self-service user does not wish to divulge the information, they may simply leave the questions unanswered and select the The Information is correct as entered check box then select Submit.

A detailed technical red paper, including data examples, is available on Oracle's My Oracle Support website.


Using Self-Service Identification Data

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

Note: For security reasons, other identification data is either not available from Campus Self Service (external system ID and residency data) or is used as display-only (visa and passport data, driver's license information, or photos) These are set up and maintained in PeopleSoft Campus Solutions only. This section lists the page used for self-service identification data.
See "Understanding Personal Identification Data" (PeopleSoft Campus Solutions 9.0: Campus Community).

### Page Used for Self-Service Identification Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Identification Number</td>
<td>SS_CC_PIN</td>
<td>• Click the Personal Identification Number link on the Personal Data Summary page.</td>
<td>Create a personal identification number for yourself.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Personal Identification Number</td>
<td></td>
</tr>
</tbody>
</table>

### Using Self-Service Participation Data

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

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

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

This section lists the pages used for self-service participation data.

### Related Links

"Understanding Participation Data" (PeopleSoft Campus Solutions 9.0: Campus Community)

### Pages Used for Self-Service Participation Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>License and Certificates</td>
<td>SS_CC_LIC_CERT_L</td>
<td>• Click the Licenses/Certificates link on the Personal Data Summary page.</td>
<td>View a list of your licenses and certificates.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Licenses and Certificates</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>License/Certificate Detail</td>
<td>SS_CC_LIC_CERT_D</td>
<td>• Click the name of the license or certificate on the License and Certificates page to access a view-only version of the License/Certificate Detail page.</td>
<td>When you access this page from the name of the license or certificate, view details about that license or certificate.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the edit button on the License and Certificates page to access an updatable version of the License/Certificate Detail page.</td>
<td>When you access this page using the edit button, view or modify details about that license or certificate.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the ADD A LICENSE/CERTIFICATE button on the Licenses and Certificates page to access an enterable version of the License/Certificate Detail page.</td>
<td>When you access this page using the ADD A LICENSE/CERTIFICATE button, add another license or certificate to your list of licenses and certificates.</td>
</tr>
<tr>
<td>Memberships</td>
<td>SS_CC_MEMBER_L</td>
<td>• Click the Memberships link on the Personal Data Summary page.</td>
<td>View a list of your memberships.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Memberships</td>
<td></td>
</tr>
<tr>
<td>Membership Detail</td>
<td>SS_CC_MEMBER_D</td>
<td>• Click the name of the membership on the Memberships page to access a view-only version of the Membership Detail page.</td>
<td>When you access this from the name of the membership, view details about that membership.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the edit button on the Memberships page to access an updatable version of the Membership Detail page.</td>
<td>When you access this page using the edit button, view or modify details about that membership.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the ADD A MEMBERSHIP button on the Memberships page to access an enterable version of the Membership Detail page.</td>
<td>When you access this page using the ADD A MEMBERSHIP button, add another membership to your list of memberships.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Extracurricular Activities | SS_CC_EXTRACUR_ACT       | • Click the Extracurricular Activities link on the Personal Data Summary page.  
• Self Service, Campus Personal Information, Extracurricular Activities | View a list of your extracurricular activities.  
|                       |                          |                                                                                       | **Note:** Self-service users can view extracurricular activities information, but they cannot enter, modify, or update it. |
| Honors and Awards    | SS_CC_HONOR_AWARD        | • Click the Honors/Awards link on the Personal Data Summary page.  
• Self Service, Campus Personal Information, Honors and Awards | View a list of your academic honors and awards.  
|                       |                          |                                                                                       | **Note:** Self service users can view academic honors and awards information, but they cannot enter, modify, or update it. |
| Publications         | SS_CC_PUB_L              | • Click the Publications link on the Personal Data Summary page.  
• Self Service, Campus Personal Information, Publications | View a list of your publications. |
| Publication Detail   | SS_CC_PUB_D              | • Click the name of the publication on the Publications page to access a view-only version of the Membership Detail page.  
• Click the edit button on the Publications page to access an editable version of the Membership Detail page.  
• Click the ADD PUBLICATION button on the Publications page to access an enterable version of the Membership Detail page. | When you access this page from the name of the publication, view details of that publication.  
When you access this page using the edit button, view and modify details of that publication.  
When you access this page using the ADD PUBLICATION button, add a publication to your list of publications. |

**Entering Other Self-Service Biographical Data**

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

This section lists the pages used to enter other self-service biological data.
### Pages Used to Enter Other Self-Service Biographical Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Experience</td>
<td>SS_CC_WORK_EXP_A</td>
<td>• Click the Work Experience link on the Personal Data Summary page.</td>
<td>View a list of your work experience.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Campus Personal Information, Work Experience</td>
<td></td>
</tr>
<tr>
<td>Employment Details</td>
<td>SS_CC_WORK_EXP</td>
<td>• Click the name of the work experience on the Work Experience page to access a view-only version of the Employment Details page.</td>
<td>When you access this page from the name of the work experience, view details of that work experience.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the edit button on the Work Experience page to access an updatable version of the Employment Detail page.</td>
<td>When you access this page using the edit button, view and modify details of that work experience.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the ADD A WORK EXPERIENCE button on the Work Experience page to access an enterable version of the Employment Details page.</td>
<td>When you access this page using the ADD A WORK EXPERIENCE button, add a work experience to your list of work experiences</td>
</tr>
</tbody>
</table>

### Using Self-Service Service Indicators Data

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

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

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

Service indicators are set up in PeopleSoft Campus Solutions. When you define a service indicator in Campus Solutions, you can choose whether to display the indicator (as a hold) on self service pages for all IDs to which the indicator is assigned. When you set up Personal Data Summary Options for Campus Self Service, you can choose how many holds to display and whether to display their monetary value, if any. No other setup is required.

This section lists the pages used for self-service service indicators data.
Related Links

"Understanding Service Indicator Setup" (PeopleSoft Campus Solutions 9.0: Campus Community)
"Understanding Service Indicators" (PeopleSoft Campus Solutions 9.0: Campus Community)

Pages Used for Self-Service Service Indicators Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Holds</td>
<td>SS_CC_HOLDDS</td>
<td>Self Service, Campus Personal Information, Holds</td>
<td>View holds placed on services for yourself and determine how and when to resolve them.</td>
</tr>
</tbody>
</table>
| Hold Item        | SS_CC_HOLD_SEC  | • Click the name of the hold item in the Holds box on the Personal Data Summary page  
• Click the name of the hold item on the Your Holds page. | View information about a specific hold and determine how to resolve it and whom to contact |

Using Self-Service Checklists Data

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

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

Checklists are set up in PeopleSoft Campus Solutions. When you set up Personal Data Summary Options for Campus Self Service, you can choose how many to-do items to display. No additional setup is required for self service.

This section lists the pages used for self-service checklists data.

Related Links

"Understanding Checklist Setup" (PeopleSoft Campus Solutions 9.0: Campus Community)
"Understanding Checklists" (PeopleSoft Campus Solutions 9.0: Campus Community)
### Pages Used for Self-Service Checklists Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Do List</td>
<td>SS_CC_TODOS</td>
<td>Self Service, Campus Personal Information, To Do List</td>
<td>View your pending checklist items and determine what to do to satisfy the requirements. Also, view the pending tasks (activity guide instances) on this page. Click the name of the task to access the Student Task WorkCenter for the task. For information on Student Task WorkCenter: See <a href="#">Understanding Student Activity Guides</a>.</td>
</tr>
<tr>
<td>To Do Item</td>
<td>SS_CC_TODOS_SEC</td>
<td>• Click the name of the To Do item in the To Do List box on the Personal Data Summary page • Click the name of the To Do Item on the To Do List page.</td>
<td>View information about a specific checklist item and determine what is required and whom to contact.</td>
</tr>
</tbody>
</table>
Chapter 12

Using Self-Service Student Recruiting

Using Self-Service Student Recruiting for Recruiting and Admissions

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

This section lists prerequisites and lists the pages used for self-service student recruiting.

Prerequisites

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants who 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 for Self-Service Student Recruiting for Recruiting and Admissions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prospects by Category - Select Search Criteria</td>
<td>SS_ADM_PRS_REQ_CAT</td>
<td>Self Service, Student Recruiting, View Prospects by Category</td>
<td>Recruiting officers use this page to search for prospects by category.</td>
</tr>
<tr>
<td>Prospects by Category - Search Results</td>
<td>SS_ADM_PRS_SUM_CAT</td>
<td>Click the Search button on the Prospects by Category - Select Search Criteria page.</td>
<td>Recruiting officers use this page to view prospect search results.</td>
</tr>
<tr>
<td>Prospect Programs</td>
<td>ADM_PRSPCT_P_SEC</td>
<td>Click the Program Detail link on any of the prospect search results pages.</td>
<td>Recruiting officers use this page to view program details for a prospect.</td>
</tr>
<tr>
<td>Prospects by Organization - Select Search Criteria</td>
<td>SS_ADM_PRS_REQ_ORG</td>
<td>Self Service, Student Recruiting, View Prospects by Organization</td>
<td>Recruiting officers use this page to search for prospects by organization.</td>
</tr>
<tr>
<td>Prospects by Organization - Search Results</td>
<td>SS_ADM_PRS_SUM_ORG</td>
<td>Click the Search button on the Prospects by Organization - Select Search Criteria page.</td>
<td>Recruiting officers use this page to view prospect search results.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organization Primary Location</td>
<td>EXT_ORG_LOC</td>
<td>Click the Org Primary Location link on the Prospects by Organization - Search Results page.</td>
<td>Recruiting officers use this page to view the organization's primary address.</td>
</tr>
<tr>
<td>Prospects by Region - Select Search Criteria</td>
<td>SS_ADM_PRS_REQ_REG</td>
<td>• Outreach, Recruiting Officer, Home, Recruiting, By Region</td>
<td>Recruiting officers use this page to search for prospects by region.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Student Recruiting, View Prospects By Region</td>
<td></td>
</tr>
<tr>
<td>Prospects by Region - Search Results</td>
<td>SS_ADM_PRS_SUM_REG</td>
<td>Click the Search button on the Prospects by Region - Select Search Criteria page.</td>
<td>Recruiting officers use this page to view prospect search results.</td>
</tr>
<tr>
<td>Applicants by Category - Select Search Criteria</td>
<td>SS_ADM_APP_REQ_CAT</td>
<td>• Outreach, Recruiting Officer, Home, Recruiting, By Category</td>
<td>Recruiting officers use this page to search for applicants by category.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Student Recruiting, View Applicants By Category</td>
<td></td>
</tr>
<tr>
<td>Applicants by Category - Search Results</td>
<td>SS_ADM_APP_SUM_CAT</td>
<td>Click the Search button on the Applicants by Category - Select Search Criteria page.</td>
<td>Recruiting officers use this page to view applicant search results.</td>
</tr>
<tr>
<td>Applicants by Category - Program Detail</td>
<td>SS_ADM_APPL_PROG_C</td>
<td>Click the Program Detail link on any of the applicant search results pages.</td>
<td>Recruiting officers use this page to view program details for an applicant.</td>
</tr>
<tr>
<td>Applicants by Category - Application Status</td>
<td>SS_ADM_APP_ST_CAT</td>
<td>Click the Application Status link on the Applicants by Category – Program Detail page.</td>
<td>Recruiting officers use this page to view a person's application status.</td>
</tr>
<tr>
<td>Applicants by Organization - Select Search Criteria</td>
<td>SS_ADM_APP_REQ_ORG</td>
<td>Self Service, Student Recruiting, View Prospects by Category, View Applicants By Org</td>
<td>Recruiting officers use this page to search for applicants by organization.</td>
</tr>
<tr>
<td>Applicants by Organization - Search Results</td>
<td>SS_ADM_APP_SUM_ORG</td>
<td>Click the Search button on the Applicants by Organization - Select Search Criteria page.</td>
<td>Recruiting officers use this page to view applicant search results.</td>
</tr>
<tr>
<td>Applicants by Region - Select Search Criteria</td>
<td>SS_ADM_APP_REQ_REG</td>
<td>Self Service, Student Recruiting, View Applicants By Region</td>
<td>Recruiting officers use this page to search for applicants by region.</td>
</tr>
<tr>
<td>Applicants by Region - Search Results</td>
<td>SS_ADM_APP_SUM_REG</td>
<td>Click the Search button on the Applicants by Region – Select Search Criteria page.</td>
<td>Recruiting officers use this page to view applicant search results.</td>
</tr>
</tbody>
</table>
Chapter 13

Using Self-Service Student Admissions

Requesting Information

Visitors can request information from your institution through PeopleSoft Campus Self Service.

Understanding Self-Service Request Information

Campus Self Service enables you to capture prospect data over the internet. When visitors to your website request admissions information, they can enter information about themselves that the system converts to prospect data. For example, they can enter academic interests, test scores, academic program information, and more. The system takes this information and creates a prospect record. To request admissions information, a visitor must have a user ID and password.

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

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

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

Related Links

Understanding Self-Service Request Information
Setting Up Self-Service Request Information
Pages Used to Request Information

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Admission Materials</td>
<td>ADM_WEB_PRS_INTRO</td>
<td>• Self Service, Student Admission, Request Information</td>
<td>Visitors view introductory text about requesting admission materials, such as how to move from page to page and how to prompt for values.</td>
</tr>
<tr>
<td>Request Information</td>
<td>ADM_WEB_PRS_CAR</td>
<td>Click the Next button on the Request Admission Materials page.</td>
<td>Visitors add, delete, or edit the academic careers for which they want to request information. Note: Only academic programs, plans, and subplans with a Last Prospect Date greater than the system date or blank are available.</td>
</tr>
<tr>
<td>Request Information—I am</td>
<td>ADM_WEB_PRS_CAR_SP</td>
<td>Click the Add button on the Request Information page.</td>
<td>Visitors enter academic career, academic information, school information, and academic program information, depending on your setup in the Web Prospect Setup page.</td>
</tr>
<tr>
<td>interested in Attending</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Interests</td>
<td>ADM_WEB_PRS_INT</td>
<td>Click the Next button on the Request Information page.</td>
<td>Visitors can select their academic interests. This page appears to visitors if you enable this segment on the Web Prospect Setup page.</td>
</tr>
<tr>
<td>Test Results</td>
<td>ADM_WEB_PRS_TST</td>
<td>Click the Next button on the Academic Interests page.</td>
<td>Visitors can enter test results. This page appears to visitors if you enable this segment on the Web Prospect Setup page.</td>
</tr>
<tr>
<td>Test Results</td>
<td>ADM_WEB_PRS_TST_SP</td>
<td>Click the Add button on the Test Results page.</td>
<td>Visitors add test details, such as test name, scores, percentiles, and dates.</td>
</tr>
<tr>
<td>Submit</td>
<td>ADM_WEB_PRS_SUB</td>
<td>Click the Next button on the Test Results page.</td>
<td>Visitors submit the request.</td>
</tr>
<tr>
<td>Your request for information</td>
<td>ADM_WEB_PRS_END</td>
<td>Click the Submit button on the Submit page.</td>
<td>Visitors view a message confirming that their request was successfully submitted.</td>
</tr>
<tr>
<td>has been processed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Accepting or Declining Admission

Applicants can view their application status and accept or decline admission using self-service pages.
You can edit the text messages on both the Accept Admission self-service page and the Decline Admission self-service page. These messages are in the message catalog under the message set number 14200.

If the applicant accepts admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Intention to Matriculate*. The system sets the effective date to the day the student accepts admission.

If the student declines admission, the system inserts an effective-dated row on the Application Program Data page with a program action of *Applicant Withdrawal*. The system sets the effective date to the day the student declines admission.

Additionally, any data that is provided about the school that the student is going to attend and why they choose that institution over this one is inserted on the Application Student Response page. Each of the pages above is within the Maintain Applications component.

### Pages Used to Accept or Decline Admission

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept Admission</td>
<td>SS_ADM_ACCEPT</td>
<td>• Self Service, Student Admission</td>
<td>This page appears if the applicant has no application to accept or decline.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Admissions</td>
<td></td>
</tr>
<tr>
<td>Accept Admissions–Select Application</td>
<td>SS_ADM_ACCEPT2</td>
<td>• Self Service, Student Admission</td>
<td>Applicants can select the application that they want to accept or decline. If an applicant was admitted to multiple academic careers or academic programs, each application will appear on this page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Admissions</td>
<td></td>
</tr>
<tr>
<td>Accept or Decline Admission</td>
<td>SS_ADM_ACC_DEC</td>
<td>Click the Accept/Decline link for the application that you want to process.</td>
<td>Applicants select whether they want to accept or decline admission.</td>
</tr>
<tr>
<td>Confirm Acceptance</td>
<td>SS_ADM_ACCEPT3</td>
<td>Click the I Accept Admission button on the Accept or Decline Admission page.</td>
<td>Applicants can confirm their acceptance.</td>
</tr>
<tr>
<td>Admittance Accepted!</td>
<td>SS_ADM_ACCEPT4</td>
<td>Click the Confirm Acceptance button on the Confirm Acceptance page.</td>
<td>This page appears to show that the applicant's selection has been processed.</td>
</tr>
<tr>
<td>Confirm Decline</td>
<td>SS_ADM_DECLINE1</td>
<td>Click the I Decline Admission button on the Accept or Decline Admission page.</td>
<td>Applicants can confirm that they want to decline admission.</td>
</tr>
</tbody>
</table>
Viewing Application Status

This section discusses how applicants view their application status through Campus Self Service.

Pages Used View Application Status

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Status</td>
<td>SS_ADM_APP_STATUS</td>
<td>• Self Service, Student Admission&lt;br&gt;• Self Service, Admissions&lt;br&gt;• Self Service, Student Center.In the Admissions section (My Applications region) of Student Center, click View Status.</td>
<td>Applicants can view the status of their applications.</td>
</tr>
</tbody>
</table>

Viewing Application Status

Application status is based on the Complete check box of the Application Data page (Student Admissions, Application Maintenance, Maintain Applications, Application Data). If the Complete check box is selected, the status will show Complete. If the check box is not selected, the status will show Incomplete. This check box setting can be updated manually or by using the Population Update process for ADM_APPL_DATA.

Also, if one or all checklists assigned to this application are incomplete, the Show outstanding items for this application button appears. Applicants can click this button to view their outstanding items that must be received for the application to be processed and/or finalized. The display of the application status, checklist item due date and checklist contact is based on the Applicant Status Options page for the
institution and career assigned to the application. For more information, see Setting Up Application Status and Checklist Options.
Understanding Self-Service Student Center

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

From the Student Center, students access any student related transaction that is available from Campus Self Service. You can use the Student Center Options page and security setup to control which sections and transactions appear on the Student Center.

The sections that the Student Center can display are:

- **Academics**
  Provides links to enrollment and academic records self-service transactions. Also displays the student's schedule, which displays the classes, in any career, in which the student is registered for the current term, as of today's date. If there are no such classes, the system looks at the next term in which the student is term activated for classes to display. In addition, provides a link to the Enrollment Shopping Cart, where students can search for and temporarily save classes for a future term, until that term's enrollment period.

- **Finances**
  Provides links to PeopleSoft Student Financials self-service transactions and displays account summary information.

- **Personal Information**
  Provides links to PeopleSoft Campus Community self-service transactions and displays contact information.

- **Admissions**
  Provides links to PeopleSoft Recruiting and Admissions self-service transactions.

- **Holds**
  Provides a list of hold items. Students can click the Details link to access the Holds self-service application page for more information.

- **To Do List**
  Provides a list of to do items. These to do items are pending checklist items or tasks (activity guide instances). The task link opens up the Student Task WorkCenter for the task. The checklist item link opens up the To Do Item Detail page for the checklist item. Students can click the More link to access the To Do List self-service page for more information.
For information on Student Task WorkCenter, see Understanding Student Activity Guides.

- Milestones

  Provides a list of student milestones. Students can click the Details link to access the Student Milestone Details self-service page for more information.

- Enrollment Dates

  Provides a list of enrollment dates. Students can click the Details link to access the Enrollment Dates self-service application page for more information.

- Advisor

  Provides advisor information. Students can click the Details link to access the View My Advisor self-service application page for more information.

- Related Links

  Displays the links that you define on the Student Center Options page.

The Student Center displays the Share My Information button. A student, for delegating the access of his or her data to another person, can click this button to navigate to the Share My Information - Summary self-service page.

See Accessing Delegated Transactions.

Note: Students who use pop-up blocker software in their browsers will be unable to view .PDF transcripts and many other request results in Student Center.

Related Links
Setting Up a Self-Service Student Center

Using Self-Service Student Center

Students can use the self-service Student Center.

Page Used to Use Self-Service Student Center

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Center</td>
<td>SSS_STUDENT_CENTER</td>
<td>Self Service, Student Center</td>
<td>Students use this page to access student related transactions and to view important information, such as class schedule, dates, and account information.</td>
</tr>
</tbody>
</table>
Chapter 15

Using Faculty Center

Understanding the Self-Service Faculty Center

The Faculty Center is a self-service component that provides instructors with the ability to:

• View their teaching schedule.
• View their exam schedule.
• View their textbook summary.
• View their grade rosters, enter grades, and post grades.
• View their class rosters.
• Access your Learning Management System.
• Access the Gradebook and class assignments, if your institution has licensed PeopleSoft Gradebook.
• Link to personal data summary.

Depending on security, instructors can also:

• Search for classes and browse the course catalog.
• Locate a faculty member.
• Access your Learning Management System.
• Access the Advisor Center.

Related Links
"Setting Up the Student Services Center Component" (PeopleSoft Campus Solutions 9.0: Campus Community)
Searching for Classes Using Self-Service Pages
Prerequisites for Using Academic Advisement Self Service
"Understanding Gradebook" (PeopleSoft Campus Solutions 9.0: Gradebook)

Using the Self-Service Faculty Center

Instructors can use the self-service Faculty Center. Access is available through standard menu navigation as well as through icons and subtabs within the Faculty Center.
# Pages Used for the Self-Service Faculty Center

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Schedule</td>
<td>INSTR_CLASS3</td>
<td>Self Service, Faculty Center, My Schedule</td>
<td>Instructors use this page to access instructor-related transactions and to view their teaching and exam schedules. Instructors see only those terms for which they are assigned as the instructor.</td>
</tr>
<tr>
<td>Class Detail</td>
<td>SSR_CLSRCH_DTL</td>
<td>Click a class link within My Teaching Schedule on the My Schedule page.</td>
<td>Instructors can view the details of the classes in their schedules.</td>
</tr>
<tr>
<td>Textbook Summary</td>
<td>SSR_SSCLSTXB_SUM</td>
<td>Click the View Textbook Summary link of the Faculty Center, My Schedule page.</td>
<td>Instructors can view textbook assignments for each of their classes. The link is available if you select the Display Textbook Summary link – Instructor Self Service check box on the Other page in the Student Records setup component (SSR_SS_ENRL_OPT).</td>
</tr>
<tr>
<td>View My Weekly Schedule</td>
<td>SSR_SSINSTR_WEEK</td>
<td>Click the View Weekly Teaching Schedule link on the My Schedule page.</td>
<td>Instructors can view their weekly teaching and exam schedules in a grid format.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Weekly Exam Schedule link on the My Schedule page.</td>
<td></td>
</tr>
<tr>
<td>Personal Data Summary</td>
<td>SSS_PRSNLDATA_SUMM</td>
<td>Click the View Personal Data Summary link on the My Schedule page.</td>
<td>Instructors can view a summary of links to their personal data.</td>
</tr>
<tr>
<td>Class Roster</td>
<td>SS_FAC_CLASS_ROST</td>
<td>• Self Service, Faculty Center, Class Roster</td>
<td>Instructors view the students who are enrolled in a class, have dropped a class, or are on the waitlist for a class. Instructors can send email notifications to selected students or all students in the class. Instructors have the option to display student photos on the class roster.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Faculty Center, My Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Class Roster icon on the My Schedule page or click the Class Roster subtab.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Grade Roster</td>
<td>SS_GRADE_ROSTER</td>
<td>• Self Service, Faculty Center, Grade Roster</td>
<td>Instructors view or enter grades, update the roster's approval status, and post grades.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Faculty Center, My Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Grade Roster icon on the My Schedule page or click the Grade Roster subtab.</td>
<td></td>
</tr>
<tr>
<td>Gradebook</td>
<td>LAM_CLASS_GRADES</td>
<td>• Self Service, Faculty Center, Gradebook</td>
<td>Enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Faculty Center, My Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Gradebook icon on the My Schedule page or click the Gradebook subtab.</td>
<td></td>
</tr>
<tr>
<td>Class Assignments</td>
<td>LAM_CLASS_ACTIVITY</td>
<td>• Self Service, Faculty Center, Assignments</td>
<td>Create, review or edit Gradebook class assignments.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Faculty Center, My Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Assignments icon on the My Schedule page or click the Assignments subtab.</td>
<td></td>
</tr>
<tr>
<td>My Advisees</td>
<td>SSS_ADVISEE_LIST</td>
<td>Self Service, Advisor Center, My Advisees</td>
<td>Advisors can view their advisees, display advisee photos, and link advisee student details. Details include a variety of data such as a view of the advisee's student center, shopping cart, planner, academic requirements, general information, and academic history.</td>
</tr>
<tr>
<td>Advisee Student Center</td>
<td>SSS_STUDENT_CENTER</td>
<td>• Self Service, Advisor Center, Advisee Student Center</td>
<td>Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Advisor Center, My Advisees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click View Student Details on the My Advisees page for an advisee or click the Student Center subtab.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Advisee General Info</td>
<td>SCC_SUM_PERSONAL</td>
<td>• Self Service, Advisor Center, Advisee General Info&lt;br&gt;• Self Service, Advisor Center, My Advisees&lt;br&gt;Click View Student Details for an advisee on the My Advisees page.&lt;br&gt;Click the General Info subtab.</td>
<td>Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.</td>
</tr>
<tr>
<td>Advisee Transfer Credit</td>
<td>SCC_SUM_TRNSFRCRDT</td>
<td>• Self Service, Advisor Center, Advisee Transfer Credit&lt;br&gt;• Self Service, Advisor Center, My Advisees&lt;br&gt;Click View Student Details on the My Advisees page for an advisee.&lt;br&gt;Click the Transfer Credit subtab.</td>
<td>Advisors can view information such an advisees's course and test credits.</td>
</tr>
<tr>
<td>Advisee Academics</td>
<td>SCC_SUM_ACADEMICS</td>
<td>• Self Service, Advisor Center, Advisee Transfer Credit&lt;br&gt;• Self Service, Advisor Center, My Advisees&lt;br&gt;Click View Student Details on the My Advisees page for an advisee.&lt;br&gt;Click the Academics subtab.</td>
<td>Advisors can view information such as an advisee's career, program, and term summary.</td>
</tr>
<tr>
<td>Search for Classes</td>
<td>SSR_CLSRCH_ENTRY</td>
<td>Self Service, Search, Class Search</td>
<td>Instructors can search for classes.</td>
</tr>
<tr>
<td>Browse Course Catalog</td>
<td>SSS_BROWSE_CATLG</td>
<td>Self Service, Search, Browse Course Catalog</td>
<td>Instructors can browse the course catalog to see a list of courses offered at the institution.</td>
</tr>
<tr>
<td>Faculty Search</td>
<td>SSR_FIND_INSTR</td>
<td>Search, Faculty Search</td>
<td>Instructors can locate the teaching schedule for another instructor. If available, after the instructor's teaching schedule is displayed, click on the instructor's name to send an email.</td>
</tr>
</tbody>
</table>
Related Links
Prerequisites for Using Academic Advisement Self Service
Viewing Advisee Information Through Self-Service Pages

**Entering Grades Through Self-Service**

This section lists prerequisites and discusses how instructors enter grades through self service.

**Prerequisites**

For instructors to access their midterm and final grade rosters, you must:

- Generate the rosters.
- Assign the instructors to classes.
- Give the assigned instructors appropriate grade roster access of Grade, Approve, or Post.

**Pages Used to Enter Grades Through Self Service**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Roster</td>
<td>SS_GRADE_ROSTER</td>
<td>Self Service, Faculty Center, Grade Roster</td>
<td>Instructors view or enter grades, update the roster's approval status, and post grades.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Self Service, Faculty Center, My Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Grade Roster icon on the My Schedule page or the Grade Roster subtab.</td>
<td></td>
</tr>
<tr>
<td>Grade Change Request</td>
<td>SS_GRADE_CHANGE</td>
<td>Click the Grade Change Request link on the self-service Grade Roster page.</td>
<td>Instructors submit grade change requests. This link appears after grades are posted.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>----------</td>
<td>----------------</td>
<td>------------</td>
<td>-------</td>
</tr>
<tr>
<td>Send Notification</td>
<td>SSS_NOTIFY</td>
<td>Click the Notify Selected Students or Notify All Students link on the Self-Service Grade Roster page.</td>
<td>Instructors send email notifications to selected students or all students in a class. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.</td>
</tr>
<tr>
<td>Students Without Email Address</td>
<td>SSR_NO_EMAIL</td>
<td>This page appears when you click the Notify All Students link and students are on the grade roster who do not have email addresses in the system.</td>
<td>Instructors view the students on the grade roster who do not have email addresses.</td>
</tr>
<tr>
<td>Transcript Note</td>
<td>GRADE_ROSTER_NOTE</td>
<td>Click the Note link on the Transcript Notes tab of the self-service Grade Roster page.</td>
<td>Instructors can add a transcript note to a student's transcript.</td>
</tr>
<tr>
<td>Printer Friendly Version</td>
<td>SS_GRADE_RSTR_PRT</td>
<td>Click the Printer Friendly Version link from the Self Service Grade Roster page.</td>
<td>Displays a printer friendly version of the grade roster.</td>
</tr>
</tbody>
</table>

**Entering Grades Through Self Service**

Access the Grade Roster page (Self Service, Faculty Center Click the Grade Roster icon on the Faculty Center page).

The Grade Roster icon appears on the Faculty Center - My Teaching Schedule page after grade rosters are generated for a class and after the instructor has been assigned grade, approve, or post access within the schedule of classes. Instructors with grade, approve, or post access for the class can assign grades to students. Instructors with approve or post access can use the Approval Status field to update the status of the final grade roster before saving it. Values are Approved, Not Reviewed, and Ready for Review. A status of Approved is required to post the roster. When the status is set to Approved, the post button becomes available for instructors with post access. The instructor can then post grades from the self-service grade roster. When a class is posted, the Request Grade Change button becomes available for instructors to change a student's grade.

The select check box accommodates both the Notify feature as well as in conjunction with add this grade to selected students and add this requirement designation to selected students.

Click the Printer Friendly Version button to print a copy of the grade roster.

On the Grade Roster page, the values that are available in the add this grade to all students field and the Roster Grade field are those for which the Include in Self Service check box on the Grading Scheme Table page is selected.

The add this requirement designation to all students field appears only for classes that meet all of the following conditions:

- The class has a requirement designation that has a separate grade.
• The Grade Roster Type value is *Final Grade*.
• The Approval Status value is *Not Reviewed*.

The Converted Roster Grade field appears on the Grade Roster page when at least one roster grade has a value defined in the Convert to Grade field on the Grading Scheme Table page.

On the Grade Change Request page, the values that are available in the Official Grade field are those for which the Include in Self Service check box on the Grading Scheme Table page is selected.

---

**Viewing Self-Service Class Rosters**

This section lists the pages that instructors use to view class rosters through self-service.

**Pages Used to View Self-Service Class Rosters**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Roster</td>
<td>SS_FAC_CLASS_ROST</td>
<td>• Self Service, Faculty Center, Class Roster&lt;br&gt;• Self Service, Faculty Center, My Schedule Click the Class Roster icon for a class or the Class Roster subtab.</td>
<td>Instructors view the students who are enrolled in a class, have dropped a class, or are on the wait list for a class. Instructors can display student photos on the class roster.</td>
</tr>
<tr>
<td>Send Notification</td>
<td>SSS_NOTIFY</td>
<td>Click the Notify Selected Students or Notify All Students link on the Self-Service Class Roster page.</td>
<td>Instructors send email notifications to selected students or all students in a class. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.</td>
</tr>
<tr>
<td>Students Without Email Address</td>
<td>SSR_NO_EMAIL</td>
<td>This page appears when you click the Notify All Students link and there are students on the class roster who do not have email addresses in the system.</td>
<td>Displays the students on the class roster who do not have email addresses.</td>
</tr>
<tr>
<td>Printer Friendly Version</td>
<td>SS_FAC_CLSRSTR_PRT</td>
<td>Click the Printer Friendly Version link on the Self Service Class Roster page.</td>
<td>Displays a printer-friendly version of the class roster.</td>
</tr>
</tbody>
</table>
Using LMS Authentication

When you use PeopleSoft authentication, instructors can use self-service pages to link to their Learning Management System (LMS).

An LMS icon appears next to LMS classes on the Faculty Center - My Teaching Schedule page when a provider for authentication is identified or when an LMS URL is provided on the Schedule of Classes - LMS Data page.

Instructors can also access a list of LMS providers and select the appropriate provider link to directly access their home page in that LMS provider's website. See Configuring Your Learning Management System Third-Party Vendors for PeopleSoft Campus Solutions, which is posted to My Oracle Support.

Related Links
"Understanding Integration with LMS Self-Service User Authentication" (PeopleSoft Campus Solutions 9.0: Student Records)
"Understanding LMS Setup" (PeopleSoft Campus Solutions 9.0: Student Records)

Pages Used for Instructor Self-Service Pages and LMS Authentication

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Schedule</td>
<td>INSTR_CLASS3</td>
<td>Self Service, Faculty Center, My Schedule</td>
<td>Instructors transfer directly to the academic content for the specified class within the external LMS.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Learning Management button.</td>
<td></td>
</tr>
<tr>
<td>Learning Management Systems</td>
<td>LMS_TARGET_SELECT</td>
<td>Self Service, Learning Management Systems</td>
<td>Review a list of Learning Management System providers used by the institution. Click one of the links to be taken directly to the external LMS.</td>
</tr>
</tbody>
</table>

Using the LMS Icon to Access the LMS Website

Instructors can access the My Schedule self-service page and click the LMS icon to access the appropriate external LMS site.

When an LMS provider is identified for authentication and the instructor clicks the LMS icon, the system authenticates the user and directly accesses the academic content for the specified class within the external LMS. With authentication, the instructor does not have to log in to the external site.

If instead of a provider an LMS URL is specified, no authentication takes place. The system accesses the specified URL, such as an instructor's website, where a log may be required.

If neither an LMS provider nor an LMS URL are assigned to the class, the LMS icon does not appear.
Using the Provider Link to Access the LMS Site

Instructors can use the Learning Management System self-service page and click the LMS provider link to access the appropriate external LMS site. The system performs the authentication and transfers them directly to their home page in that provider's website. Because instructors are not tied to an institution, all providers are displayed when the Display as Provider Link is selected on the LMS Provider setup page.

**Related Links**

"Defining LMS Providers" (PeopleSoft Campus Solutions 9.0: Student Records)
Chapter 16

Using Self-Service Course Catalog and Schedule

Students, instructors, and community members use the self-service Class Search feature to search the schedule of classes for a specific institution and term, and the Browse Course Catalog feature to view courses offered at the institution. Students can access class search from several places within PeopleSoft Campus Self Service, and they can select classes directly from class search, even if they do not access class search through enrollment navigation. Instructors can access class search through the Faculty Center in Campus Self Service. They can see classes in their search results that do not appear to students because the Schedule Print check box for those classes has been cleared on the Maintain Schedule of Classes - Basic Data page.

The navigation tabs that are used in self-service class search are defined on the Navigation Tabs Setup page.

Related Links

Setting Up Self-Service Navigation

Searching for Classes Using Self-Service Pages

This section provides prerequisites and discusses how to:

- Select search criteria and search for classes.
- Review class search results.
- View class search details.
- Browse the course catalog.
- Select a course offering.
- Review course catalog details.

Prerequisites

Set up self-service class search in the Class Search Configuration component and the Display in Class Search page (Term Values Table).
## Related Links

"Setting Up Class Search Profiles" (PeopleSoft Campus Solutions 9.0: Student Records)
"Defining Term Values" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)

### Pages Used to Search for Classes Using Self-Service Pages

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for Classes - Search Criteria</td>
<td>SSR_CLSRCH_ENTRY</td>
<td>• Self Service, Search, Search for Classes</td>
<td>Users specify the academic institution and term in which they want search for classes. Users enter search criteria and retrieve results.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Student Center</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Planning, My Planner</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Planning, Enrollment Shopping Cart</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Class Search/Browse Catalog</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Enrollment, Enrollment: Add Classes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Class Search option.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Enrollment, Enrollment: Swap Classes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Class Search option.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search link.</td>
<td></td>
</tr>
<tr>
<td>Search for Classes - Search Results</td>
<td>SSR_CLSRCH_RSLT</td>
<td>Click the Search button on the Search for Classes page.</td>
<td>Review all classes that match the search criteria.</td>
</tr>
<tr>
<td>Search for Classes - Class Detail</td>
<td>SSR_CLSRCH_DTL</td>
<td>Click a class section on the Search for Classes - Search Results page.</td>
<td>Review detail for a specific class.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Browse Course Catalog</td>
<td>SSS_BROWSE_CATLG</td>
<td>• Self Service, Search, Browse Course Catalog</td>
<td>Browse the course catalog to see a list of courses offered at the institution.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Class Search/Browse Catalog, Browse Course Catalog</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Student Center</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Search link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Browse Course Catalog tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Planning, My Planner</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Browse Course Catalog button.</td>
<td></td>
</tr>
<tr>
<td>Browse Course Catalog - Select Course Offering</td>
<td>SSS_BCC_SEL_CRSE</td>
<td>On the Browse Course Catalog page, click a course title that includes this message: *** view multiple offerings.</td>
<td>Select the appropriate offering when a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title.</td>
</tr>
<tr>
<td>Browse Course Catalog - Course Detail</td>
<td>SSS_CRSE_OFFER_DTL</td>
<td>Click a course title on the Browse Course Catalog page.</td>
<td>View course details and access class sections.</td>
</tr>
</tbody>
</table>
Selecting Search Criteria and Searching for Classes

Access the Search for Classes page (Self Service, Search, Search for Classes).

**Image: Search for Classes – Enter Search Criteria (page 1 of 2)**

This example illustrates the fields and controls on the Search for Classes – Enter Search Criteria (page 1 of 2). You can find definitions for the fields and controls later on this page.
This example illustrates the fields and controls on the Search for Classes – Enter Search Criteria (page 2 of 2). You can find definitions for the fields and controls later on this page.

![Search for Classes - Enter Search Criteria](image)

Use the Class Search Configuration component to configure the grouping of criteria and whether groups appear expanded or collapsed.

See "Setting Up Class Search Profiles" (PeopleSoft Campus Solutions 9.0: Student Records)

**Note:** Students can also search for classes through self-service My Planner, My Requirements, and Browse Course Catalog pages. From those pages, students can select a course description to access the course detail; from there they can view class sections that are offered for a specified term.

<table>
<thead>
<tr>
<th><strong>Institution</strong></th>
<th>When accessed by a student through self-service navigation, the institution appears as default from the student's row in the STD_CAR_TERM table.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Term</strong></td>
<td>When accessed by a student from Class Search, the student's user preference term appears. When accessed from Add Classes or Swap Classes, the term selected appears here.</td>
</tr>
</tbody>
</table>
When accessed by a student from Class Search, the term drop down only includes terms that are valid as defined in the Display Term in Class Search date range on the Term Values Table.

**Note:** The Term field on the Search for Classes page changes from a drop-down list box to a search prompt if the selected institution has more than 300 terms.

**Course Subject**

This field changes from a drop-down list box to a select subject button if the selected institution has more than 300 course subjects or if the Class Search Subject Option field on the Student Records Installation page is set to *Prompt Search*.

**Note:** Users at multi-institution organizations can select the drop-down list box option on the Student Records Installation page. However the Course Subject field on the Search for Classes page will dynamically change to a select subject button for institutions with more than 300 course subjects.

**Course Career**

The student's academic career appears by default.

**Meeting Start Time**

To narrow search results by meeting start time, select one of the following:

- greater than: Finds classes with a meeting start time later than the specified time. For example, if you enter greater than 1:00PM, the system would only retrieve classes that have a meeting start time later than 1:00 PM.

- greater than or equal to: Finds classes with a meeting start time at or after the specified time.

- less than: Finds classes with a meeting start time earlier than the specified time.

- less than or equal to: Finds classes with a meeting start time at or earlier than the specified time.

- is exactly: Finds classes with a meeting start time that is exactly at the specified time.

**Meeting End Time**

To narrow search results by meeting end time, select one of the following:

- greater than: Finds classes with a meeting end time later than the specified time. For example, if you enter greater than 1:00PM, the system would only retrieve classes that have a meeting end time later than 1:00 PM, such as 2:00 PM.

- greater than or equal to: Finds classes with a meeting end time at or after the specified time.
Day of Week

To narrow search results by day of week, select one of the following:

- **Include Only These Days**: Finds classes that meet on the selected days. For example, if you select Monday and Thursday, the system will retrieve all classes that meet on Mondays and Thursdays only or Mondays, Thursdays, and other days.

- **Include Any of These Days**: Finds classes that meet on at least one of the selected days. So if you select Monday and Thursday, the system will retrieve all classes that meet on Monday only, Thursday only, or Mondays or Thursdays and other days.

- **Exclude Any of These Days**: Finds classes that do not meet on either of the selected days.

- **Exclude Only These Days**: Finds classes that do not meet on both of the selected days.

Minimum Units

To narrow search results by minimum units, select one of the following:

- **greater than**: Finds classes with minimum units greater than the specified units.

- **greater than or equal to**: Finds classes with minimum units equal to or greater than the specified units.

- **less than**: Finds classes with minimum units less than the specified units.

- **less than or equal to**: Finds classes with minimum units less than or equal to the specified units.

- **is exactly**: Finds classes with minimum units that are exactly the specified units.

Maximum Units

To narrow search results by maximum units, select one of the following:

- **greater than**: Finds classes with maximum units greater than the specified units.
• greater than or equal to: Finds classes with maximum units equal to or greater than the specified units.

• less than: Finds classes with maximum units less than the specified units.

• less than or equal to: Finds classes with maximum units less than or equal to the specified units.

• is exactly: Finds classes with minimum units that are exactly the specified units.

**Reviewing Class Search Results**

Access the Search for Classes - Search Results page (click the Search button on the Search for Classes page).

**Image: Search for Classes - Search Results page**

This example illustrates the fields and controls on the Search for Classes - Search Results page. You can find definitions for the fields and controls later on this page.
**Wait List**

This icon only appears in the legend if you select the Use Wait Listing check box on the Self Service - Student Records Setup page. Likewise, if you clear the Use Wait Listing check box, the search results will either have a status of open or closed for classes.

If the Show Class Results Instructions check box is selected on the Class Result Options page, then the message text from that page appears as introductory text on the Search Results page.

See "Defining Class Search Result Options" (PeopleSoft Campus Solutions 9.0: Student Records)

**Note:** The Schedule Print check box on the Maintain Schedule of Classes - Basic Data page indicates whether a class section appears in the student and visitor class search results or on the printed class schedule. For instructors and advisors, all class sections are displayed in class search results. The message "Section not shown to students" is displayed for those class sections for which the Schedule Print check box is cleared.
Viewing Class Search Details

Access the Search for Classes - Class Detail page (click a class section on the Search for Classes - Search Results page).

Image: Search for Classes - Class Detail page

This example illustrates the fields and controls on the Search for Classes - Class Detail page. You can find definitions for the fields and controls later on this page.

This page displays all information from the course catalog, plus class schedule information. Use the Class Detail Options page in the Class Search Configuration component to determine which information appears on this page to students and faculty.
Related Links
"Setting Up Class Search Profiles" (PeopleSoft Campus Solutions 9.0: Student Records)
Browsing the Course Catalog

Access the Browse Course Catalog page (Self Service, Class Search/Browse Catalog, Browse Course Catalog).

Image: Browse Course Catalog page

This example illustrates the fields and controls on the Browse Course Catalog page. You can find definitions for the fields and controls later on this page.

Select subject code to display or hide course information.

ACCT - Accounting

ANATOMY - Anatomy

ANTHRO - Anthropology

ART - Art

<table>
<thead>
<tr>
<th>Select</th>
<th>Course Nbr</th>
<th>Course Title</th>
<th>Typically Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100</td>
<td>Basic Studio in Art</td>
<td>Fall, Spring</td>
</tr>
<tr>
<td></td>
<td>101</td>
<td>Art Survey</td>
<td>Fall</td>
</tr>
<tr>
<td></td>
<td>111</td>
<td>Introductory Art Seminar</td>
<td>Fall, Spring</td>
</tr>
<tr>
<td></td>
<td>112</td>
<td>History of World Art</td>
<td>Spring</td>
</tr>
<tr>
<td></td>
<td>113</td>
<td>History of World Art</td>
<td>Fall</td>
</tr>
<tr>
<td></td>
<td>121</td>
<td>Introductory Painting</td>
<td>Fall, Spring, Summer</td>
</tr>
<tr>
<td></td>
<td>122</td>
<td>Survey of Printmaking</td>
<td>Winter</td>
</tr>
</tbody>
</table>

Students and instructors can browse the course catalog by academic subject. Students can also select courses to add to their planner. If they click a Course Nbr (course number) or course title, they can view the course details and also view section information for the indicated term. Students with a single career
are able to add courses to their planner directly from the Browse Course Catalog page or from the Course Detail page. Students with multiple careers are only able to add courses to their planner from the Course Detail page.

When a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title, students and instructors are taken to the Select Course Offering page when they click the course number or course title—see ART 130 in the previous page example. Notice that the course title includes this message: *** view multiple offerings.

**Selecting a Course Offering**

Access the Browse Course Catalog - Select Course Offering page (on the Browse Course Catalog page, click a course title that includes this message: *** view multiple offerings).

**Image: Browse Course Catalog - Select Course Offering page**

This example illustrates the fields and controls on the Browse Course Catalog - Select Course Offering page. You can find definitions for the fields and controls later on this page.

Use this page to select the appropriate offering when a course ID has multiple offerings with the same subject, course number, and title, or when multiple course IDs have the same subject, course number, and title.
Reviewing Course Catalog Details

Access the Browse Course Catalog - Course Detail page (click a course title on the Browse Course Catalog page or a course offering link on the Browse Course Catalog - Select Course Offering page).

Image: Browse Course Catalog - Course Detail page (1 of 2)

This example illustrates the fields and controls on the Browse Course Catalog - Course Detail page (1 of 2). You can find definitions for the fields and controls later on this page.

![Browse Course Catalog - Course Detail page](image)

Course Schedule

Students and instructors can select a term and click the show sections button to view class sections for the course. The Terms Offered drop down list box only includes: terms that are valid as defined in the Display Term in Class Search date range on the Term Values table, and those with sections scheduled within the term. For students, the select button only appears if the Enrollment & Shopping Cart date range on the Term Table under Display in Self-Service is valid.
See "Defining Terms, Sessions, and Session Time Periods" (PeopleSoft Campus Solutions 9.0: Application Fundamentals).

**Image: Browse Course Catalog - Course Detail page (2 of 2)**

This example illustrates the fields and controls on the Browse Course Catalog - Course Detail page (2 of 2). You can find definitions for the fields and controls later on this page.

### Course Schedule

<table>
<thead>
<tr>
<th>Terms Offered</th>
<th>show sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009 Fall</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My Class Schedule</th>
<th>Shopping Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>HISTORY 120</td>
<td>Your shopping cart is empty.</td>
</tr>
<tr>
<td>MoWeFr 9:00AM - 9:50AM</td>
<td></td>
</tr>
<tr>
<td>Room: TBA</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Open</th>
<th>Closed</th>
<th>Wait List</th>
</tr>
</thead>
</table>

#### ANTHRO 101 sections for 2009 Fall

<table>
<thead>
<tr>
<th>Section</th>
<th>Session</th>
<th>Status</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-LEC (1044)</td>
<td>1</td>
<td><img src="image" alt="Open" /></td>
<td>08/30/2009 - 12/12/2009</td>
</tr>
<tr>
<td>MoWeFr 10:00AM - 10:50AM TBA</td>
<td>Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section</th>
<th>Session</th>
<th>Status</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-LEC (1596)</td>
<td>1</td>
<td><img src="image" alt="Open" /></td>
<td>08/30/2009 - 12/12/2009</td>
</tr>
<tr>
<td>TBA TBA TBA</td>
<td>Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section</th>
<th>Session</th>
<th>Status</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>101-LEC (6427)</td>
<td>12W</td>
<td><img src="image" alt="Open" /></td>
<td>09/06/2009 - 11/28/2009</td>
</tr>
<tr>
<td>Mo 1:00PM 2:00PM TBA</td>
<td>Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 17

Using Self-Service Academic Planning

Prerequisites for Using Self-Service Academic Planning

Before students can use self-service academic planning features, the student must have a user ID in the system. The student must also be matriculated and have a role that includes security access to My Planner.

Planning Courses

This section discusses how students plan courses using My Planner functionality.

The navigation tabs that are used in self-service academic planning are defined on the Navigation Tabs Setup page.

Related Links

Setting Up Self-Service Navigation

Understanding My Planner

Self-service My Planner functionality provides students with a tool to plan their courses for an individual term, multiple terms, or for their entire stay at the institution. After students add courses to their planner, they can proceed directly from planning to enrollment. Students with multiple careers are provided with a planner for each career.

The Planner differs from the enrollment shopping cart in the following way: the shopping cart requires students to add scheduled class sections to their cart, whereas the planner enables students to accomplish long-range planning by adding courses to their planner, whether or not the class schedule has been created for future terms.

When students access My Planner, past terms are collapsed while current and future terms are expanded. Current and future terms are determined by the Student Planner date range defined on the Term table under Display In Self-Service.

Depending on your Installation Student Administration setup, you can implement the planner using one of the following: Academic Advisement or Program Guide. If the institution does not use either, then the planner still works exclusively with Browse Course Catalog. To disable the planner, remove My Planner security; the planner page and references to planner will be hidden.

My Planner includes three ways for students to take action. They can:

• Add courses to their planner using the Browse Course Catalog or Plan by my Requirements buttons.

• Assign courses to a projected term.
The Move selected courses to Term drop down list box only includes terms that are valid as defined in the Student Planner date range on the Term Table under Display In Self-Service.

- View planned courses by term and proceed to enroll in a course when enrollment becomes available for the term. Students can enroll in planned courses from My Planner by selecting the course description to access the course detail and view sections scheduled for a selected term; students can then select the section for which they want to enroll. Students can also enroll in planned courses from the shopping cart, add, and swap pages.

### Page Used to Plan Courses

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Planner</td>
<td>SSS_MY_PLANNER</td>
<td>• Self Service, Academic Planning, My Planner</td>
<td>Students plan courses based on their academic requirements or by browsing the course catalog.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Plan link on the Student Center page.</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Plan by My Requirements</td>
<td>SAA_SS_DPR_ADB</td>
<td>Click the Plan by my Requirements button on the My Planner page.</td>
<td>Students review a comprehensive list of their degree requirements and access course details linked to a particular requirement. Students can add courses to their planner and view class sections offered for a selected term from the Course Details page. Term activated students also have the option of directly adding classes to their shopping cart and proceeding to enrollment.</td>
</tr>
<tr>
<td>Browse Course Catalog</td>
<td>SSS_BROWSE_CATLG</td>
<td>Click the Browse Course Catalog button on the My Planner page.</td>
<td>Students can review all active courses within the course catalog and add courses valid for their institution and career to their planner. As with Plan by My Requirements, students are able to drill down on the Course Detail page to view class sections for a selected term and, if term activated, to directly add classes to their shopping cart.</td>
</tr>
</tbody>
</table>
## Maintaining the Enrollment Shopping Cart

This section discusses how students maintain their course selections using shopping cart functionality.

### Understanding the Shopping Cart

Shopping cart functionality enables students to plan enrollment in class sections for a particular term. Students can validate their class sections to check for common problems such as time conflicts and prerequisites. Students can add classes to the shopping cart using My Planner or the My Requirements feature.

The system stores a student's class selections for a particular term and the student can access them as long as the term is available for enrollment. A class remains in the cart until the student is successfully enrolled or decides to delete it.

### Page Used to Maintain the Course Shopping Cart

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping Cart</td>
<td>SSR_SSENRL_CART</td>
<td>• Self Service, Academic Planning, Enrollment Shopping Cart</td>
<td>Student manages stored course sections selected using My Planner or My Requirements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Plan link on the Student Center page, then click the shopping cart tab.</td>
<td></td>
</tr>
</tbody>
</table>
Viewing Course History

This section discusses how students view their course history, which is a summary of all courses taken through the current term.

Page Used to View Academic History

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Course History</td>
<td>SSS_MY_CRSEHIST</td>
<td>• Self Service, Academic Planning, My Course History&lt;br&gt;• Click the Plan link on the Student Center page, then click the course history tab.</td>
<td>Students can review information for courses taken, those they received transfer credit for, and those in progress. They can choose to show or hide courses from My Planner and the shopping cart. Note: This page is intended to provide an easy-to-read view of a student's progress; it is not intended to serve as a transcript of the student's academic record.</td>
</tr>
</tbody>
</table>
Chapter 18

Using Self-Service Academic Services

Understanding My Academics

The My Academic self-service page provides students with their current program and plan information in a tree structure and also provides a set of links to important academic information.

The sections that My Academics displays are:

- Academic Requirements
- What-if Report
- Advisors
- Transfer Credit
- Course History
- Transcript
- Enrollment Verification
- Graduation

Related Links
Prerequisites for Using Academic Advisement Self Service
Applying for Graduation Using Self-Service Pages
Viewing Course History

Using Self-Service My Academics Functionality

Students can use the self-service My Academics functionality.

Pages Used to Use Self-Service My Academics Functionality

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Academics</td>
<td>SSS_MY_ACAD</td>
<td>Student Center, My Academics</td>
<td>Students can access high-level academic data and link to various tasks.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>My Academic Requirements</td>
<td>SAA_SS_DPR_ADB</td>
<td>Click the View my advisement report link on the My Academics page.</td>
<td>Students can use this page to access the degree progress report, evaluate their degree progress, make decisions about what to enroll in next, and then either enroll in courses or add courses to their course planners.</td>
</tr>
<tr>
<td>What-if Report Selection</td>
<td>SAA_SS_WHATIF_SEL</td>
<td>• Click the Create a what-if scenario link on the My Academics page.</td>
<td>Students can request an advisement report based on what-if program and plan scenarios. Also, if the institution enables it, students can also run a course what-if report.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Degree Progress/Graduation, View What-If Report</td>
<td></td>
</tr>
<tr>
<td>View My Advisors</td>
<td>SS_STDNT_Advisr</td>
<td>• Click the View my advisors link on the My Academics page.</td>
<td>Students can view a list of their assigned advisors by academic institution, career, program, and plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Records, View My Advisors</td>
<td></td>
</tr>
<tr>
<td>Send Notification</td>
<td>SSS_NOTIFY</td>
<td>Click the Notify Selected Advisors or the Notify All Advisors links on the View My Advisors page.</td>
<td>Students send email notifications to one or more of their advisors. If a notification failure occurs, the sender receives a returned email indicating the type of failure, for example, host unknown.</td>
</tr>
<tr>
<td>Evaluate My Transfer Credit</td>
<td>SS_TRCR_SRCH</td>
<td>• Click the Evaluate my transfer credits link on the My Academics page.</td>
<td>Students can evaluate any transfer credits.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Transfer Credit, Evaluate My Transfer Credit</td>
<td></td>
</tr>
<tr>
<td>View Transfer Credit Report</td>
<td>SS_TRCR_RPT</td>
<td>• Click the View my transfer credit report link on the My Academics page.</td>
<td>Students can view their Transfer Credit reports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Transfer Credit, View Transfer Credit Report</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>My Course History</td>
<td>SSS_MY_CRSEHIST</td>
<td>• Click the View my course history link on the My Academics page.</td>
<td>Students can review information for courses taken, those they received transfer credit for, and those in progress. They can choose to show or hide courses from My Planner.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Records, My Course History</td>
<td></td>
</tr>
<tr>
<td>View Unofficial Transcript</td>
<td>SSS_TSRQST_UNOFF</td>
<td>• Click the View my unofficial transcript link on the My Academics page.</td>
<td>Students can view their unofficial transcripts.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Records, View Unofficial Transcript</td>
<td></td>
</tr>
<tr>
<td>Request Official Transcript</td>
<td>SS_TSCRPT_OFF</td>
<td>• Click the Request official transcript link on the My Academics page.</td>
<td>Students can request official transcripts from the institution.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Academic Records, Request Official Transcript</td>
<td></td>
</tr>
<tr>
<td>Request Enrollment</td>
<td>SS_ENRL_VER_REQ</td>
<td>• Click the Request enrollment verification link on the My Academics page.</td>
<td>Students can request enrollment verification online or by mail, with multiple processing options.</td>
</tr>
<tr>
<td>Verification</td>
<td></td>
<td>• Self Service, Academic Records, Request Enrollment Verification</td>
<td></td>
</tr>
<tr>
<td>Apply for Graduation</td>
<td>SS_GRAD_APPLY</td>
<td>• Click the Apply for graduation link on the My Academics page.</td>
<td>Students can select academic programs and apply for graduation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Degree Progress/Graduation, Apply for Graduation</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 19

Using Self-Service Enrollment

Understanding Self-Service Enrollment

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

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

The navigation tabs that are used in self-service enrollment are defined on the Navigation Tabs Setup page.


Self-Service Enrollment Shopping Cart Validation and Enrollment Messages

Oracle delivers a set of error and informational message sets exclusively for the Enrollment Shopping Cart Validation feature and self-service enrollment processing. These message sets enable the enrollment process to return more self-service-friendly messages. You can modify these messages to meet the specific needs of your students. You can view and make changes to these messages using the PeopleTools Message Catalog component (MESSAGE_CATALOG1) (PeopleTools, Utilities, Administration, Message Catalog).

These message sets are:

- Validation (Message Set 14632): These messages are returned when a student selects Validate on the Enrollment Shopping Cart page. The system returns a validation-specific message rather than a regular enrollment engine message. For example, if the validation process finds a time conflict, the message 14632, 17 is returned rather than the enrollment engine message 14640, 17.

- Enrollment (Message Set 14641): This message set is used for all messages received through self-service enrollment (excluding Enrollment Shopping Cart Validation). While actual enrollment is processed in the same way for self-service enrollment as when it is processed using an administrative user page, such as Quick Enroll, the fact that a request was submitted through self-service enrollment now causes the system to return a self-service-specific error or informational message. For example, if an enrollment request submitted through the Quick Enroll component (QUICK_ENROLL) returns message 14640, 17 (time conflict), the same request submitted through self-service returns the self-service-specific message 14641, 17. This enables more appropriate self-service messaging, without changing the messages used for non-self-service, administrative users.
Related Links
Searching for Classes Using Self-Service Pages

Viewing a Class Schedule

This section lists the pages that students use to view their class schedule from self-service pages.

Pages Used to View a Class Schedule

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Class Schedule</td>
<td>SSR_SSENRL_LIST</td>
<td>• Self Service, Enrollment</td>
<td>Students use this page to view their class schedules for a term.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Student Center, Enroll, My Class Schedule</td>
<td></td>
</tr>
<tr>
<td>Textbook Summary</td>
<td>SSR_SSCLSTXB_SUM</td>
<td>Click the View Textbook Summary link on the My Class Schedule page.</td>
<td>Students can view textbook assignments for each of their classes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The link is available if you select the Display Textbook Summary link – Student Self Service check box on the Other page in the Student Records setup component (SSR_SS_ENRL_OPT).</td>
</tr>
<tr>
<td>Weekly Schedule</td>
<td>SS_WEEKLY_SCHEDULE</td>
<td>• Self Service, Enrollment, My Class Schedule</td>
<td>Students use this page to view their weekly schedules.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select the Weekly Calendar View option.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Enrollment, View My Weekly Schedule</td>
<td></td>
</tr>
<tr>
<td>Academic Calendar Deadlines</td>
<td>ACAD_CAL_DATES</td>
<td>Click the Academic Calendar Deadlines icon on the My Class Schedule page.</td>
<td>Students use this page to view drop, cancel, and withdrawal deadlines for a class on their class schedules. The page also enables students to access Gradebook and the Learning Management System if the institution sets up the connections.</td>
</tr>
</tbody>
</table>
Adding Classes

This section lists the pages that students use to add classes to their schedules from Campus Self Service.

Pages Used to Add Classes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Add Classes                        | SSR_ENRL_CART   | • Self Service, Enrollment, Enrollment: Add Classes  
|                                    |                 |  • Student Center, Enroll, add                  | Students can use this page to request enrollment in classes for a term. |
| Related Class Sections             | SSR_CLS_RELCOMP | Click the Next button on the Add Classes page.   | Students use this page to select related class sections to add.       |
| Add Classes - Select Classes to Add - Enrollment Preferences | SSR_CLS_DTLOPT   | Click the Select a Class button on the Select Classes to Add - Class Detail page. | Students use this page to complete the information for their class enrollment requests. |
| Add Classes - Confirm Classes      | SSR_SSENRL_ADD_C | Click the Next button on the Add Classes - Select Classes to Add - Enrollment Preferences page. | Students use this page to confirm their selections and initiate the enrollment engine. |
| Add Classes - View Results         | SSR_SSENRL_RSLT | Click the Enroll button on the Confirm Classes page. | Students use this page to view the result of their enrollment request. |

Dropping Classes

This section lists the pages that students use to drop classes from their schedules through Campus Self Service.

Pages Used to Drop Classes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Drop Classes                       | SSR_SSENRL_DROP    | • Self Service, Enrollment, Enrollment: Drop Classes  
|                                    |                    |  • Student Center, Enroll, drop                  | Students use this page to drop classes from their schedules.                          |
| Drop Classes - Confirm Your Selection | SSR_SSENRL_DROP_C | Click the Drop Classes button on the Drop Classes page. | Students use this page to confirm their selections.                                    |
Swapping Classes

This section lists the pages that students use to swap classes using self-service pages.

Pages Used to Swap Classes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Swap                              | SSR_SSENRL_SWAP | • Self Service, Enrollment, Enrollment: Swap Classes  
 • Student Center, Enroll, swap | Students can use this page to request to swap an existing class enrollment within a term for a different class enrollment. |
| Select a class to swap - Enrollment Preferences | SSR_CLS_DTLOPT | Click the Select a Class button on the Select Classes to swap - Class Detail page. | Students use this page to complete the information for their class enrollment requests. |
| Swap Classes - Confirm your selection | SSR_SSENRL_SWAP_C | Click the Next button on the Select a class to swap - Enrollment Preferences page. | Students use this page to confirm their selections and initiate the enrollment engine. |
| Swap Classes - View Results       | SSR_SSENRL_RSLT | Click the Next button on the Swap Classes - Confirm your selection page. | Students use this page to view the results of their swap requests. |

Editing Classes

This section lists the pages that students use to edit their enrollment requests through Campus Self Service.

Pages Used to Edit Classes

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Edit      | SSR_SSENRL_EDIT | • Self Service, Enrollment, Enrollment: Edit a Class  
 • Student Center, Enroll, edit | Students use this page to select a class to edit. |
**Viewing Term Information**

This section provides an overview of term information and discusses how to:

- Use LMS Authentication.
- Use the LMS Button to Access the LMS Website.

**Understanding Term Information**

The Term Information page provides students with a single access point that links to the following pages:

- Enrollment Dates.
- View Assignments and Grades.
- My Learning Management Systems.
- My Exam Schedule.
- View My Grades.

**Pages Used to View Term Information**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term Information</td>
<td>SSR_SS_TERM_LINKS</td>
<td>Student Center, Enroll, Term Information</td>
<td>Students use links to access enrollment dates, assignments, learning management systems, exam schedules, and grades.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enrollment Dates</td>
<td>SSR_SSENRL_APPT</td>
<td>Click the View my enrollment dates link on the Term Information page.</td>
<td>Students can view detail information about their enrollment appointments, such as start date, end date, start time, end time, and unit limits.</td>
</tr>
<tr>
<td>View Assignments and Grades</td>
<td>SS_LAM_STD_GR_LST</td>
<td>Click the View my class assignments and grades link on the Term Information page.</td>
<td>Students can view assignment and grade information for classes that use the Gradebook feature.</td>
</tr>
<tr>
<td>My Learning Management Systems</td>
<td>SSR_LMS_TARGET</td>
<td>Click the View learning management systems link on the Term Information page.</td>
<td>Students access a list of LMS providers and click the appropriate provider links to directly access their home pages in those LMS providers' websites.</td>
</tr>
<tr>
<td>My Exam Schedule</td>
<td>SSR_SSENRL_EXAM_L</td>
<td>Click the View my exam schedule link on the Term Information page.</td>
<td>Students view their exam schedule for a term.</td>
</tr>
<tr>
<td></td>
<td>SSR_SS_WEEK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View My Grades</td>
<td>SS_ES_GRADE_LIST</td>
<td>Click the View my grades link on the Term Information page.</td>
<td>Students can view final and midterm grades for a selected term.</td>
</tr>
</tbody>
</table>

**Using LMS Authentication**

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

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

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

**Related Links**

"Understanding Integration with LMS Self-Service User Authentication" (PeopleSoft Campus Solutions 9.0: Student Records)

"Defining LMS Providers" (PeopleSoft Campus Solutions 9.0: Student Records)
Using the LMS Button to Access the LMS Website

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

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

If instead of a provider an LMS URL is specified, no authentication takes place. The system transfers the student to the specified URL, such as an instructor's website, where he or she might have to log in.

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

If neither an LMS provider nor an LMS URL is assigned, the LMS button does not appear.
Chapter 20

Using Self-Service Program Enrollment

Configuring Navigation for Self-Service Program Enrollment

You can use the Navigation Tabs Setup component to configure the two-level folder tabs for self-service Program Enrollment. The Program Enrollment functional area can be used to change the order of each of the tab levels and to change the names of the delivered tabs or add additional tabs.

See Setting Up Self-Service Navigation

Deploying Homepage Pagelets for Self-Service Program Enrollment

You can deploy the following pagelets on your portal homepage:

- My Academic Information.
- My Advisors.
- My Academic Progress Tracker (Program Enrollment-specific data based on APT).

We recommend that you deploy this particular pagelet because it provides a single entry point to planning and enrollment.

Using Program Enrollment Self-Service Features

The following self-service Program Enrollment features are delivered:

- Program Overview
- My Education Plan
- My Course Selection
- My Schedule Builder
- My Classes
- My Results

Refer to the following documents on My Oracle Support Doc ID 1400723.1:

- Using the Rules Engine for Program Enrollment Student Self-Service: System/Example Data
• Student Enrollment Event

• Using BI Publisher and the XMLP Results Template to Display Students’ Results and Outcomes in Program Enrollment Self Service: Sample Template

• Using the Self-Service Academic Item Registry Details Page

**Related Links**
"Creating and Managing APT Instances Using the Academic Progress Tracker Component" (PeopleSoft Campus Solutions 9.0: Student Records)
"Managing APT Enrollment" (PeopleSoft Campus Solutions 9.0: Student Records)
"Setting Up Rules for Program Enrollment" (PeopleSoft Campus Solutions 9.0: Student Records)

**Pages Used for Self-Service Program Enrollment**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Overview</td>
<td>SSR_PRG_TREE_CRDE</td>
<td>Self Service, Program Enrollment, Program Overview</td>
<td>Provides a display-only view of a student’s entire program/ APT instance.</td>
</tr>
<tr>
<td>My Education Plan</td>
<td>SSR_MP</td>
<td>Self Service, Program Enrollment, My Education Plan</td>
<td>Allows students to review program requirements by term (equates to term node) and to select courses.</td>
</tr>
<tr>
<td>My Course Selection</td>
<td>SSS_PE_PLNR_CRSE</td>
<td>Self Service, Program Enrollment, My Course Selection</td>
<td>Provides a view of courses by term, including required courses and any optional courses selected by the student.</td>
</tr>
<tr>
<td>My Schedule Builder</td>
<td>SSR_APT_SCHD_BLDR</td>
<td>Self Service, Program Enrollment, My Schedule Builder</td>
<td>Students use the Schedule Builder to enroll in classes. The data in the Schedule Builder is sourced only from APT.</td>
</tr>
<tr>
<td>My Classes</td>
<td>SSR_SS_MY_CLASSES</td>
<td>Self Service, Program Enrollment, My Classes</td>
<td>Students view their classes and can add and drop classes.</td>
</tr>
<tr>
<td>My Results</td>
<td>SSR_APT_DAT_RPT_CM</td>
<td>Self Service, Program Enrollment, My Results</td>
<td>Students can view results for courses and other program elements.</td>
</tr>
</tbody>
</table>
Chapter 21

Using Self-Service Activity Management

Managing the Activity Management WorkCenter

This section provides an overview of the Activity Management WorkCenter and discusses how to access the pages of the WorkCenter for instructional staff.

Understanding the Activity Management WorkCenter

The Activity Management WorkCenter is the instructional staff access to maintain coursework and student results. The functionality is similar to the Activity Manager, and the Activity and Result Rosters, but instructional staffs only have access to their classes and/or exams. Instructional staff can update coursework items; view activity rosters, assign activities and access student attachments; and enter results. Settings in the administrative component control what actions instructional staff can perform and what data they can view. These settings are as follows:

- Institution Table – ability to update coursework and calculate results.
- Class Table – grade access.
- Section Manager – exam result access.
- Result Dates – controls when result entry can be performed.

See:

- "Setting Up Activity Management Throughout Campus Solutions" (PeopleSoft Campus Solutions 9.0: Student Records)
- "Defining Academic Institutions" (PeopleSoft Campus Solutions 9.0: Application Fundamentals)

Pages Used to Manage the Activity Management WorkCenter

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Manager</td>
<td>SSR_ACR_MAIN_SS</td>
<td>Self Service, Activity Management WorkCenter</td>
<td>After selecting a class or exam from the left side navigation, the Manage Roster WorkCenter appears. When on the Manage Coursework tab, select the Manage Roster icon to access this page.</td>
</tr>
<tr>
<td>Instructors</td>
<td>SSR_ACSS_INSTR_SEC</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters</td>
<td>Select the Instructor Name link to access contact information for the instructor.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Result Access</td>
<td>SSR_AMWC_RWK_SEC</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters</td>
<td>Select to display the result access available to the instructor for the particular activity.</td>
</tr>
<tr>
<td>Activity Roster</td>
<td>SSR_ACR_ROSTER_SS</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters</td>
<td>Select the activity roster icon to access information on the students associated with the activity.</td>
</tr>
<tr>
<td>Activity Roster – Student Detail</td>
<td>SSR_ACR_IAMTREESS</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters, Activity Roster</td>
<td>Select the student detail link to access the entire course content tree for the student.</td>
</tr>
<tr>
<td>Activity Dates</td>
<td>SSR_ADC_ACTN_SEC</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters, Activity Roster</td>
<td>Select the Activity Dates link to view the activity dates associated with the student.</td>
</tr>
<tr>
<td>Attachments</td>
<td>SSR_ACTIVITY_ATT</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters, Activity Roster</td>
<td>Select to access any attachments submitted by the student.</td>
</tr>
<tr>
<td>Result Roster</td>
<td>SSR_ACR_RESULT_SS</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters</td>
<td>Select the result roster icon to grade the activity.</td>
</tr>
<tr>
<td>Result Scale Table</td>
<td>SSR_AC_SCALE_SS_SP</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters, Result Roster</td>
<td>Select the Result Scale icon to view details about the result scale associated with the student.</td>
</tr>
<tr>
<td>Activity Root Roster</td>
<td>SSR_ACR_MASTR</td>
<td>Self Service, Activity Management WorkCenter, Manage Rosters</td>
<td>Select the Activity Root Roster link to view the root roster for the course.</td>
</tr>
<tr>
<td>Maintain Coursework</td>
<td>SSR_ACM_MAIN_SS</td>
<td>Self Service, Activity Management WorkCenter, Manage Coursework</td>
<td>After selecting a class or exam from the left hand navigation the Manage Roster WorkCenter displays. Select the Manage Coursework tab or select the Manage Coursework icon to access this page.</td>
</tr>
<tr>
<td>Insert Activity</td>
<td>SSR_ACSS_INSSEC</td>
<td>Self Service, Activity Management WorkCenter, Manage Coursework</td>
<td>Select to insert a new activity or edit an existing one.</td>
</tr>
</tbody>
</table>

Managing Student Activities

This section provides an overview of self-service student activities and discusses how to access the student My Activities and My Exams pages.
Understanding Self-Service Student Activities

Student activities are accessible for students in self service if students are associated with a Program Enrollment structure and for courses applicable to one of these programs. Students can perform the following actions in self service:

- View the coursework and coursework detail for their courses.
- View previous attempts and previous attempt results.
- Select optional activities.
- Confirm their attendance for exams.
- Download attachments from their instructor.
- Upload assignments.
- View extenuating circumstances associated with their results.
- View exams and exam details.

Access to select optional activities and confirm attendance are set up on the Activity Dates component.

See "Understanding Activity Management" (PeopleSoft Campus Solutions 9.0: Student Records)

Pages Used in My Activities and My Exams

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Activities</td>
<td>SSR_SS_MY_ACTIVITY</td>
<td>Self Service, Program Enrollment, My Activities – Show Activity Details or Show Results</td>
<td>View of all courses and coursework for a term.</td>
</tr>
<tr>
<td>Activity Details</td>
<td>SSR_ACT_DET_SEC</td>
<td>Self Service, Program Enrollment, My Activities – Show Activity Details or Show Results</td>
<td>Select the Activity Description link to view details about the activity.</td>
</tr>
<tr>
<td>Previous Attempts</td>
<td>SSR_PR_ATTEMPT_SEC</td>
<td>Self Service, Program Enrollment, My Activities – Show Activity Details or Show Results</td>
<td>Select the Previous Attempts link to view previous attempt information. Available when multiple attempts have been made. Displays data for all attempts.</td>
</tr>
<tr>
<td>Attachments</td>
<td>SSR_IAM_CONT_ATT</td>
<td>Self Service, Program Enrollment, My Activities – Show Activity Details</td>
<td>Select the Attachments link to download attachments from the instructor or to upload assignments to the instructor.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------</td>
<td>-------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Extenuating Circumstances</td>
<td>SSR_IAM_EXTN_SEC</td>
<td>Self Service, Program Enrollment, My Activities – Show Results</td>
<td>Select the Extenuating Circumstances link to display assigned extenuating circumstances associated to the result. Only displays when an extenuating circumstance was assigned.</td>
</tr>
<tr>
<td>My Exams</td>
<td>SSR_SS_MY_EXAMS</td>
<td>Self Service, Program Enrollment, My Exams</td>
<td>Lists exams assigned to the student for a specific academic period.</td>
</tr>
<tr>
<td>Exam Details</td>
<td>SSR_ACT_DET_SEC</td>
<td>Self Service, Program Enrollment, My Exams</td>
<td>Select the Activity Description link to view details about the exam.</td>
</tr>
</tbody>
</table>
Campus Solutions provides a useful set of self-service functions for a school’s research candidate population as well as for their administrators. Research candidates can use the Candidate Center as a one-stop self-service page to view the status of their research projects as well as initiate service actions such as service requests or research service items. The Service Request page is used by the candidates to track and update their service requests.

Administrators can use the Service Request Dashboard to view and update the service requests in their queue. Administrators who serve as research or academic project supervisors can also manage their assigned candidates from the dashboard. The dashboard also displays graphically, in the form of pie chart and bar chart, the types and statuses of service requests assigned to an administrator. Administrators can initiate online notifications from their service request pages and also view their notifications generated by the Notification Framework.

Candidates, prospective applicants, and administrators can search for research topics that are offered in their institution through self service.

Understanding the Candidate Center

The Candidate Center consists of a dozen self-service pages depending on your setup. One of the goals of the candidate center is to expose to the candidate information that is maintained in the Candidate Management and Thesis Management administrator components. Candidates would be able to monitor the status of their research project and thesis evaluation on their own. Because the information contained in these components was not originally intended for candidates to view, administrators have the ability to configure the Candidate Center to limit the information that can be displayed to candidates. In addition to allowing candidates to monitor their status, another goal of the center is to allow candidates to initiate service actions. Candidates will be able to initiate existing service requests, as well as a new service action called research service items. Research service items are similar to service requests except that they are designed to automatically update the candidate’s research and thesis records without administrator intervention.
The Candidate Center is comprised of two regions: My Research Projects and My Service Items.

**Image: Candidate Center**

**Candidate Center**

### My Research Projects

When a candidate first opens the Candidate Center, if the candidate is assigned to any research projects the projects appear in the My Research Projects region. The links listed below the project will allow the candidate to drill down into the project to determine the current status of their research topics, supervisors, thesis, consumption and submission information, and other assignments.

If the candidate does not have an active project (that is, not a research candidate or admissions applicant), the system prompts the user to provide the academic institution. The system uses the academic institution to display any service items that can be initiated by the user, such as a request for admissions information.

### My Service Items

In the My Service Items region, candidates see service items that they can initiate. Service items are organized in separate tabs. A selected service item may initiate a service request and be assigned to an administrator for processing, or initiate a research service item that will update the candidate's research information directly.
Candidate Center Status Detail Pages

The following status detail pages provide an example of all the fields that may or may not appear, and show current information about the candidate. You cannot view historical information from these pages. Comments and attachments that can be viewed are those that are current and are marked for public view.

Image: Research Topic Details page

This example illustrates the fields and controls on the Research Topic Details page.

### Research Topic Details

<table>
<thead>
<tr>
<th>Topic Code:</th>
<th>RT0031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Topic:</td>
<td>The impact of excessive steroid use in children</td>
</tr>
<tr>
<td>Topic Description:</td>
<td>Long term study of the effects of steroid use.</td>
</tr>
<tr>
<td>Thesis Title:</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>Submitted SS</td>
</tr>
<tr>
<td>Status Date:</td>
<td>02/05/2014</td>
</tr>
<tr>
<td>Comment:</td>
<td></td>
</tr>
</tbody>
</table>

### Attachments

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research_proposal_draft.doc</td>
<td>Research_proposal_draft.doc</td>
<td>View</td>
</tr>
</tbody>
</table>

Return
To access the Research Topic Details page, go to Candidate Center, My Research Projects region, then click a research topic link.

**Image: Supervisor Details page**

This example illustrates the fields and controls on the Supervisor Details page.

![Supervisor Details](Image)

- **Border Marks**
- **Candidate Number:** 00000000031
- **Supervisor:** Kabahit, Joel
- **Supervisor Role:** Research Supervisor
- **Primary Supervisor:** Y
- **Start Date:** 02/05/2014
- **End Date:**
- **Supervision Percentage:** 100.00
- **Academic Organization:**
- **Advisory Committee:** Graduate Math Admissions Comm
- **Status:** Approved SS
- **Status Date:** 02/10/2014
- **Comment:** Dr Kabahit has been approved as the primary supervisor.

**Attachments**

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Description</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anti_corruption_Certificate.jpg</td>
<td>Anti_corruption_Certificate.jpg Visible</td>
<td>View</td>
</tr>
<tr>
<td>Supervisor_Proposal.doc</td>
<td>Supervisor_Proposal.doc</td>
<td>View</td>
</tr>
</tbody>
</table>

[Return]
To access the Supervisor Details page, go to Candidate Center, My Research Projects region, then click a supervisor name.

**Image: Consumption/Submission Details page**

This example illustrates the fields and controls on the Consumption/Submission Details page.
To access the Consumption/Submission Details page, go to Candidate Center, My Research Projects region, then click a link in the Completion Dates section.

**Image: Thesis Details page**

This example illustrates the fields and controls on the Thesis Details page.

![Thesis Details page screenshot](image_url)
To access the Thesis Details page, go to Candidate Center, My Research Projects region, then click a link in the Thesis Evaluation section.

**Image: Assignment Details page**

This example illustrates the fields and controls on the Assignment Details page.

To access the Assignment Details page, go to Candidate Center, My Research Projects region, then click a link in the Additional Assignments section.

**Candidate Center Service Item Entry Pages**

The following pages provide examples of the various research service items that candidates could initiate. The page titles correspond to the service item link label. The content or fields on these pages vary and are based on the configuration of the service item. Candidates can use the comment field to provide ad hoc notes to administrators. The other fields display current information about the candidate’s record. When
candidates click the Submit button, their records are automatically updated. Candidates can view their updated records in the My Research Projects region.

Image: Research Topic Details — Submit a new research proposal page

This example illustrates the fields and controls on the Research Topic Details — Submit a new research proposal page.
Image: Supervisor Details — Request a supervisor page

This example illustrates the fields and controls on the Supervisor Details — Request a supervisor page.
Image: Assignment Details — Create a new assignment page

This example illustrates the fields and controls on the Assignment Details — Create a new assignment page.
This example illustrates the fields and controls on the Consumption/Submission Details — Update project submission info page.
Understanding Service Requests and Research Service Items

When candidates select a service item that is configured to initiate a:

- Service request, the My Request Detail page opens, which the candidate then fills out. This is different from initiating a service request from the My Service Requests page because candidates do not need to select the category, request type, and subtype. Except for this difference, the service request behavior is the same. The new request will be assigned to an administrator, a notification will be sent to the assigned ID (optional), and the candidate can monitor the status of the request from the My Service Requests page.

- Research service item, based on the information the item will update, for example, the candidate would like to create a new assignment, the corresponding Assignment Details page opens, and the candidate fills out the page. When the page is submitted, the information is used to update the candidate's records, and a notification will be sent to an administrator to notify them of the
event (optional). This results in a new data row in the candidate's records that shows the change. Administrators are able to view this in the Candidate Management or Thesis Management components. Candidates will see this in the My Research Projects region of the Candidate Center.

**Initiating a Research Service Item**

A service item is an action that enables candidates to automatically update specific records. For example, candidates may want to submit a research proposal, request a new supervisor, modify a research topic, and so on.

To update a record, select the appropriate service item from the My Service Items region. A dialog box appears and prompts candidates to enter information. For example, candidates are able to update records pertaining to their research topic, supervisors, consumption, assignments, and thesis.
Example Research Service Item: Submitting a Research Proposal

The following image provides an example of a dialog box that candidates fill out when they want to submit a research proposal.

Image: Research Topic Details dialog box

Research Topic Details dialog box

Creating and Updating Service Requests (Candidates)

Note: Now that research candidates can create service requests from the Candidate Center, you may want to consider disabling the Create button from the My Service Requests page.

Research candidates can create, view and update service requests in self service. To create a service request from the My Service Requests page, a research candidate performs the following steps:

1. Select the request category.
2. Select the request type for the request category.
3. Select the request subtype for the request type (if a subtype is set up for the request type).
4. Enter request details. Add one or more attachments if necessary after entering the request details.
5. Submit the request.

**Pages Used to Create and Update Service Requests (Candidates)**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| My Service Requests   | SSS_RS_VIEW_SR  | Self Service, Research Activities, Service Requests | A candidate can use this page to:
<p>|                       |                 |                                     | - View the list of service requests that he or she has submitted.    |
|                       |                 |                                     | - Select a submitted service request to update it.                   |
|                       |                 |                                     | - Begin creating a new service request.                              |
|                       |                 |                                     | The page displays the status of each submitted service request.      |
| Select a Request Category | SSS_RS_REQCAT  | Click the Create New Request button on the My Service Requests page | Candidate selects the request category for creating a new service request. Examples of request category could be Change related or Library related. |
| Select a Request Type  | SSS_RS_REQTYP   | Click the Next button on the Select a Request Category page. | Candidate selects the request type for creating a new service request. For example, if candidate had selected Library related on the Select a Request Category page, then this page displays the request types set up for Library related request category, such as Library Card and Library Membership. |</p>
<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a Request Subtype</td>
<td>SSS_RS_REQSBT</td>
<td>Click the Next button on the Select a Request Type page.</td>
<td>Candidate selects the request subtype for creating a new service request. For example, if candidate had selected Library Card on the Select a Request Type page, then this page displays the request subtypes set up for Library Card request type, such as Report Lost Library Card and Issue of New Library Card. This page appears only if the institution has set up a subtype for the request type (setting up subtype is optional for an institution). If the institution has not set up a request subtype, and the candidate clicks the Next button on the Select a Request Type page, the My Request Detail page appears for request submission.</td>
</tr>
<tr>
<td>My Request Detail</td>
<td>SSS_RS_CRTE_SR</td>
<td>Click the Next button on the Select a Request Subtype page.</td>
<td>Candidate can enter comments, attach files and submit the service request.</td>
</tr>
<tr>
<td>My Request Detail (View or Update)</td>
<td>SSS_RS_UPDATE_SR</td>
<td>Click the service request link on the My Service Requests page</td>
<td>Candidate can view comments added by the administrator or add and update his or her comments. Candidate can add or view attachments related to the service request.</td>
</tr>
</tbody>
</table>

**Administering Service Requests (Administrators)**

The Service Request Dashboard can be configured to display pagelets that provide: a quick synopsis of information about service requests assigned to an administrator, a complete list of research and academic project candidates where the administrator is a supervisor, and a history of notifications the administrator receives. The administrator can also access the dashboard to update the service requests.

Dashboards are created and maintained in the Portal Registry. They are accessible in the Portal Registry Structure by navigating to the PeopleTools, Portal, Structure and Content page and traversing the menu hierarchy to Portal Objects, Homepage, Tabs. The dashboard is a Content Reference that is added and maintained under the Tabs folder.

For more information, see *PeopleTools: PeopleTools Portal Technology*, Administering Homepages, Dashboard Pages and Pagelet, Understanding Homepages and Dashboard Pages.
Using Service Request Dashboard

Access the Service Request Dashboard (Records and Enrollment, Graduate Research Management, Service Request Dashboard).

The Service Request Dashboard can be configured to display the following pagelets:

- Service Request By Status
- Service Request By Type
- Service Requests
- Assigned Candidates
- Administrator Notifications

Image: Service Request Dashboard

This example illustrates the fields and controls on the Service Request Dashboard. You can find definitions for the fields and controls later on this page.

Service Request By Status

This pagelet provides a bar chart representation of service requests assigned to the administrator by status. When you click a bar (that represents a status), the My Service Requests page appears listing the service requests assigned to the administrator for the particular status. For example, if you click the Received bar, the My Service Requests page appears listing the service requests with Received status.

The Service Request By Status pagelet also has an Academic Institution drop-down list box. This list box enables the administrators to select an institution for which they want to view the service requests by
status. When an administrator selects a different institution in the list box, the pagelet re-renders the bar chart for the selected institution.

**Image:** My Service Requests (Administrator's) page that appears when the bar in the chart is clicked.

This example illustrates the fields and controls on the My Service Requests (Administrator's) page that appears when the bar in the chart is clicked. You can find definitions for the fields and controls later on this page.

### Service Request By Type

This pagelet provides a pie chart representation of service requests assigned to the administrator by service request type. When you click a pie slice (that represents a service request type), the My Service Requests page appears listing the service requests assigned to the administrator for the particular type. For example, if you click the LOA slice, the My Service Requests page appears listing the service requests that have *Leave of Absence* type.

The Service Request By Type pagelet also has an Academic Institution drop-down list box. This list box enables the administrators to select an institution for which they want to view the service requests by Type. When an administrator selects a different institution in the list box, the pagelet re-renders the pie chart for the selected institution.
Service Requests

This pagelet provides a list of all service requests assigned to the administrator. When you click a student, the Service Request Detail page appears where you can update the service request:

Image: Service Request Detail page

This example illustrates the fields and controls on the Service Request Detail page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Status Date</th>
<th>Comment</th>
<th>Status</th>
<th>By</th>
<th>Display to Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/01/2013</td>
<td>Added requested materials for the student to download.</td>
<td>Review in Progress</td>
<td>Julia Wrench</td>
<td></td>
</tr>
<tr>
<td>08/15/2013</td>
<td>I was wrong. We need to send to her.</td>
<td>Review in Progress</td>
<td>Betty Letherby</td>
<td></td>
</tr>
<tr>
<td>08/15/2013</td>
<td>I think the student was already sent the information requested.</td>
<td>Review in Progress</td>
<td>Betty Letherby</td>
<td></td>
</tr>
<tr>
<td>09/15/2013</td>
<td>I'd like some application materials please.</td>
<td>Request Received</td>
<td>Kimberly Adams</td>
<td></td>
</tr>
</tbody>
</table>

add comment

Click this button to open a window for the administrator to enter a comment or private notes. Selecting the Display to Student check box allows the student to view the administrator's comment on their self-service page.

update last comment

The user who entered the original comment can use this button to edit the most recent comment.

reassign

The administrator can use this button to reassign the service request to another person. Once reassigned, the service request disappears from the service request pagelet.

send notification

Click this button to launch the Create Notification page and send notifications.

See "Creating Online Notifications" (PeopleSoft Campus Solutions 9.0: Student Records)
The View All Requests link at the bottom of the Service Requests pagelet enables the administrator to navigate to a page that displays all the service requests assigned to him or her. On this page, the administrator can filter requests by institution or status. In addition, the standard Find feature on the grid header can be used to filter by attributes such as Student Name.

**Assigned Candidates**

This pagelet displays all the research and academic projects where the administrator is the designated supervisor. When you click an ID, you can access either the Candidate Management or Project Management component.

**Notifications**

Administrators can use the Notifications pagelet to view all their notifications generated by the notification framework. By default, the pagelet displays alert notifications because users are likely to have seen their email and SMS notifications on their devices, while alerts currently can only be viewed on the Campus Solutions application pages. Use the Period field to filter notifications for review.

**Note:** When the system assigns a service request to an administrator, the system can be configured to use the Notification Framework to generate a notification to the administrator. The administrator can then act on the service request using this Service Request pagelet on the dashboard or the Service Request Management page. On the Service Request Management page, administrators view or update service requests assigned either to themselves or other administrators. Conversely, administrators can use the dashboard pagelets to view or update service requests only assigned to themselves. The dashboard pagelets do not display service requests assigned to other administrators. Therefore, the Service Request Management page is meant for a higher level of administration.

---

**Searching for Research Topics**

Both research candidates and administrators can use self-service to search for research topics.

**Page Used to Search for Research Topics**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Topic Search</td>
<td>SSS_RS_TPCSRCH1</td>
<td>Self Service, Research Activities, Research Topic Search</td>
<td>A candidate or administrator can use this page to search for research topics.</td>
</tr>
</tbody>
</table>

**Searching for Research Topics**

Access the Research Topic Search page (Self Service, Research Activities, Research Topic Search).

In this page, the simple search provides a keyword search function. Any text entered in the Search field will be used to search against the research topic code, short description, and long description. Clicking the
Advanced Search link enables users to search by research topic code, request category, supervisor, and organization. This example shows the results of a simple search:

**Image: Example of a Simple Search**

This example illustrates the fields and controls on the Example of a Simple Search. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Research Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expand All</strong></td>
</tr>
<tr>
<td>CR0001 Increasing the efficiency of radio waves.</td>
</tr>
<tr>
<td>CR0002 Increasing the precision of radio waves by microprocessor control.</td>
</tr>
<tr>
<td>CR0004 The effect of lower dose radiology treatment on tumors.</td>
</tr>
<tr>
<td>CR0005 The optimization of the intervals between radiology treatments.</td>
</tr>
</tbody>
</table>
This example shows the details of a topic:

**Image: Example of Details of a Topic**

This example shows the details of a Topic.

**Search for Research Topics**

Institution: Peoplesoft University  
Search:  
Advanced Search

**Research Topics**

- CR0001 Increasing the efficiency of radio waves.  
  Increasing the efficiency of radio waves. Radio waves are a type of electromagnetic radiation with wavelengths in the electromagnetic spectrum longer than infrared light. Radio waves have frequencies from 300 MHz to as low as a kHz, and corresponding wavelengths ranging from 1 millimeter (0.039 in) to 100 kilometers (62 mi). Naturally occurring radio waves are made by lightning, or by astronomical objects.

  **Details**
  
  Positions: 3  
  Applicants: 12  
  Program: Electrical Engineering  
  Plan: Engineering Undeclared  
  Degree Earned:

- CR0002 Increasing the precision of radio waves by microprocessor controls.

Chapter 23

Using Delegated Access Self Service

Creating a Proxy and Delegating Access

Delegated access occurs when a person gives another person access to his data. The person who delegates access is known as the delegator. The other person, to whom access is delegated, is known as the proxy. When a proxy is given access, the proxy can then view data or perform some actions on behalf of the delegator.

This section discusses how a delegator gives a proxy access to data or transactions.

Pages Used to Create a Proxy and Delegate Access

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share My Information - Summary</td>
<td>SS_CC_DA_HDR</td>
<td>• Self Service, Share My Information</td>
<td>A delegator uses this page to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Student Center</td>
<td>• Create a proxy, then delegate access to the proxy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Share My Information button on the Student Center page.</td>
<td>• View the list of proxies to whom the delegator has given access.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self-Service, Campus Personal Information, User Preferences</td>
<td>• Delete proxies, or modify proxy details such as changing email address or revoke access to a delegated transaction.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Share My Information link on the User Preferences page.</td>
<td>In the Student Center and User Preferences pages, the Share My Information button or link appears only if the delegator has access to the Share My Information component and has access to at least one delegation transaction defined in the Delegation Transaction Setup page.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Share My Information - Terms and Conditions   | SS_CC_DA_DELEG_AGR | On the Share My Information - Summary page, click the Delegate Access to a New Contact button. | Delegator accepts the academic institution’s terms and conditions.  
Every time a delegator creates a proxy, the delegator must first accept the terms and conditions outlined by the academic institution.                                                                 |
| Share My Information - Details                | SS_CC_DA_DTL    | • On the Share My Information - Terms and Conditions page, click the I Accept button.  
• On the Share My Information - Summary page, click the Edit button. | The delegator uses this page to:  
• Provide information about the proxy.  
• Select the transactions to be delegated to the proxy.  
• Revoke access to a transaction.  
• Modify the name, relationship, or email address of the proxy.  
• Resend the latest email notification. |
Using the Share My Information - Summary Page

Access the Share My Information - Summary page (Self Service, Share My Information).

**Image: Share My Information - Summary Page**

This example illustrates the fields and controls on the Share My Information - Summary Page. You can find definitions for the fields and controls later on this page.

To create a new proxy, click the Delegate Access to a New Contact button.

To edit the proxy details (for example, to revoke access, or to change the email address of the proxy), click the corresponding Edit button. The Share My Information - Details page appears.

To delete the proxy, click the corresponding Delete button. This revokes all transactions delegated to the proxy and the proxy no longer appears on the Share My Information - Summary page. However, the information remains in the records for history purposes.

**Related Links**

"Contact and Transaction Statuses" (PeopleSoft Campus Solutions 9.0: Campus Community)
Accepting the Terms and Conditions

Access the Share My Information - Terms and Conditions page (click the Delegate Access to a New Contact button on the Share My Information - Summary page).

Image: Share My Information - Terms and Conditions Page

This example illustrates the fields and controls on the Share My Information - Terms and Conditions Page. You can find definitions for the fields and controls later on this page.

To modify the terms and conditions, edit the 14025, 60 message catalog.
Providing Proxy Details and Delegating Transactions

Access the Share My Information - Details page (click the I Accept button on the Share My Information – Terms and Conditions page.)

**Image: Share My Information - Details Page**

This example illustrates the fields and controls on the Share My Information - Details Page. You can find definitions for the fields and controls later on this page.

Use this page to provide the proxy’s name, the proxy’s relationship with the delegator, and the proxy’s email address. It is important that the delegator ensures that the email address is correct. The system uses the email address to send an email notification to the proxy. The email notification contains information on how to sign into Campus Solutions, which transactions the proxy has been granted access to, and how to be identified as the right person that has been granted access to the delegator’s data.

The list of transactions show only transactions that the delegator is allowed to delegate. When the delegator selects a transaction name, the system automatically enters the current date as the start date in the transaction grid. The delegator cannot edit this date. To end or revoke a transaction, the delegator must deselect the transactions from the list.

**Related Links**

"Configuring Delegation Transactions" (PeopleSoft Campus Solutions 9.0: Campus Community)

"Notifications Framework and Delegated Access" (PeopleSoft Campus Solutions 9.0: Campus Community)

"Defining Installation Options for New User Registration" (PeopleSoft Campus Solutions 9.0: Campus Community)
Accessing Delegated Transactions

This section discusses how a proxy accesses a transaction that has been delegated.

Pages Used to Access Delegated Transactions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terms and Conditions for Accessing Somebody Else's Data</td>
<td>SS_CC_DA_TERMS_CON</td>
<td>Self Service, Proxy Terms and Conditions</td>
<td>The proxy uses this page to accept the academic institution’s terms and conditions.</td>
</tr>
<tr>
<td>&lt;one or more pages for which access has been delegated to the proxy&gt;</td>
<td>N. A.</td>
<td>Self Service, Shared Information Center</td>
<td>The proxy uses these pages to access the delegated transaction.</td>
</tr>
</tbody>
</table>
Accepting or Declining Terms and Conditions

Access the Terms and Conditions for Accessing Somebody Else's Data page (Self Service, Proxy Terms and Conditions).

Image: Terms and Conditions for Accessing Somebody Else's Data Page

This example illustrates the fields and controls on the Terms and Conditions for Accessing Somebody Else's Data Page.

![Image of Terms and Conditions for Accessing Somebody Else's Data Page]

- **Terms and Conditions**
  
  You have been granted access to view or update data that belongs to somebody else. By accepting these terms and conditions, you consent to protect the privacy of the data and to use or modify the data fairly and lawfully.

  The following terminology applies to these Terms and Conditions: "Delegator" refers to the person who delegated you access. "Proxy" refers to you, the person authorized to view or update the Delegator's data on his or her behalf.

  Agreement:
  - All proxies are required to sign this agreement for each of the delegators that delegated them access to their data confirming their understanding and acceptance of this policy. You sign the agreement by accepting the terms and conditions, entering your Security Key and your email address.

- **I accept terms and conditions**
- **I decline terms and conditions**

- **Security Key**: (Security Key was included inside the email notification you received)
- **Contact Email**: (Email address where email notification was sent to you)

**Your Personal Information**

- **First Name**: 
- **Middle Name**: 
- **Last Name**: 
- **Gender**: 
- **Date of Birth**: 
- **National ID**: 

**Mailing Address**

- **Country**: 
- **Address Line 1**: 
- **Address Line 2**: 
- **Address Line 3**: 
- **City**: 
- **State**: 
- **Postal**: 

**Submit**
Note: The proxy is directly transferred to this page if your institution has implemented the New User Registration framework, and a New User Registration context is embedded in the URL that is used to transfer the proxy to the New User Registration login page.

When the proxy receives the email notification and clicks the enclosed URL, the proxy is transferred to a login page. After registration and authentication, the Terms and Conditions for Accessing Somebody Else's Data page appears. The proxy must provide the security key that is enclosed in the email notification as well as the same email address that was used to send the email notification. These items is used to validate whether the proxy is the correct person to whom access was given. Even if the proxy declines the terms and conditions, the proxy must still provide the security key and the email address.

Optionally, the proxy might be required to enter some personal information. This personal information is stored in the Constituent Transaction Management (CTM) constituent staging tables, and could be used as search data to trigger Search/Match—if a delegated transaction is set up to assign an EMPLID to the proxy. You can define the fields you want to show on this page.

If proxy accepted the terms and conditions and was successfully validated by the system, the role tied to each of the delegated transactions is provisioned to the proxy’s user profile. The proxy is then transferred to the home page and can start viewing or updating the information the proxy has been given access to. The proxy views and updates this information under Self-Service, Shared Information Center. If the proxy declined the terms and conditions, the proxy cannot proceed. Security provisioning does not occur, and all the delegated transactions will be set with a transaction status of Revoked.

It is recommended that you do not deploy this page in a menu navigation because the proxy should not revisit the page once the terms and conditions have been accepted or declined.

To modify terms and conditions text, edit the 14025, 1 message catalog

Related Links
"Step 8: Modifying the Proxy Terms and Conditions Page to Include Proper Constituent Fields " (PeopleSoft Campus Solutions 9.0: Campus Community)
"Delegated Access Validation" (PeopleSoft Campus Solutions 9.0: Campus Community)
"Notifications Framework and Delegated Access" (PeopleSoft Campus Solutions 9.0: Campus Community)
"New User Registration Context" (PeopleSoft Campus Solutions 9.0: Campus Community)

Accessing Delegated Transactions

After accepting the terms and conditions, all the components for which access has been delegated to the proxy appear in Self Service, Shared Information Center.

If multiple delegators have delegated a proxy access to the same component, the component displays a search record that only returns the delegators’ names that granted access to the proxy. For example, Mary has three children who have delegated her access to several transactions. Two of them gave her access to the View My Class Schedule transaction. When Mary accesses the View My Class Schedule component, the search record will return the names of the two children who gave her access to that component.
Chapter 24

Using Self-Service Degree Progress/Graduation

Viewing the Advisement Transcripts Using Self-Service Pages

Your institution can enable users to view advisement transcripts (based on a transcript types) or advisement reports. Advisement reports are based on advisement report types and are also known as the interactive advisement report or My Academic Requirements. We recommend using the advisement reports. Refer to the Using Academic Advisement Self Service documentation for information about how advisors, students, and prospective students can access the advisement reports in self-service.

Note: Advisement transcripts was the advisement report for Campus Solutions pre-9.0 release. With 9.0 release, My Academic Requirements is the advisement report for Campus Solutions.

These topics discuss the advisement transcripts accessible to users, including students and advisors.

The advisement transcripts (often called Degree Progress Reports) are transcripts, specifically an academic advisement transcript. If you want to enable users to generate advisement transcripts, your institution must define advising transcript types for use in self-service using the Define Transcript Type component (SSR_TSCRPT_TYPE).

See "Defining Transcript Types" (PeopleSoft Campus Solutions 9.0: Student Records)

You must also remove access to the component, SAA_SS_DPR_ADB, which is the interactive advisement report (My Academic Requirements).

This section lists the pages used to view the Degree Progress Reports (advisement transcripts) using self-service pages.

Pages Used to View the Advisement Transcripts Using Self-Service Pages

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Progress Report</td>
<td>SS_ES_AARPT_TYPE</td>
<td>Self Service, Degree Progress/Graduation, View Degree Progress Report</td>
<td>Students can request a Degree Progress report by selecting their institution and a report type, and then clicking the Go button.</td>
</tr>
<tr>
<td>Quick What-If Analysis Report</td>
<td>SA_REQST_DTL_SEC3</td>
<td>Click the Quick What-If button on the Degree Progress Report page.</td>
<td>Students can generate a degree progress report based on a what-if program of study.</td>
</tr>
</tbody>
</table>
Applying for Graduation Using Self-Service Pages

This section provides an overview of the self-service application process, lists a prerequisite, and lists the pages used to apply for graduation using self-service pages.

Understanding the Self-Service Application Process

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

Later, degree checkout counselors and academic advisors who are evaluating and approving student applications for graduation can use the Graduation Processing (SSR_RUNCTL_GRADRPT) and Graduation Tracking (SSR_RUNCTL_GRADTRK) component to query and identify a student as part of a larger student population in the system (students with a degree checkout status equal to Applied).

Self-service graduation is set up on the Academic Institution 8, Self Service Options, and Graduation setup pages.

Prerequisite

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

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Apply for Graduation - Submit an Application for Graduation | SSS_GRAD_APPLY | • Self Service, Degree Progress/Graduation, Apply for Graduation  
  • Student Center, My Academics  
  • Click the Apply for Graduation link on the My Academics page. | Students view the academic programs for which they are eligible to apply for graduation. Students can view all active careers and programs. |
| Apply for Graduation - Select Graduation Term | SS_GRAD_APPLY2 | • Self Service, Degree Progress/Graduation, Apply for Graduation  
  • Student selects one program to apply for graduation and an expected graduation term. | Students specify the graduation term for which they are applying. |
| Apply for Graduation - Verify Graduation Data | SS_GRAD_APPLY3 | • Self Service, Degree Progress/Graduation, Apply for Graduation  
  • Click the Continue button after selecting a graduation term. Alternatively, if applicable, select the Select Different Program button. | Students verify the accuracy of a request and then proceed to submit the request. Students also have the option to select a different program (if applicable) or a different term. The graduation review status appears on this page. In addition, students can update their name as it is to appear on the diploma and an address to mail the diploma. |
| Apply for Graduation - Graduation Application Status | SS_GRAD_APPLY4 | • Self Service, Degree Progress/Graduation, Apply for Graduation  
  • Click the Submit Application button on the Apply for Graduation - Verify Graduation Data page. | Students receive confirmation from the system that their application for graduation was submitted successfully. |

**Related Links**

Setting Up Self-Service Features for Student Records
Chapter 25

Using Student Financials Self Service

Understanding Student Financials Self Service

Students use Student Financials self service to view outstanding charges, payments, financial aid, and refunds; create and store credit card or eCheck payment profiles; make self-service payments, purchase miscellaneous items, and use account services. What students see when they access Student Financials self service depends on what your institution has defined on the setup pages. For example, you can use Institution Sets to specify not only that students view their account activity by business unit, term, or charge, but you can also decide whether to display payment history, pending payments, charges due, and financial aid totals.

See Setting Up Institution Sets.

The navigation tabs that are used in Student Financials self service are defined on the Navigation Tabs Setup page.

Related Links
Setting Up Self-Service Navigation

Viewing Outstanding Charges, Payments, Financial Aid, and Refunds

This section discusses how to:

- View an account summary.
- View account activity.
- View charges due details.
- View details by due date.
- View details by charge.
- View charges due details by due date.
- View invoices due detail.
- View invoice detail.
- View payment history.
- View the charges paid by a payment.
• View pending financial aid.

**Pages Used to View Outstanding Charges, Payments, Financial Aid, and Refunds**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Inquiry - Account Activity</td>
<td>SSF_SS_ACCT_ACTVTY</td>
<td>Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity</td>
<td>Click the Activity link or a tab on any page. Review all of the account activity that has transpired over a fixed period of time. Account activity can include any transactions that have been posted to the student's account, including charges, cash, checks, credit card payments, financial aid, refunds, and so on. Administrators can suppress this page from appearing using the SF Institution Set setup.</td>
</tr>
<tr>
<td>Account Inquiry - Charges Due</td>
<td>SSF_SS_CHRGS_DUE</td>
<td>• Self Service, Campus Finances, Account Inquiry, Account Inquiry - Charges Due</td>
<td>Review all outstanding charges and deposits incurred to date, including charge details. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.</td>
</tr>
<tr>
<td>Account Inquiry - Charges Due</td>
<td>SSF_SS_CHRGS_DUE</td>
<td>• Click the Charges Due link or a tab on any page.</td>
<td>Review all outstanding charges and deposits incurred to date, including charge details. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.</td>
</tr>
<tr>
<td>Account Inquiry - Payment History</td>
<td>SSF_SS_PMT_HIST</td>
<td>Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments</td>
<td>Review all payments posted to the account. Administrators can suppress this page from appearing to the student using the SF Institution Set setup. Administrators can select whether pending payments will appear on this page and whether students are permitted to drill down through posted payments to see which charges were reduced by those payments.</td>
</tr>
<tr>
<td>Account Inquiry - Pending Financial Aid</td>
<td>SSF_SS_PEND_FINAID</td>
<td>Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid</td>
<td>Review pending or anticipated aid that has yet been posted to the account. Pending financial aid amounts can be viewed by all terms or by specific terms. Administrators can suppress this page from appearing to the student using the SF Institution Set setup.</td>
</tr>
</tbody>
</table>
Viewing an Account Summary

Access the Account Inquiry - Account Summary page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Summary).

Image: Account Inquiry - Account Summary page

This example illustrates the fields and controls on the Account Inquiry - Account Summary page. You can find definitions for the fields and controls later on this page.

Lauretta Lewis

Account Inquiry | Electronic Payments/Purchases | Account Services
---|---|---
summary | activity | charges due | payments | pending aid

**Account Summary**

You owe 5,629.00. For the breakdown, access Charges Due

- Due Now: 5,629.00
- Future Due: 0.00

**You have a past due balance of 5,629.00.**

**What I Owe**

<table>
<thead>
<tr>
<th>Campus</th>
<th>Term</th>
<th>Outstanding Charges &amp; Deposits</th>
<th>Pending Payments</th>
<th>Pending Financial Aid</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS University</td>
<td>2005 Fall</td>
<td>5,629.00</td>
<td></td>
<td></td>
<td>5,629.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>5,629.00</strong></td>
<td></td>
<td></td>
<td><strong>5,629.00</strong></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

**Remittance Addresses**

Financial Aid

**Account Inquiry** | **Electronic Payments/Purchases** | **Account Services**
---|---|---
Summary | Activity | Charges Due | Payments | Pending Aid
[go to ...]

**Charges Due**

Click to access the Charges Due page.

**Due Now and Future Due**

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

**Past Due Balance**

This amount represents charges that were incurred through yesterday (current date minus 1).
See Defining Basic Institution Set Parameters.

**What I Owe Table**

The columns that appear in the What I Owe table are based on the allocation level that you specified on the Institution Set page. An administrator can suppress the Pending Payments and Pending Financial Aid columns.

**Remittance Addresses**

The address that appears is based on the location that you selected on the SF Business Unit page.
Viewing Account Activity

Access the Account Inquiry - Account Activity page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Account Activity).

**Image: Account Inquiry - Account Activity page**

This example illustrates the fields and controls on the Account Inquiry - Account Activity page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Account Inquiry</th>
<th>Electronic Payments/Purchases</th>
<th>Account Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>summary</td>
<td>activity</td>
<td>charges due</td>
</tr>
<tr>
<td></td>
<td></td>
<td>payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>pending aid</td>
</tr>
</tbody>
</table>

**Account Activity**

**View by**

PS University  
From 12/09/2005  
To 06/09/2006  
All Terms  
Go

<table>
<thead>
<tr>
<th>Transactions</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1-10 of 11</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Posted Date</strong></td>
<td><strong>Item</strong></td>
<td><strong>Term</strong></td>
<td><strong>Charge</strong></td>
<td><strong>Payment</strong></td>
<td><strong>Refund</strong></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>Administrative Fees</td>
<td>2006 Spring Qtr</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>Book Fees</td>
<td>2006 Spring Qtr</td>
<td>5.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>Credit Card - Self Service</td>
<td>2006 Spring Qtr</td>
<td>29.95</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>GST Tax</td>
<td>2006 Spring Qtr</td>
<td>347.39</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>GST Tax</td>
<td>2006 Spring Qtr</td>
<td>347.39</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>Gym Fees</td>
<td>2006 Spring Qtr</td>
<td>3.04</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2006</td>
<td>PST Tax</td>
<td>2006 Spring Qtr</td>
<td>2.80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

**Financial Aid**

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

Access the Account Inquiry - Charges Due page (Self Service, Campus Financials, Account Inquiry, Account Inquiry - Charges Due).

Image: Account Inquiry - Charges Due page (1 of 2)

This example illustrates the fields and controls on the Account Inquiry - Charges Due page (1 of 2). You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Scored Lewis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Inquiry</strong></td>
</tr>
<tr>
<td>summary</td>
</tr>
</tbody>
</table>

Charges Due

Following is a Running Totals summary by due date of the charges and deposits that you owe. Review either the Details by Due Date table or the Details by Charge table to see the specific charges.

<table>
<thead>
<tr>
<th>Summary of Charges by Due Date</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1-2 of 2</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Due Amount</td>
<td>Running Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/09/2005</td>
<td>2,814.50</td>
<td>2,814.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/24/2005</td>
<td>2,814.50</td>
<td>5,629.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Details by Due Date

Currency used is US Dollar.
This example illustrates the fields and controls on the Account Inquiry - Charges Due page (2 of 2). You can find definitions for the fields and controls later on this page.

**Details by Charge**

Expand this region to view charge details by due date.

**Details by Charge**

Expand this region to view charge details. Students can filter these by term.

**Invoices Due**

Expand the Invoice Due region to view invoice details.
**Viewing Details by Due Date**

**Note:** The system displays charges by date within a term.

**Image: Details by Due Date region**

This example illustrates the Details by Due Date region.

```
<table>
<thead>
<tr>
<th>Due Date</th>
<th>Charge</th>
<th>Term</th>
<th>Due Amount</th>
<th>Running Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2005</td>
<td>Tuition</td>
<td>2005 Fall</td>
<td>2,314.50</td>
<td>2,314.50</td>
</tr>
<tr>
<td>09/24/2005</td>
<td>Tuition</td>
<td>2005 Fall</td>
<td>2,814.50</td>
<td>5,129.00</td>
</tr>
</tbody>
</table>
```

Currency used is US Dollar.

**Viewing Details by Charge**

**Image: Details by Charge region**

This example illustrates the Details by Charge region.

```
<table>
<thead>
<tr>
<th>Charge</th>
<th>Due Date</th>
<th>Term</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>multiple</td>
<td>2005 Fall</td>
<td>5,129.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.
```

The system displays charges based on the selection in the View By field.

**View By**

*Filter the charges due by campus and by term.*

**multiple**

*If a charge has multiple due dates, click this link to check those dates.*
Viewing Charges Due Details by Due Date

This example illustrates viewing charges due details by due date.

**Detail By Charge**

**Tuition**

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Due Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2005</td>
<td>2314.50</td>
</tr>
<tr>
<td>09/24/2005</td>
<td>2814.50</td>
</tr>
</tbody>
</table>

Return to Charges Due

Viewing Invoices Due Detail

This example illustrates the Invoices Due region.

View information about invoices that are due.

**Viewing Invoice Detail**

This example illustrates viewing invoice detail.

**Invoice Detail**

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Date Posted</th>
<th>Item Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>08/30/2005</td>
<td>2,814.50</td>
</tr>
<tr>
<td>Tuition</td>
<td>08/30/2005</td>
<td>2,814.50</td>
</tr>
</tbody>
</table>

Return to Charges Due
### Viewing Payment History

Access the Account Inquiry - Payment History page ((Self Service, Campus Finances, Account Inquiry, Account Inquiry - Payments).

**Image: Account Inquiry - Payment History page**

This example illustrates the fields and controls on the Account Inquiry - Payment History page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>View By</th>
<th>PS University</th>
<th>From 12/09/2005</th>
<th>To 06/09/2006</th>
<th>go</th>
</tr>
</thead>
</table>

#### Posted Payments

<table>
<thead>
<tr>
<th>Date Paid</th>
<th>Payment Type</th>
<th>Paid Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/08/2006</td>
<td>eCheck Credit Card Item Type - Ref # 0000000000008</td>
<td>505.00</td>
</tr>
<tr>
<td>06/08/2006</td>
<td>Credit Card - Self Service - Ref # 000000000009</td>
<td>347.39</td>
</tr>
<tr>
<td></td>
<td>Total Posted Payments for this view</td>
<td>852.39</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

#### Pending Payments

<table>
<thead>
<tr>
<th>Date Paid</th>
<th>Reference Nbr</th>
<th>Account Number</th>
<th>Payment Type</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/08/2006</td>
<td>000000000010</td>
<td>005</td>
<td>Credit Card</td>
<td>1,005.00</td>
</tr>
<tr>
<td>05/08/2006</td>
<td>000000000007</td>
<td>005</td>
<td>Credit Card</td>
<td>1,005.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total Pending Payments</td>
<td>2,010.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

#### Financial Aid

Students can filter all posted and pending payment activity by date.
**Paid Amount**

Click to view the specific charges paid by this payment.

### Viewing the Charges Paid by a Payment

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

**Image: Payment History - Charges Paid by this Payment page**

This example illustrates the fields and controls on the Payment History - Charges Paid by this Payment page. You can find definitions for the fields and controls later on this page.

---

### Payment History - Charges Paid by this Payment

<table>
<thead>
<tr>
<th>06/08/2006 eCheck Credit Card Item Type</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Payment Breakdown</th>
<th>Term</th>
<th>Applied Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>2005 Fall</td>
<td>500.00</td>
</tr>
<tr>
<td>Administrative Fees</td>
<td>2006 Spring Qtr</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Total Payment Amount</strong></td>
<td></td>
<td><strong>505.00</strong></td>
</tr>
</tbody>
</table>

---

**Return to Payment History**

Click the Return to Payment History link to return to the previous page.
Viewing Pending Financial Aid

Access the Account Inquiry - Pending Financial Aid page (Self Service, Campus Finances, Account Inquiry, Account Inquiry - Pending Financial Aid).

Image: Account Inquiry - Pending Financial Aid page

This example illustrates the fields and controls on the Account Inquiry - Pending Financial Aid page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Lauretta Lewis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Inquiry</td>
</tr>
<tr>
<td>summary</td>
</tr>
</tbody>
</table>

Viewing Pending Financial Aid

Pending Financial Aid

You have no pending financial aid at this time.

Financial Aid

View pending financial aid amounts by all terms or by specific terms.

Click to access financial aid information.

See Understanding Financial Aid Self-Service.

Creating Payment Profiles

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

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

Understanding Self-Service Payment Profiles

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

**Note:** Payment Profile functionality is not available if you use a hosted payment solution to process your ePayment transactions. Student Financials supports Payment Profiles for customers using non-hosted payment including both Integration Broker and Business Interlink solutions.

### Understanding Payment Profile Setup

Use the Self Service Payment Profile check box on the SF Installation 2 page to determine whether to allow students to create, save, and use payment profiles. When the check box is selected, existing self-service payment profiles are retained and students can create and save new profiles.

**Note:** Clearing the check box does not automatically prevent students from creating and maintaining profiles—you must also run the SSF_PPROFDEL process and remove the Payment Profile component from all permission lists—as documented in the setup topics.

See "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.0: Student Financials).

If you clear the Self Service Payment Profile check box on the SF Installation 2 page, run the SSF_PPROFDEL process, and remove the Payment Profile component from all permission lists:

- The Payment Profile component is not available in Self Service.

- The payment profile tab and payment profile details are not available on any pages in the Make a Payment component or the Purchase Miscellaneous Items component.

  Payment profile buttons do not appear on the Make a Payment - Specify Payment Details page or the Purchase Items - Specify Payment Details page. Students cannot save a payment profile or use an existing profile during the payment transaction.

  Payment profile details do not appear in the Confirmation Details section on the Make a Payment – Payment Result page.

### Pages Used to Create Self-Service Payment Profiles

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Payments/Purchases - Payment Profile - Payment Profile Summary</td>
<td>SS_SF_ACCT_PROFILE</td>
<td>Self Service, Campus Finances, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary</td>
<td>View payment profiles. If students have established profiles, they appear here.</td>
</tr>
<tr>
<td>Electronic Payments/Purchases - Payment Profile - Profile Detail</td>
<td>SS_SF_ACCT_PRFL_D</td>
<td>Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Profile Detail. Click the link of the appropriate profile.</td>
<td>View payment profiles.</td>
</tr>
</tbody>
</table>
Adding and Deleting Payment Profiles

Access the Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page ((Self Service, Campus Finances, Payment Profile, Electronic Payments/Purchases - Payment Profile - Payment Profile Summary).

Image: Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page

This example illustrates the fields and controls on the Electronic Payments/Purchases - Payment Profile - Payment Profile Summary page. You can find definitions for the fields and controls later on this page.

If a student has not yet created a payment profile, the table is empty. Click the Add A Profile button to create a payment profile.

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

Profile Type
Indicates whether the profile is for an Electronic Check or Credit Card account.
Edit Profile  
Click to access an editable version of the Payment Profile - Payment Profile Summary page.

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

Add a Profile  
Click to add a new payment profile.
Viewing and Editing Payment Profile Details

Access the Electronic Payments/Purchases - Payment Profile - Profile Detail page (Self Service, Campus Finances, Payment Profile, Payment Profile - Profile Detail and click the link of the appropriate profile).

**Image: Electronic Payments/Purchases - Payment Profile - Profile Detail page**

This example illustrates the fields and controls on the Electronic Payments/Purchases - Payment Profile - Profile Detail page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Lauretta Lewis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Inquiry</strong></td>
</tr>
<tr>
<td><strong>Electronic Payments/Purchases</strong></td>
</tr>
<tr>
<td><strong>Account Services</strong></td>
</tr>
</tbody>
</table>

**Payment Profile**

**Profile Detail**

- **Description**: LewisCC 005
- **Short Description**: CC 005
- **Profile Type**: Credit Card
- **First Name**: Lauretta
- **Last Name**: Lewis
- **Email Address**: ps@ps.com
- **Telephone**: 123 4567890

**Credit Card**

- **Credit Card Type**: American Express
- **Card Number**: 378282246310005
- **Expiration Date**: 09 / 2008

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

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

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

**Credit Card**
Select the credit card type and enter the credit card number and expiration date.

**Editing or Deleting Payment Profile Details**
Access the Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page (click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile).
The credit card type and credit card number are read-only, and the card number is masked.

**Image: Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page**

This example illustrates the fields and controls on the Electronic Payments/Purchases - Payment Profile - Edit Payment Profile page. You can find definitions for the fields and controls later on this page.

---

**Making Self-Service Payments**

This section provides an overview of self-service payments, lists prerequisites, and discusses how to:

- Specify payment amounts.
- Select payment methods.
- Redirect to hosted payment site.
- Specify payment details (hosted payment).
• Specify payment details (non-hosted payment).
• Confirm payments (hosted and non-hosted payments).
• View successful payment results (hosted and non-hosted payments).
• View declined payment results (hosted and non-hosted payments).

Understanding Self-Service Payments

The self-service feature of PeopleSoft Student Financials enables students to access their account information and make payments over the internet. The self-service pages can be accessed from the Student Center, the Account Inquiry page, or the menu navigation.

Self-Service Account Review

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

Total Due Charges Review

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

Self-Service Payments

The Make a Payment self-service component (SSF_SS_PAYMENT) enables students to make electronic payments toward their account, using credit card or eCheck depending on the form of payment that your institution accepts. Additionally, if you set up your institution to allow it, students can allocate their self-service payments to specific charges.

The Make a Payment pages appear and function differently depending on whether you use the hosted payment feature.

If you use the hosted payment feature for self-service ePayment transactions, the step numbers that represent the number of pages or steps required to complete the transaction do not appear on the Make a Payment pages because part of the transaction is performed on the external hosted payment provider site. The numbers appear on the pages if you do not use hosted payment.

Note: If your setup allows for the charges that are payable by credit card to be different from the charges that are payable by electronic check, the Select Payment Method page appears before the Specify Payment Amount page. If the charge priority is the same for credit card and electronic check, the Specify Payment Amount page appears first because it does not change regardless of the payment method that the student selects. The order of appearance of the pages is the same whether you use hosted or non-hosted payment.

See:
• "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.0: Student Financials)
• Understanding Self-Service Payment Profiles
• Electronic Payment Integration Developer's Reference Guide. The guide is posted to My Oracle Support, ID 968171.1.

**Note:** Whether payment profile functionality is available in the Make a Payment component depends on your self-service setup and also on whether you use hosted payment.

**Messaging**

The PeopleSoft application delivers a set of messages that accompany many of the self-service pages. These messages are intended to help students through the self-service experience. These messages are user-defined in the Message Catalog, and they can be modified by an administrator. They appear at the top of most pages. For instance, if a student is paying with an eCheck, then the student receives the following message about his or her Personal Identification Number (PIN) as a potential requirement for user authentication: *You will need your PIN in order to submit an eCheck Transaction.* Messages can be changed only by an administrator.

**Prerequisites**

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

See:

- "Setting Up Payment Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials)
- Setting Up Institution Sets
- "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials)

**Pages Used to Make Self-Service Payments**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Payments/ Purchases - Make a Payment - Specify Payment Amount</td>
<td>SSF_SS_PMT_ALLOC</td>
<td>Self Service, Campus Finances, Make a Payment, Electronic Payments/ Purchases - Make a Payment</td>
<td>Specify the amount to pay toward outstanding charges.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Make a Payment - Select Payment Method</td>
<td>SSF_SS_PMT_METHOD</td>
<td>Click the Next button on the Make a Payment - Specify Payment Amount page.</td>
<td>Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Electronic Payments/</td>
<td>SSF_SS_PMT_MSG</td>
<td>For hosted payment only:</td>
<td>Advise students that their payments will be collected through a third</td>
</tr>
<tr>
<td>Purchases - Make a Payment</td>
<td></td>
<td>Click the Next button on the</td>
<td>party provider.</td>
</tr>
<tr>
<td>- Confirm Payment</td>
<td></td>
<td>Make a Payment - Select Payment Method page.</td>
<td>When a student clicks the</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Continue to Make Payment button, the student is transferred to the</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>third party site to input credit card or eCheck details.</td>
</tr>
<tr>
<td>Electronic Payments/</td>
<td>SSF_SS_PMT_CR_CARD</td>
<td>For non-hosted payment only:</td>
<td>Specify either the credit card</td>
</tr>
<tr>
<td>Purchases - Make a Payment</td>
<td></td>
<td>Click the Next button on the</td>
<td>or eCheck payment details for</td>
</tr>
<tr>
<td>- Specify Payment Details</td>
<td></td>
<td>Make a Payment - Select Payment Method page.</td>
<td>the current transaction.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is a Security Code</td>
<td>SSF_CVV_ABOUT</td>
<td>Click the What is a Security Code? link on the Make a Payment - Specify</td>
<td>Access information about the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Payment Details page.</td>
<td>Security Code that is located</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>on credit cards.</td>
</tr>
<tr>
<td>Electronic Payments/</td>
<td>SSF_SS_PMT_SUBMIT</td>
<td>For non-hosted payment, click</td>
<td>Confirm payment details.</td>
</tr>
<tr>
<td>Purchases - Make a Payment</td>
<td></td>
<td>the Next button on the Make a Payment - Specify Payment Details page.</td>
<td>This page appears differently for hosted and non-hosted payments.</td>
</tr>
<tr>
<td>- Confirm Payment</td>
<td></td>
<td>For hosted payment, click</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continue from the third party site.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic Payments/</td>
<td>SSF_SS_PMT_RESULT</td>
<td>Click the Submit button on the</td>
<td>View successful and declined</td>
</tr>
<tr>
<td>Purchases - Make a Payment</td>
<td></td>
<td>Make a Payment - Confirm Payment page.</td>
<td>payment results.</td>
</tr>
<tr>
<td>- Payment Result</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Specifying Payment Amounts**

The transaction flow that is discussed here assumes that charge priorities for credit card and echeck are the same—therefore, the Make a Payment - Specify Payment Amount page appears first.
Access the Make a Payment - Specify Payment Amount page (Self Service, Campus Finances, Make a Payment, Electronic Payments/Purchases - Make a Payment).

**Image: Make a Payment - Specify Payment Amount page**

This example illustrates the fields and controls on the Make a Payment - Specify Payment Amount page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Stephanus Zrossi</th>
</tr>
</thead>
<tbody>
<tr>
<td>make a payment</td>
</tr>
<tr>
<td>Electronic Payments/Purchases</td>
</tr>
</tbody>
</table>

**Make a Payment**

**Specify Payment Amount**

Listed below are the charges you are allowed to pay online. Your other charges can be paid through the Cashiers office or mailed in separately.

A 2% convenience fee will be added to your Credit Card payment. A 5.00 USD convenience fee will be added to your eCheck payment.

**What I Owe**

<table>
<thead>
<tr>
<th>Description</th>
<th>Outstanding Charges</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Future PSUNV Charges</td>
<td>0.00</td>
<td>100</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

This page is the same for hosted and non-hosted payment modes, except that a message about a PIN being required for eCheck transactions appears for non-hosted payment.

**What I Owe Table**

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

<table>
<thead>
<tr>
<th>Payment Amount</th>
<th>Enter different amounts for each of the charges that appear.</th>
</tr>
</thead>
<tbody>
<tr>
<td>pay all charges</td>
<td>Click to pay all charges listed.</td>
</tr>
<tr>
<td>zero out amounts</td>
<td>Click to zero out amounts in the Payment Amount fields.</td>
</tr>
<tr>
<td>calculate total</td>
<td>Click to calculate the amounts in the Payment Amount fields.</td>
</tr>
</tbody>
</table>
Charges Due Table

The Charges Due table appears only if the Display Charges Due check box is selected on the SF Institution Set setup. The Charges Due table is based on what your institution defined in the setup. If the allocation level that you specified on the Institution Set page is *By Business Unit*, the charge details will be grouped by business unit. If the allocation level that you specified on the Institution Set page is *By Term*, the charge details will be grouped by term within the business unit.

**Multiple**

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

Selecting Payment Methods

Access the Make a Payment - Select Payment Method page (click the Next button on the Make a Payment - Specify Payment Amount page).

**Image: Make a Payment - Select Payment Method page**

This example illustrates the fields and controls on the Make a Payment - Select Payment Method page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Stephanus Zrossi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Inquiry</td>
</tr>
<tr>
<td>make a payment</td>
</tr>
</tbody>
</table>

Make a Payment

Select Payment Method

If you wish to use multiple credit cards or bank accounts to pay off your balance, you will need to submit multiple transactions.

A 2% convenience fee will be added to your Credit Card payment. A 5.00 USD convenience fee will be added to your eCheck payment.

<table>
<thead>
<tr>
<th>Pay By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card</td>
</tr>
</tbody>
</table>

This appearance of this page is the same for hosted and non-hosted payment modes.

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

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

**Related Links**

- Defining Basic Institution Set Parameters
- "Defining Miscellaneous Parameters for Item Types" (PeopleSoft Campus Solutions 9.0: Student
  Financials)

**Redirecting to Hosted Payment Site**

This section applies only if you use hosted payment mode.

If you use hosted payment, after a student selects a payment method and clicks NEXT on the Make a
Payment - Select Payment Method page, the Make a Payment - Confirm Payment page appears.
Access the Make a Payment - Confirm Payment page (for hosted payment only: click the Next button on the Make a Payment - Select Payment Method page).

**Image: Make a Payment - Confirm Payment page**

This example illustrates the fields and controls on the Make a Payment - Confirm Payment page. You can find definitions for the fields and controls later on this page.

### Specify Payment Details (Hosted Payment)

This section applies to hosted payment only.

When the student clicks the Continue to Make Payment button, information about the payment is sent to the third party Payment provider, and the student is transferred to the third party site to input the credit card or eCheck details.
Here is an example page:

**Image: Sample third party page**

This is an example of a third party page.

![Make a Payment](Image)

Please enter the following information as it appears on your card.

- **Credit Card Type**: Visa
- **Credit Card Number**
- **Expiration Date**: 10/2012
- **Security Code**
- **Cardholder Name**

[Cancel] [Continue]

The student enters payment details on the third party hosted site. The student clicks Continue to return to Campus Solutions. Authorization does not occur here. Buttons and images on the page might be configurable at the third party site.
If the student clicks Cancel from the third party hosted site, the student is taken to a page in self-service Make a Payment which displays a message advising that the payment is canceled:

**Image: Make a Payment page: Canceled payment**

This example illustrates the fields and controls on the Make a Payment page: Canceled payment. You can find definitions for the fields and controls later on this page.

The payment status is updated to Canceled. Similarly, if an error occurs, the student is taken to the Payment Result page and the payment status is updated to Error.

**Specifying Payment Details (Non-Hosted Payment)**

This section applies to non-hosted payment only.
Access the Make a Payment - Specify Payment Details page (for non-hosted payment only: click the Next button on the Make a Payment - Select Payment Method page).

**Image: Make a Payment - Specify Payment Details page**

This example illustrates the fields and controls on the Make a Payment - Specify Payment Details page. You can find definitions for the fields and controls later on this page.

If a student has not created a payment profile before accessing this page, the student must create one from this page to be able to enter or confirm ePayment information.

Payment Profile options are only available if the Self Service Payment Profile check box is selected on the SF Installation 2 page (Set Up SACR, Install, Student Fin Installation, SF Installation 2).

See "Defining Keyword Edit Tables and a Null Due Date" (PeopleSoft Campus Solutions 9.0: Student Financials).

**Create New Profile, Use Existing Profile, Do not use Profile, and Save Payment Profile**

Select one of these options, depending on whether a payment profile was already created.

If the Use Existing Profile option is selected, the student cannot update the credit card type, credit card number, account type or account number. Account specific date can only be entered if the student selects one of the following options, Create New Profile or Do not use Profile.
You can also use this attribute to update an existing Payment Profile as part of successfully transmitting an ePayment transaction.

**Payment Profile**

If a student has created a payment profile, select it from the Payment Profile drop-down list box.

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

### Credit Card Details

**First Name and Last Name**
Enter the first and last name on the bank account.

**Credit Card Type**
Select the type of credit card to use. The type of credit card is masked.

*Note:* The type of credit card is masked.

**Credit Card Number**
Enter the credit card number.

*Note:* The credit card number is masked.

**Expiration Year and Date**
Enter the expiration year and date for the credit card.

**Security Code**
Enter the Security Code that is located on the credit card.

It is a security feature for "card not present" transactions such as Internet transactions.

The Security Code field is available if the Security Code Required check box is selected on the SF Merchants page.

See "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.0: Student Financials).

**What is a Security Code?**
Click this link to access the What is a Security Code page.

**Telephone**
Enter the telephone number.

**Country and Address**
Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.

**Edit Address**
Click to change the address for the current ePayment transaction.

### eCheck Account Details

**First Name and Last Name**
Enter the first and last name on the bank account.

**Bank Account Type**
Select the type of bank account to use.

**Routing Number**
Enter the routing number for the bank account.
Account Number

Enter the account number for the bank account. The eCheck account number is masked.

Telephone

Enter the telephone number.

Country and Address

Based on the Address Usage option and the student's address table, the system retrieves the appropriate address.

Edit Address

Click to change the address for the current ePayment transaction.

Privacy Policy

This link is available if the Display Privacy Policy check box is selected on the Electronic Payments page (Set Up SACR, Common Definitions, Self Service, Student Financials, SF Institution Set, Electronic Payments).

Confirming Payments (Hosted and Non-Hosted Payments)

The Make a Payment - Confirm Payment page confirms the payments that students want to submit. The information that appears in the Payment Summary region reflects whether students made payments by credit card or eCheck.

Information that is not collected, such as address and email, does not appear on this page.

The page appears differently for hosted and non-hosted payment modes.
Hosted Payment Mode

Access the Make a Payment - Confirm Payment page (for non-hosted payment, click the Next button on the Make a Payment - Specify Payment Details page. For hosted payment, click Continue from the third party site).

Image: Make a Payment - Confirm Payment page (hosted payment)

This example illustrates the fields and controls on the Make a Payment - Confirm Payment page (hosted payment). You can find definitions for the fields and controls later on this page.

In hosted payment mode, the change payment amount and change payment details buttons are not available. Only the CANCEL and SUBMIT buttons are available to the student. The student cannot make changes to the amount or payment details (credit card or bank account information) because of the external third party provider relationship.

Depending on the third party provider, only the last 4 digits of the credit card number or bank number might be retrieved from the third party payment provider and displayed to the student prior to the authorization. Whether this information appears on the Confirm Payment page depends on whether the third party provider sends the information to Student Financials.

Where possible, after the payment is authorized, the credit card type and bank account type are stored by Student Financials in the database, as it is a valuable reconciliation tool.
If a student clicks the CANCEL button, the payment is already saved as Initiated even if the student clicks YES to confirm the cancellation action.

**Non-Hosted Payment Mode**

In non-hosted payment mode, more information, such as student details, appear on the page, and a student can change payment amount or details using the change payment amount and change payment details buttons.

If a student clicks the CANCEL button, and then clicks Yes to confirm the cancellation action, the payment is not saved.

Here is an example of the page in non-hosted mode:

**Image: Make a Payment - Confirm Payment page (non-hosted payment)**

This example illustrates the fields and controls on the Make a Payment - Confirm Payment page (non-hosted payment). You can find definitions for the fields and controls later on this page.
Viewing Successful Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page (click the Submit button on the Make a Payment - Confirm Payment page).

Image: Make a Payment - Payment Result

This example illustrates the fields and controls on the Make a Payment - Payment Result. You can find definitions for the fields and controls later on this page.

The page appears the same in hosted payment and non-hosted payment modes, except that in hosted mode, a payment profile is not created and displayed on the page.

View Confirmed Payment  Click to go to the Payments tab to verify the recently submitted transaction. This button is available only following a successfully submitted transaction.

Make Another Payment  Click to start the Make a Payment process from the beginning.
Viewing Declined Payment Results (Hosted and Non-Hosted Payments)

Access the Make a Payment - Payment Result page (click the Submit button on the Make a Payment - Confirm Payment page).

**Image: Make a Payment - Payment Result page (payment declined)**

This example illustrates the fields and controls on the Make a Payment - Payment Result page (payment declined). You can find definitions for the fields and controls later on this page.

In hosted payment mode, the RESUBMIT PAYMENT button is not available. The student can only make a new payment.

**Resubmit Payment**
This button is available only in non-hosted payment mode.

Click to review and edit the retained payment data. To start over, click Make Another Payment.

**Make Another Payment**
Click to begin the Make a Payment process from the beginning.

Purchasing Miscellaneous Items

Your institution may provide access to students and others to select and purchase miscellaneous items or services outside of the regular tuition and fees calculated by Tuition Calculation. After selecting and purchasing these items or services, you will be routed to Make a Payment pages, where the transaction will be completed.

This section discusses how to:
• Purchase miscellaneous items.
• Select items.
• Confirm an order.
• Make a payment.

**Note:** Whether payment profile functionality is available in the Purchase Miscellaneous Items component depends on your self-service setup and on whether you use hosted payment.

See **Understanding Self-Service Payment Profiles**.

See "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.0: Student Financials).

**Note:** Using hosted payment does not impact how you select items for purchase. However, the payment process for purchasing miscellaneous items is different depending on whether you use hosted or non-hosted payment. Refer to the Making Self-Service Payments section.

See **Making Self-Service Payments**.

### Pages Used to Purchase Miscellaneous Items

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Select Campus</td>
<td>SSF_SS_BU_SELECT</td>
<td>• Self Service, Campus Finances, Purchase Miscellaneous Items - Select Campus • Access step 1 of the Purchase Items Wizard.</td>
<td>Select the campus from which to make a purchase.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Select Items</td>
<td>SSF_SS_MISC_PUR</td>
<td>• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus Click the Next button. • Access step 2 of the Purchase Items Wizard.</td>
<td>Enter the quantity of the purchased items.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Confirm Order</td>
<td>SSF_SS_PMT_ITMCONF</td>
<td>• Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items Click the Next button. • Access step 3 of the Purchase Items Wizard.</td>
<td>Verify the amount and total of the items to be purchased.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items- Select Payment Method</td>
<td>SSF_SS_PMT_METHOD</td>
<td>Click the Next button on the Purchase Items - Confirm Order page</td>
<td>Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Confirm Payment</td>
<td>SSF_SS_PMT_MSG</td>
<td>For hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.</td>
<td>Advise students that their payments will be collected through a third party provider. When a student clicks the Continue to Make Payment button, the student is transferred to the third party site to input credit card or eCheck details.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Specify Payment Details</td>
<td>SSF_SS_PMT_CR_CARD</td>
<td>For non-hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.</td>
<td>Specify either the credit card or eCheck payment details for the current transaction.</td>
</tr>
<tr>
<td>What is a Security Code</td>
<td>SSF_CVV_ABOUT</td>
<td>Click the What is a Security Code? link on the Purchase Items - Specify Payment Details page.</td>
<td>Access information about the Security Code that is located on credit cards.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items- Confirm Payment</td>
<td>SSF_SS_PMT_SUBMIT</td>
<td>For non-hosted payment, click the Next button on the Purchase Items - Specify Payment Details page.</td>
<td>Confirm payment details. This page appears differently for hosted and non-hosted payments.</td>
</tr>
<tr>
<td>Electronic Payments/ Purchases - Purchase Items - Payment Result</td>
<td>SSF_SS_PMT_RESULT</td>
<td>Click the Submit button on the Purchase Items - Confirm Payment page.</td>
<td>View successful and declined payment results.</td>
</tr>
</tbody>
</table>
Purchasing Miscellaneous Items

Access the Electronic Payments/Purchases - Purchase Items - Select Campus page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items, Select Campus).

Image: Electronic Payments/Purchases - Purchase Items - Select Campus page

This example illustrates the fields and controls on the Electronic Payments/Purchases - Purchase Items - Select Campus page. You can find definitions for the fields and controls later on this page.

Lauretta Lewis

<table>
<thead>
<tr>
<th>Account Inquiry</th>
<th>Electronic Payments/Purchases</th>
<th>Account Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>make a payment</td>
<td>purchase items</td>
<td>payment profile</td>
</tr>
</tbody>
</table>

Purchase Items

1. Select Campus

Select the Campus from which you wish to make your purchases. Click the NEXT push button.

Campus

PS University
Selecting Items

Access the Electronic Payments/Purchases - Purchase Items - Select Items page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus and click the Next button).

**Image: Electronic Payments/Purchases - Purchase Items - Select Items page**

This example illustrates the fields and controls on the Electronic Payments/Purchases - Purchase Items - Select Items page. You can find definitions for the fields and controls later on this page.

**Lauretta Lewis**

**Account Inquiry**
- make a payment

**Electronic Payments/Purchases**
- purchase items

**Account Services**
- payment profile

**Purchase Items**

2. Select Items

Enter the quantity for the items you wish to purchase. Use the calculate total push button to calculate the total amount of your purchase. Click NEXT to confirm your purchases.

**Football Tickets**

<table>
<thead>
<tr>
<th>Available Items</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Uni vs. Cal Tech</td>
<td>35.00</td>
<td>4</td>
<td>140.00</td>
</tr>
<tr>
<td>PS Uni vs. USC</td>
<td>38.00</td>
<td>4</td>
<td>152.00</td>
</tr>
<tr>
<td><strong>Football Tickets Total</strong></td>
<td></td>
<td></td>
<td><strong>202.00</strong></td>
</tr>
</tbody>
</table>

**Magazines**

<table>
<thead>
<tr>
<th>Available Items</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newsweek</td>
<td>19.95</td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>TIME Magazine</td>
<td>29.95</td>
<td>1</td>
<td>29.95</td>
</tr>
<tr>
<td><strong>Magazines Total</strong></td>
<td></td>
<td></td>
<td><strong>29.95</strong></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>321.95</td>
</tr>
</tbody>
</table>

**calculate total**

Students can make multiple transactions at one time. For term-based selections, current and future terms will appear in the grid. Expired terms (based on the term end date) or items that are not within the effective date and expiration date will not be available for selection.
If taxes (sales or GST) are included, a separate line item will appear after the Total line. A subtotal line appears after each grid for multiple entries in each category.

After selections are made, click the Calculate Total button.

If you click Cancel, the system exits the Miscellaneous Purchases page and accesses the Account Summary page.

Click Next to have the system display a purchase confirmation page.

Click Next again to begin the Make a Payment process.

**Confirming an Order**

Access the Electronic Payments/Purchases - Purchase Items - Confirm Order page (Self Service, Campus Finances, Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items and click the Next button).

**Image: Electronic Payments/Purchases - Purchase Items - Confirm Order page**

This example illustrates the fields and controls on the Electronic Payments/Purchases - Purchase Items - Confirm Order page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Lauretta Lewis</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account Inquiry</strong></td>
<td><strong>Electronic Payments/Purchases</strong></td>
<td><strong>Account Services</strong></td>
</tr>
<tr>
<td>make a payment</td>
<td>purchase items</td>
<td>payment profile</td>
</tr>
</tbody>
</table>

**Purchase Items**

3. Confirm Order

Verify the amount and total of the items you have selected for purchase. If correct, click the NEXT push button. If you wish to make changes, click the PREVIOUS push button.

<table>
<thead>
<tr>
<th>Selected Items</th>
<th>Term</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Uni vs. Cal Tech</td>
<td>35.00</td>
<td>4</td>
<td></td>
<td>140.00</td>
</tr>
<tr>
<td>PS Uni vs. USC</td>
<td>38.00</td>
<td>4</td>
<td></td>
<td>152.00</td>
</tr>
<tr>
<td>TIME Magazine</td>
<td>29.95</td>
<td>1</td>
<td></td>
<td>29.95</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.  

<table>
<thead>
<tr>
<th>Item</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>321.95</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This page provides a consolidated list of selections and a total of all items before beginning the Make a Payment process.

Click Next to proceed through the Make a Payment process.
Making a Payment

For information about making a payment for miscellaneous items, refer to the Making Self-Service Payments section.

Using Account Services

This section discusses how to:

- Set up and manage bank accounts.
- Enroll in direct deposit.
- Enroll in a payment plan.
- View the 1098-T form.
- Receive the 1098-T form online.
- Complete the 1098-T consent agreement.
- Receive the 1098-T consent confirmation.
- View student permissions.
- Select the permission form.
- Grant permission using the form agreement.
- Confirm student permission.
- View student permission agreement.

Pages Used for Account Services

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Bank Accounts</td>
<td>SSF_SS_BANK_VW</td>
<td>Self Service, Campus Finances, Manage My Bank Accounts, My Bank Accounts</td>
<td>View existing bank account details and access pages for adding and editing bank account details.</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Bank Location and Currency</td>
<td>SSF_SS_BANK_CNTRY</td>
<td>Click the Add Account button on the My Bank Accounts page.</td>
<td>Specify the country and currency of the bank account.</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Add Bank Account Details</td>
<td>SSF_SS_BANK_DET</td>
<td>Click the Add Account button on the My Bank Accounts page. Click the Add Another Bank Account button on the My Direct Deposits - Bank Account Summary page.</td>
<td>Set up and edit bank accounts for direct deposit refunds.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>----------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Agreement</td>
<td>SSF_SS_BANK_SUB</td>
<td>Click the Next button on the Manage My Bank Accounts - Add Bank Account Details page.</td>
<td>Review the bank agreement.</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Result</td>
<td>SSF_SS_BANK_RES</td>
<td>Click the Submit button on the Manage My Bank Accounts - Agreement page.</td>
<td>Confirm bank account details.</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Delete</td>
<td>SSF_SS_DELETE_BANK</td>
<td>Click the Delete icon on the My Bank Accounts - Bank Account Summary page.</td>
<td>Delete bank accounts and direct deposits.</td>
</tr>
<tr>
<td>Manage My Bank Accounts - Cancel</td>
<td>SSF_SS_CONFIRM</td>
<td>Click the Cancel button during the Manage my Bank Accounts or Enroll in Direct Deposit process.</td>
<td>Cancel an action during the Manage my Bank Accounts or Enroll in Direct Deposit process.</td>
</tr>
<tr>
<td>My Direct Deposits</td>
<td>SSF_SS_DIRDEP_VW</td>
<td>Self Service, Campus Finances, Enroll in Direct Deposit, My Direct Deposits Select Enroll in Direct Deposit from Student Center. Click the Enroll in Direct Deposit link on the Manage My Bank Accounts - Result page.</td>
<td>Access the first step in the enroll in direct deposit process or access the pages to edit existing distributions.</td>
</tr>
<tr>
<td>My Direct Deposits - Bank Account Summary</td>
<td>SSF_SS_DIRDEP_CONF</td>
<td>Click the Enroll in Direct Deposit button on the My Direct Deposits page.</td>
<td>Review the bank accounts that are set up for direct deposit refund distributions and continue to the next step of the enroll in direct deposit process.</td>
</tr>
<tr>
<td>Enroll in Direct Deposit - Add Direct Deposit</td>
<td>SSF_SS_DIRDEP_BNK</td>
<td>Click the Proceed to Enroll in Direct Deposit button on the My Direct Deposits - Bank Account Summary page.</td>
<td>Set up direct deposit distribution details.</td>
</tr>
<tr>
<td>Enroll in Direct Deposit - Agreement</td>
<td>SSF_SS_DIRDEP_SUB</td>
<td>Click the Next button on the Enroll in Direct Deposit - Add Direct Deposit page.</td>
<td>Review the direct deposit agreement.</td>
</tr>
<tr>
<td>Enroll in Direct Deposit - Result</td>
<td>SSF_SS_DIRDEP_RES</td>
<td>Click the Submit button on the Enroll in Direct Deposit - Agreement page.</td>
<td>Confirm direct deposit details.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>---------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account Services - Enroll in Payment Plan - Select Payment Plan</td>
<td>SSF_SS_PPL_SEL</td>
<td>• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan</td>
<td>Select a payment plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 1 of the Payment Plan Wizard.</td>
<td></td>
</tr>
<tr>
<td>Account Services - Enroll in Payment Plan - Review Installments</td>
<td>SSF_SS_PPL_CALC</td>
<td>• Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan</td>
<td>Change the installment amount, number of installments, or both.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Next button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 2 of the Payment Plan Wizard.</td>
<td></td>
</tr>
<tr>
<td>Account Services - Enroll in Payment Plan - Agreement</td>
<td>SSF_SS_PPL_SUBMIT</td>
<td>• Self Service, Campus Finances, Enroll in Payment Plan - Review Installments</td>
<td>Review the terms of the payment plan before enrolling in the plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Next button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 3 of the Payment Plan Wizard.</td>
<td></td>
</tr>
<tr>
<td>Account Services - Enroll in Payment Plan - Agreement</td>
<td>SSF_SS_PPL_RESULT</td>
<td>• Self Service, Campus Finances, Enroll in Payment Plan - Review Installments</td>
<td>Review the terms of the payment plan before enrolling in the plan.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Next button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 4 of the Payment Plan Wizard.</td>
<td></td>
</tr>
<tr>
<td>Account Services - 1098T Tax Form</td>
<td>SSF_SS_1098_SEL</td>
<td>• Self Service, Campus Finances, Account Services - View 1098-T</td>
<td>Indicate which tax year to view.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 1 of the View 1098-T Wizard.</td>
<td></td>
</tr>
<tr>
<td>1098-T Consent Agreement</td>
<td>SSF_SS_1098_RESULT</td>
<td>• Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement</td>
<td>Capture 1098-T consent confirmation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Submit button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 2 of the View 1098-T Wizard.</td>
<td></td>
</tr>
<tr>
<td>Account Services - Student Permissions</td>
<td>SSF_SS_PERM_VIEW</td>
<td>Self Service, Campus Finances, View Student Permissions</td>
<td>View student permissions.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------------------------</td>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Student Permissions - Select Permission Form</td>
<td>SSF_SS_PERM_SEL</td>
<td>• Self Service, Campus Finances, View Student Permissions</td>
<td>Select the desired permissions form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Grant Permissions button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 1 of Student Permissions selection.</td>
<td></td>
</tr>
<tr>
<td>Student Permissions - Permission Form Agreement</td>
<td>SSF_SS_PERM_SUBMIT</td>
<td>• Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form</td>
<td>Read and agree to the selected permissions form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Next button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 2 of Student Permissions selection.</td>
<td></td>
</tr>
<tr>
<td>Student Permissions - Student Permission Confirmation</td>
<td>SSF_SS_PERM_RESULT</td>
<td>• Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement</td>
<td>Receive student permission confirmation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Submit button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 3 of Student Permissions selection.</td>
<td></td>
</tr>
<tr>
<td>Student Permission Agreement</td>
<td>SSF_SS_PERM_VW_SEC</td>
<td>• Self Service, Campus Finances, View Student Permissions</td>
<td>Review the student permission agreement.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Display Student Agreement link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Access step 4 of Student Permissions selection.</td>
<td></td>
</tr>
</tbody>
</table>

### Setting Up and Managing Bank Accounts

Students use the My Bank Accounts pages to set up and manage bank accounts.

See "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.0: Student Financials).

See Setting Up Institution Sets.

See "Setting Up Your Business Unit to Refund Customers" (PeopleSoft Campus Solutions 9.0: Student Financials).
Understanding the My Bank Accounts Page

Whether a student is setting up a bank account for the first time or has previously set up an account and wants to edit that account or add another account, the My Bank Accounts page is always the first page that a student sees. This page is known as the landing page for student bank accounts.

After a student adds at least one account, the page is called the My Bank Accounts - Bank Account Summary page.

**Image: My Bank Accounts (Bank Account Summary) example page**

This example illustrates the fields and controls on the My Bank Accounts (Bank Account Summary) example page. You can find definitions for the fields and controls later on this page.

Only active bank accounts are displayed on this page. Students can view, edit, and delete bank account details from this landing page.
Before a student sets up a bank account, this is how the page appears:

**Image: My Bank Accounts example page**

This example illustrates the fields and controls on the My Bank Accounts example page. You can find definitions for the fields and controls later on this page.

### Adding a Bank Account

Access the Manage My Bank Accounts - Add Bank Account Details page (click the Add Account button on the My Bank Accounts page).

**Image: Bank Location and Currency page**

This example illustrates the fields and controls on the Bank Location and Currency page. You can find definitions for the fields and controls later on this page.
Students access this page from the My Bank Accounts (landing) page. This page appears only if the Allow Change in Country check box is selected on the SF Institution – General Options page.

**Country**
If a country is not selected, the default value from the HRMS installation setup is retrieved.

**Currency**
If a currency is not selected, the default value from the HRMS installation setup is retrieved.

**Next**
Click to access the Add Bank Account Details page.

**Image: Manage My Bank Accounts - Add Bank Account Details page**

This example illustrates the fields and controls on the Manage My Bank Accounts - Add Bank Account Details page. You can find definitions for the fields and controls later on this page.

If the Bank Location and Currency page is not enabled, students access this page from the My Bank Accounts (landing) page. Students also access this page if they set up direct deposit distributions (using Enroll in Direct Deposit) but have not yet set up a bank account.

When students set up or modify a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank
Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated. Also, when students modify a bank account, only the Nickname field can be edited. The other fields are view-only.

The bank details on this page are validated according to the validation procedures in HRMS. To prevent duplicate bank accounts, the system checks that the combination of EmplID, Routing Number, Branch, and Account Number is unique.

If students are able to set the country and currency for their bank, the fields that appear here are based on the country they select.

**Nickname**

Enter an alias for the bank account.

The nickname appears instead of the bank account name when the student enrolls in direct deposit.

**Account Type**

By default, *Checking* is selected.

**Routing Number**

Select a routing number. The available values are based on the bank details record in HRMS.

**Branch**

The values for this field depend on the routing number, and are based on the bank details record in HRMS.

**Account Number**

Enter an account number.

For security reasons, only the last four digits of the account number appears after the student saves the page. The account number is also encrypted and stored in the database.

**Confirm Account Number**

The value in this field must match the value in the Account Number field. Also, if the account number is modified, this field is enabled and the same account number must be provided.

This field does not appear when a value is entered in the IBAN field.

**Account Holder**

Enter the account holder name as it appears on the bank account.

**Check Digit**

Enter the two-digit number after the first two-letter country code of the IBAN.

This field appears based on the country code.

**IBAN and BIC Code**

If the IBAN is provided, then the BIC Code must also be provided.

Student Financials uses the information in the HRMS IBAN Country Setup page to perform the required validation and prompt for values in the lookups.

- If IBAN is not enabled and not required, or the country is not defined on the IBAN Country Setup page, the IBAN and BIC Code fields do not appear.
• If IBAN is enabled but not required, provide values in the other bank information fields. The information is saved, and the IBAN and BIC Code are stored as blank.

When bank details are derived from the IBAN and BIC setup, the details appear as view-only.

For example, if the student enters an IBAN value of NL51ABNA0401396312, the BIC Code becomes required. The BIC Code values that are available are all those for the country NLD, which are based on the IBAN value (the first 2 digits are always the country and the next 2 digits are always the IBAN check digit). The student selects a BIC Code of ABNANL2A (this is an available value because it is set up on the Bank Branch Setup table in HR). The Routing Number and Branch fields are populated and are view only—with the values 0150681 (BankID already set up for ABN Amro) and ABNANL2 (Branch ID) respectively. The Bank Name and Branch Name also appear.

• If IBAN is enabled and required, a value for IBAN and BIC Code must be provided.

The Account Number field is populated based on the IBAN value and appears as view-only. The other standard bank fields are view-only.

For security reasons, only the last four digits of the IBAN appear after the page is saved.

See PeopleSoft HRMS Application Fundamentals, Setting Up Banks and Bank Branches.

View Sample Check
Click to view a sample image of a check in a new window. This link appears only for the United States (USA) and Canada (CAN).

Help
Click to open a Help page in a new window. The URL that is selected in the Help URL field in the Manage Bank Options group box on the SF Institution Set - General Options page is used here. If that setup is not done, the link does not appear here.

Next
Click to go to the Agreement or Confirmation page.

The Agreement page appears if the first bank account is being created, otherwise the Confirmation page appears if there are no validation errors.

Note: For further information about this page, refer to the documentation about the related administrative component.
Reviewing the Bank Agreement

Access the Manage My Bank Accounts - Agreement page (click the Next button on the Manage My Bank Accounts - Add Bank Account Details page).

Image: Manage My Bank Accounts - Agreement page

This example illustrates the fields and controls on the Manage My Bank Accounts - Agreement page. You can find definitions for the fields and controls later on this page.

This page appears only:

• if the Display Agreement check box is selected in the Manage Bank Options group box on the SF Institution - General Options page.

• once, when the first bank account is created.

Yes, I agree to the terms and conditions of this agreement. Select to be able to save bank details.

Submit Click to save bank details and go to the Manage My Bank Accounts – Result page.

An agreement type of Bank Account is inserted into the Agreement table.

Additional Details Opens a page in another window. The page that appears is derived from the URL that is specified in the Additional details URL field in the Manage Bank Options group box on the SF
Institution Set - General Options page is used here. If the setup is not done, the link does not appear here.

**Note:** The bank agreement cannot be revoked either by administrative staff or by students. The agreement remains in the table even if all bank account details are deleted or made inactive.

### Confirming Bank Account Details

Access the Manage My Bank Accounts - Result page (click the Submit button on the Manage My Bank Accounts - Agreement page).

**Image: Manage My Bank Accounts - Result page**

This example illustrates the fields and controls on the Manage My Bank Accounts - Result page. You can find definitions for the fields and controls later on this page.

#### Emmitt Elliott

<table>
<thead>
<tr>
<th>Account Inquiry</th>
<th>Electronic Payments/Purchases</th>
<th>Account Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>direct deposit</td>
<td>enroll in payment plan</td>
<td>1098t tax form</td>
</tr>
<tr>
<td></td>
<td></td>
<td>student permission</td>
</tr>
<tr>
<td></td>
<td></td>
<td>bank accounts</td>
</tr>
</tbody>
</table>

#### Manage My Bank Accounts

**Result**

- You have successfully added the bank account MyChecking.

#### Bank Details

- **Nickname:** MyChecking
- **Account Type:** Checking
- **Routing Number:** 121782676 (CitiBank)
- **Branch:**
- **Account Number:** XXXX2345
- **Account Holder:** E Elliott

#### Enroll in Direct Deposit

Click to access the My Direct Deposit pages and set up distributions for direct deposit refunds.

This button appears only if AP Refunding Option is set to *Use Single Payment Voucher* on the SF Installation page.
Manage My Bank Accounts

Click to access the landing page (My Bank Accounts - Bank Account Summary page) from which additional bank accounts can be added, or existing bank accounts can be edited or deleted.

When students create a bank account or edit bank account details, they receive an email notification based on the Event ID set up on the SF Installation page.

Modifying a Bank Account

Click the Edit icon on the My Bank Accounts – Bank Account Summary page.

Image: Edit Bank Account Details page

This example illustrates the fields and controls on the Edit Bank Account Details page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Emmitt Elliott</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Inquiry</td>
</tr>
<tr>
<td>enroll in payment plan</td>
</tr>
</tbody>
</table>

Manage My Bank Accounts

Edit Bank Account Details

Personalize your bank account with a nickname.

<table>
<thead>
<tr>
<th>Bank Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nickname</td>
</tr>
<tr>
<td>Account Type</td>
</tr>
<tr>
<td>Bank Code</td>
</tr>
<tr>
<td>Branch</td>
</tr>
<tr>
<td>Account Number</td>
</tr>
<tr>
<td>Account Holder</td>
</tr>
</tbody>
</table>

Bank Location is United States
Currency used is US Dollar

The Nickname field is the only field that can be edited. The other fields are view-only.

When students modify a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated.

Next

Click to go to the Manage My Bank Accounts - Result page.
Deleting a Bank Account

Click the Delete icon on the My Bank Accounts – Bank Account Summary page.

When a student deletes a bank account, the bank account status is set to Inactive. To delete a bank account for which a direct deposit distribution is set up, students must first deactivate the direct deposit distribution.

When students delete a bank account, data is inserted in the 3C trigger table with the Bank Event ID and institution to facilitate communication using 3C and the Comm Gen process. The Bank Event ID and institution are derived from the SF Installation setup only if the Bank Event ID is populated.

Enrolling in Direct Deposit

Students use the My Direct Deposit pages to specify how direct deposit refunds are distributed across their bank accounts.

Students can access the Direct Deposit feature in Self Service only if:

• Use Single Payment Voucher is selected as the AP Refunding Option on the SF Installation page.
• The Direct Deposit Enrollment check box is selected on the SF institution Set - General Options page.
• A/P is selected in the Refund Method field on the Refund Setup component of the SF Business Unit.
• The student does not have a negative service impact for Disable Manage My Banks on the SF Institution Set - Business Units page.

See "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.0: Student Financials).

See Setting Up Institution Sets.

See "Setting Up Your Business Unit to Refund Customers" (PeopleSoft Campus Solutions 9.0: Student Financials).

See: Addendum: Direct Deposit Through AP Refunding.pdf which is posted to My Oracle Support as part of Additional Features January 2011

Understanding the My Direct Deposits Page

Whether a student is enrolling in direct deposit for the first time or has previously set up direct deposit distributions and wants to edit them, the My Direct Deposits page is always the first page that a student sees. This page is known as the landing page for direct deposits.
After a student enrolls in direct deposit, the page is called the My Direct Deposits - Direct Deposit Summary page. Here is an example of the page:

**Image: My Direct Deposits - Direct Deposit Summary example page**

This example illustrates the fields and controls on the My Direct Deposits - Direct Deposit Summary example page. You can find definitions for the fields and controls later on this page.

From this summary page, students can add more distributions and edit or delete their existing distributions by clicking the Modify Direct Deposit button.
Using the My Direct Deposits Page

Access the My Direct Deposits page (Self Service, Campus Finances, Enroll in Direct Deposit, My Direct Deposits).

Image: My Direct Deposits page

This example illustrates the fields and controls on the My Direct Deposits page. You can find definitions for the fields and controls later on this page.

This is how the landing page appears the first time that a student enrolls in direct deposit.

Enroll in Direct Deposit

To enroll in direct deposit, the student must have already set up at least one bank account.

If the student has set up at least one bank account, then when the student clicks the Enroll in Direct Deposit button, the student is taken to the next step of the process.

If the student clicks the Enroll in Direct Deposit button and has not set up a bank account, the Manage My Bank Accounts - Add Bank Account Details page appears. The student continues through the process of setting up one or more bank accounts. When the Manage My Bank Accounts - Result page appears, the student clicks the Enroll in Direct Deposit link on that page and then completes the direct deposit distribution set up.

For information about the Manage My Bank Accounts pages, refer to the previous documentation section: Setting Up Bank Accounts.
Reviewing Bank Accounts for Enrolling in Direct Deposit

Access the My Direct Deposits - Bank Account Summary page (click the Enroll in Direct Deposit button on the My Direct Deposits - Direct Deposit Summary page).

**Image: My Direct Deposits - Bank Account Summary page**

This example illustrates the fields and controls on the My Direct Deposits - Bank Account Summary page. You can find definitions for the fields and controls later on this page.

For students who have set up bank accounts but have not enrolled in direct deposit, the page appears as in the example page shown above.

Students can view the bank accounts that can be used for refund distributions. Students can also add additional bank accounts.

Students then proceed to the next step in the enroll in direct deposit process from this page.

If students have set up bank accounts and enrolled in direct deposit, the Proceed to Enroll in Direct Deposit button is replaced with a Proceed to Modify Direct Deposit button.
Adding Direct Deposits

Access the Enroll in Direct Deposit - Add Direct Deposit page (click the Proceed to Enroll in Direct Deposit button on the My Direct Deposits - Bank Account Summary page).

Image: Enroll in Direct Deposit - Add Direct Deposit page

This example illustrates the fields and controls on the Enroll in Direct Deposit - Add Direct Deposit page. You can find definitions for the fields and controls later on this page.

On this page, students specify how they want refunds distributed between bank accounts.

**Bank Account Nickname**

Students must enter a value in the Nickname field when they set up their bank accounts. That nickname, followed by the last 4 digits of the account number, appears here.

*Note:* Only one distribution per bank account (nickname) is allowed.

**Distribution Type**

Values are *Amount, Balance, and Percentage*.

One bank account must be assigned a distribution type of *Balance*.

If the maximum distribution allowed is 1 (based on the Maximum Distributions field on the SF Institution Set-General Options page) the only Distribution Type value available is *Balance*. The whole refund amount is disbursed to one account.
If multiple distributions are allowed and the student does not assign one account as Balance, an error appears on save.

**Amt./Pct. (amount/percentage)**

This field is available only if the maximum distributions allowed is greater than 1.

The value that the student enters can include up to 2 decimal points—for example, 100.50 or 50.25.

This field is not available for entry if the Distribution Type is Balance.

**Priority**

The student enters a value to indicate the order in which bank accounts are selected when a refund is posted. The value must be a whole number.

The lower the number, the higher the priority—for example, an account with value 1 is used first, then an account with value 2 is used next.

When the Distribution Type is Balance, the default value of the Priority field is 999 (the value is hidden) and the field is not available for entry.

**add account distributions**

This button is available only if the maximum distributions allowed is greater than 1.

**Help**

The student clicks this link to access the URL that you set up in the Direct Deposit Options group box on the SF Institution Set-General Options page. If the setup is not done, the link does not appear.

**Delete**

When a record is deleted, the row is removed and all other rows are stamped with the current effective date and a new effective sequence number.

The Delete icon does not appear for the row with a Distribution Type of Balance.

---

**Note:** For further information about this page, refer to the documentation about the related administrative component.

See "Setting Up and Managing Direct Deposit Distributions for AP Refunding" (PeopleSoft Campus Solutions 9.0: Student Financials).
Reviewing the Direct Deposit Agreement

Access the Enroll in Direct Deposit - Agreement page (click the Next button on the Enroll in Direct Deposit - Add Direct Deposit page).

Image: Enroll in Direct Deposit - Agreement page

This example illustrates the fields and controls on the Enroll in Direct Deposit - Agreement page. You can find definitions for the fields and controls later on this page.

Emmitt Elliott

<table>
<thead>
<tr>
<th>Account Inquiry</th>
<th>Electronic Payments/Purchases</th>
<th>Account Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>direct deposit</td>
<td></td>
<td>bank accounts</td>
</tr>
</tbody>
</table>

Enroll in Direct Deposit Agreement

Review the bank information and agreement. Click Submit to complete the Direct Deposit enrollment.

<table>
<thead>
<tr>
<th>Bank Name</th>
<th>Distribution Type</th>
<th>Amt./Pct.</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>mysavings-8761</td>
<td>Percent</td>
<td>50.00</td>
<td>1</td>
</tr>
<tr>
<td>mychecking-2354</td>
<td>Balance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Currency used is US Dollar

You are about to enroll in Direct Deposit of your refund checks. Signing up for direct deposit will allow excess proceeds from financial aid and over payments applied to your student account to be deposited directly into your checking or savings account. You will receive your funds faster with direct deposit instead of a check mailed to you. I hereby authorize in accordance with the rules and regulations of the National Automated Clearinghouse Association ("NACHA") my institution to credit any reimbursements due to me via automated clearinghouse electronic fund transfer ("ACH") to the bank(s) referenced above. You may change your account information as necessary. Funds will be available depending on timing of this submission. Should you wish to cancel your direct deposit enrollment, please come to the Bursar’s Office.

The agreement is dated: 12/21/2010

Additional Details

Yes, I agree to the terms and conditions of this agreement.

This page appears automatically the first time that a student sets up direct deposit distributions.

When the student selects the check box and clicks the Submit button, an agreement type of DD Enroll is inserted into the Agreement table.

If the Display Subsequent Agreement check box is selected in the Direct Deposit Options group box on the SF Institution - General Options page, compliance text appears when the student edits direct deposit distributions.
When the student selects the check box and clicks the Submit button, an agreement type of DD Change is inserted into the Agreement table.

The student clicks the Additional Details link to access the URL that you set up in the Direct Deposit Options group box on the SF Institution Set-General Options page. If the setup is not done, the link does not appear.

**Confirming Direct Deposit Details**

Access the Enroll in Direct Deposit - Result page (click the Submit button on the Enroll in Direct Deposit - Agreement page).

**Image: Enroll in Direct Deposit - Result page**

This example illustrates the fields and controls on the Enroll in Direct Deposit - Result page. You can find definitions for the fields and controls later on this page.

Go To Direct Deposit Summary

The student click this button to access the My Direct Deposits - Direct Deposit Summary (landing) page.

You can view an example of the landing page earlier in this section.

From the landing page, students can access the My Direct Deposits - Modify Direct Deposit page where they can edit existing distributions, add more distributions, and delete distributions.

When a student enrolls in direct deposit or edits direct deposit distributions, an email notification is sent to the student based on Event ID setup on the SF Installation page.
Enrolling in a Payment Plan

Students can link their charges to a specified payment plan.

Select Payment Plan

Access the Account Services - Enroll in Payment Plan - Select Payment Plan page (Self Service, Campus Finances, Enroll in Payment Plan - Select Payment Plan).

Image: Account Services - Enroll in Payment Plan - Select Payment Plan page

This example illustrates the fields and controls on the Account Services - Enroll in Payment Plan - Select Payment Plan page. You can find definitions for the fields and controls later on this page.

1. Select Payment Plan

You are eligible to enroll in the following payment plans. You will need to follow the 4-step process for each payment plan you elect to enroll in.

<table>
<thead>
<tr>
<th>Payment Plans</th>
<th>Maximum Amount</th>
<th>Number of Installments</th>
<th>First Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service Demo</td>
<td>5,000.00</td>
<td>3</td>
<td>06/09/2006</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Financial Aid

This page enables students to select a payment plan from among all eligible payment plans.

Click a plan. The first line of the Plan Description is derived from the Payment Plan description. The text after the first line is derived from the Payment Plan setup - Self Service description.
Chapter 25 Using Student Financials Self Service

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Review Installments

Access the Enroll in Payment Plan - Review Installments page (Self Service, Campus Finances, Enroll in Payment Plan, Select Payment Plan and click the Next button).

Image: Account Services - Enroll in Payment Plan - Review Installments page

This example illustrates the fields and controls on the Account Services - Enroll in Payment Plan - Review Installments page. You can find definitions for the fields and controls later on this page.

Jesse Martinez

Account Inquiry  Electronic Payments/Purchases  Account Services

| enroll in payment plan | 1099 tax form | student permission |

Enroll in Payment Plan

2. Review Installments

You have selected Self Service Demo.

Self Service Demo. Allow student to change installment amount and number of installments. Installment Plans may assess an administrative fee.

| Eligible Charges: | 900.00 |
| Plan Amount:      | 5,000.00 |
| Number of Installments: | 3 |

Installment Schedule

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Installment</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/09/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>07/10/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>08/09/2006</td>
<td>300.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>900.00</strong></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Important: The Installment Schedule above is based on your current eligible charges of 900.00. If charges that are placed in this plan are reversed or reduced, your installment payment will also be automatically reduced. If you incur eligible charges in the future, they will be added to this installment schedule automatically, up to the amount of 5,000.00.
Agreement

Access the Enroll in Payment Plan - Agreement page ((Self Service, Campus Finances, Enroll in Payment Plan - Review Installments and click the Next button).

Image: Account Services - Enroll in Payment Plan - Agreement page (1 of 2)

This example illustrates the fields and controls on the Account Services - Enroll in Payment Plan - Agreement page (1 of 2). You can find definitions for the fields and controls later on this page.

Jesse Martinez

<table>
<thead>
<tr>
<th>Account Inquiry</th>
<th>Electronic Payments/Purchases</th>
<th>Account Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>enroll in payment plan</td>
<td>1098t tax form</td>
<td>student permission</td>
</tr>
</tbody>
</table>

Enroll in Payment Plan

3. Agreement

Please examine the terms of the payment plan carefully before enrolling in the plan.

Self Service Demo

You are about to enroll in Self Service Demo.

Self Service Demo. Allow student to change installment amount and number of installments. Installment Plans may assess an administrative fee.
This example illustrates the fields and controls on the Account Services - Enroll in Payment Plan - Agreement page (2 of 2). You can find definitions for the fields and controls later on this page.

**Plan Amount:** 900.00

**Number of Installments:** 3

<table>
<thead>
<tr>
<th>Installment Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Installment</td>
</tr>
<tr>
<td>06/09/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>07/10/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>08/09/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>Total</td>
<td>900.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

**Important:** The Installment Schedule above is based on your current eligible charges of $900.00. If charges that are placed in this plan are reversed or reduced, your installment payment will also be automatically reduced. If you incur eligible charges in the future, they will be added to this installment schedule automatically, up to the amount of $5,000.00.

I agree to the installment schedule listed above. If I default on any installments, I understand that full amount may be due immediately and a hold will be placed on my account.

**The agreement is dated:** 06/22/2006

Yes, I have read the agreement

Financial Aid

Account Inquiry  Electronic Payments/purchases  Account Services

Enroll In Payment Plan  1098t Tax Form  Student Permission

goto ...
Results

Access the Account Services - Enroll in Payment Plan - Result page (Self Service, Campus Finances, Account Services - Enroll in Payment Plan - Agreement and click the Next button).

Image: Account Services - Enroll in Payment Plan - Result page

This example illustrates the fields and controls on the Account Services - Enroll in Payment Plan - Result page. You can find definitions for the fields and controls later on this page.

Jesse Martinez

Enroll in Payment Plan

4. Result

Congratulations!
You have successfully enrolled in Self Service Demo. Please keep the installment schedule below for your reference.

<table>
<thead>
<tr>
<th>Installment Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Installment</td>
</tr>
<tr>
<td>06/30/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>07/10/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>08/09/2006</td>
<td>300.00</td>
</tr>
<tr>
<td>Total</td>
<td>900.00</td>
</tr>
</tbody>
</table>

Administrators can use the Review Self Service Agreements page to view enrollment agreement data.

Viewing the 1098-T Form

The 1098-T is an Internal Revenue Service (IRS) form that reports tuition and related expenses that a student can use to claim an educational tax credit.

Student Financials enables a student to view and reprint a substitute copy of the 1098-T after having received a paper copy through postal mail.
It also enables the student to consent to accessing an electronic version of the 1098-T form through the student self-service feature.

On the View 1098–T page, the Box Amount tab enables the student to access the details for individual box amounts.

Access the Account Services - View 1098-T page (Self Service, Campus Finances, Account Services - View 1098-T).

**Image: Account Services - View 1098-T page**

This example illustrates the fields and controls on the Account Services - View 1098-T page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Lauretta Lewis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Inquiry</td>
</tr>
</tbody>
</table>

**View 1098-T**

Years listed indicate which 1098-T reports are available for you to access. Please note that Printed Date will only be visible for years you received a paper copy. Click on the Tax Year you wish to view.

**NOTE:** If you use a pop up blocker, you will have to disable it to display your 1098-T.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Federal Tax ID</th>
<th>Institution</th>
<th>Version</th>
<th>Printed Date</th>
<th>Transmittal Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>XXXXXXXXXX</td>
<td>PeopleSoft University</td>
<td>Original</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>XXXXXXXXXX</td>
<td>PeopleSoft University</td>
<td>Original</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the tax year you want to view.
Access the 1098-T page.

**Image: 1098-T page**

This example illustrates the fields and controls on the 1098-T page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Form 1098-T (keep for your records)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recipient</strong></td>
</tr>
<tr>
<td>Fill in name, address, city, state, ZIP code, and telephone number.</td>
</tr>
<tr>
<td>Fill in Social security number.</td>
</tr>
<tr>
<td>Fill in student identification number.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Payments received for qualified tuition and related expenses</td>
<td>$0</td>
</tr>
<tr>
<td>2</td>
<td>Amounts billed for qualified tuition and related expenses</td>
<td>$645</td>
</tr>
<tr>
<td>3</td>
<td>If the box is checked, your educational institution has changed its reporting method for 2006</td>
<td>✔</td>
</tr>
<tr>
<td>4</td>
<td>Adjustments made for a prior year</td>
<td>$0</td>
</tr>
<tr>
<td>5</td>
<td>Scholarships or grants</td>
<td>$0</td>
</tr>
<tr>
<td>6</td>
<td>Adjustments to scholarships or grants for a prior year</td>
<td>$0</td>
</tr>
<tr>
<td>7</td>
<td>Adjusted if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2007</td>
<td>✔</td>
</tr>
<tr>
<td>8</td>
<td>Checked if at least half-time student</td>
<td>✔</td>
</tr>
<tr>
<td>9</td>
<td>Checked if a graduate student</td>
<td>✔</td>
</tr>
<tr>
<td>10</td>
<td>Line contract rate is included</td>
<td>✔</td>
</tr>
</tbody>
</table>

This is important tax information and is being furnished to the Internal Revenue Service.
**View 1098-T Amount Detail**

Access the Account Services - View 1098-T, Box Amount tab.

**Image: View 1098-T page, Box Amount tab**

This example illustrates the fields and controls on the View 1098-T page, Box Amount tab. You can find definitions for the fields and controls later on this page.

View the total amounts displayed on the 1098-T statement.

Access the View 1098- T - Amount Billed page.

**Image: View 1098-T- Amount Billed page**

This example illustrates the fields and controls on the View 1098-T- Amount Billed page. You can find definitions for the fields and controls later on this page.

View the details of the eligible items billed for the calendar year. This includes the term for which the charged occurred.
Access the View 1098-T - Prior Year Adjustments page.

**Image: View 1098-T - Prior Year Adjustments page**

This example illustrates the fields and controls on the View 1098-T - Prior Year Adjustments page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Account Type</th>
<th>Item Term</th>
<th>Actual Billing Date</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
</tbody>
</table>

View prior year adjustments to the amount billed for an aid year.

Access the View 1098-T - Scholarships or Grants page.

**Image: View 1098-T - Scholarships or Grants page**

This example illustrates the fields and controls on the View 1098-T - Scholarships or Grants page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Account Type</th>
<th>Item Term</th>
<th>Actual Billing Date</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
</tbody>
</table>

View a detailed summary of the scholarship or grant for an aid year. This includes the type of account, offered amount and payment date.

Access the View 1098-T - Payments Received page.

**Image: View 1098-T - Payments Received page**

This example illustrates the fields and controls on the View 1098-T - Payments Received page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Account Type</th>
<th>Item Term</th>
<th>Actual Billing Date</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1299.00</td>
<td>Tuition</td>
<td>0550</td>
<td>08/11/2008</td>
<td></td>
</tr>
</tbody>
</table>

View the payment received for an item. This includes the type of account and payment date.

**Receiving the 1098-T Form Online**

Your institution can provide the 1098-T form to students electronically. Students can consent to accessing an electronic version of the 1098-T form through student self service.
The student only sees the Consent Agreement for the 1098-T if they have not consented. After consent to receive the 1098-T electronically is granted, the agreement is no longer needed.

After consent is granted, it is effective for all years for which a 1098-T form was processed.

A student cannot revoke their consent online. Instead, the student must contact the institution to request that consent be revoked. Consent is revoked from an administrator page.

**Completing the 1098-T Consent Agreement**

Access the 1098-T Consent Agreement page (Self Service, Campus Finances, Account Services - View 1098-T, 1098-T Consent Agreement and click the Submit button).

**Image: 1098-T Consent Agreement page**

This example illustrates the fields and controls on the 1098-T Consent Agreement page. You can find definitions for the fields and controls later on this page.

**1098-T Consent**

1. **1098-T Consent Agreement**

I agree to receive my 1098-T Tax form electronically through on-line access. Clicking the “Yes, I have read the agreement” checkbox means you will no longer receive the 1098-T form via US mail. Click the Submit push button to always access your 1098-T on-line. Click the Cancel push button to return to the 1098-T Year selection.

**Yes, I have read the agreement**

Select to agree to receive 1098-T statements online.

**Cancel**

Click to cancel submission of the 1098-T Consent Agreement.

**Submit**

Click to submit the accepted 1098-T Consent Agreement.
Receiving the 1098-T Consent Confirmation

Access the 1098-T Consent Confirmation page.

**Image: 1098-T Consent Confirmation page**

This example illustrates the fields and controls on the 1098-T Consent Confirmation page. You can find definitions for the fields and controls later on this page.

This page confirms the 1098-T Consent Agreement.

**View 1098-T Selection**

Click to select and view a 1098-T.

Administrators can use the **Review Self Service Agreement** page to view Enrollment agreement data.

Viewing Student Permissions

U.S. Department of Education regulations require that Title IV financial aid awards be used to pay only allowable charges, for example, tuition, mandatory fees, and contracted housing and board, for the period of enrollment covered by the aid year in which those funds are awarded. Regulations require schools to collect individual authorization from a student in order to pay non-allowable charges such as parking fees or library fines, or for the prior year immediately preceding the current year.
Access the Account Services - Student Permissions page ((Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions.).

**Image: Account Services - Student Permissions page**

This example illustrates the fields and controls on the Account Services - Student Permissions page. You can find definitions for the fields and controls later on this page.

This page enables the student to begin the grant permission self-service process.

**Grant Permissions**  
Click to grant permissions.
Selecting the Permission Form

Access the Select Permission Form page (Self Service, Campus Finances, View Student Permissions, Account Services - Student Permissions and click the Grant Permissions button).

**Image: Select Permission Form page**

This example illustrates the fields and controls on the Select Permission Form page. You can find definitions for the fields and controls later on this page.

---

**Student Permissions**

1. Select Permission Form

IF YOU ARE RECEIVING FINANCIAL AID PLEASE READ AND TAKE APPROPRIATE ACTION. NO ACTION IS REQUIRED IF YOU ARE NOT A FINANCIAL AID RECIPIENT.

The Department of Education has implemented federal regulations that authorize this University to administer Title IV financial aid funds. Title IV funds are financial aid you may receive in your financial aid package from the University and include:

- Federal Pell Grant
- Federal Supplemental Education Opportunity Grant (SEOG)
- Federal Perkins Loan
- Federal Education Loan Program
- Stafford Loan Program - Subsidized and Unsubsidized
- Parent Loan

Select a permission form and click next to continue with the agreement process or click cancel.

<table>
<thead>
<tr>
<th>Permission Form</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APLALLSF</td>
<td>Apply to all SF charges for payment.</td>
</tr>
<tr>
<td>APPLYFA</td>
<td>Student sent waiver in with the FAN</td>
</tr>
<tr>
<td>FA_ALL</td>
<td>Permission to apply Title IV financial aid funds to all charges appearing on the account.</td>
</tr>
</tbody>
</table>

This page enables the student to read the Disclosure Statement. If multiple permissions exist, the student can select only one and then select Next to complete the process. Then the student can select another permission for review and submission.
Granting Permission Using the Form Agreement

Access the Permission Form Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Select Permission Form and click the Next button).

**Image: Permission Form Agreement page**

This example illustrates the fields and controls on the Permission Form Agreement page. You can find definitions for the fields and controls later on this page.

---

**2. Permission Form Agreement**

I authorize the university to retain in my account any excess Title IV financial aid funds and apply them toward any charges that may appear on my account for the academic year.

Permission to apply Title IV financial aid funds to all charges appearing on the account.

**The agreement is dated:** 10/11/2006

Yes, I have read the agreement

This page enables the student to select the Yes, I have read the agreement check box to verify reading of the agreement and permission.

The student clicks Submit to submit the permission form agreement.
Confirming Student Permission

Access the Student Permission Confirmation page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Permission Form Agreement and click the Submit button).

Image: Student Permission Confirmation page

This example illustrates the fields and controls on the Student Permission Confirmation page. You can find definitions for the fields and controls later on this page.

Click View Student Permission to return to the authorization page.

The student cannot revoke permission using self service; this can be done only by the administrator.
Viewing Student Permission Agreement

Access the Student Permission Agreement page (Self Service, Campus Finances, View Student Permissions, Student Permissions - Student Permission Confirmation and click the Display Student Agreement link).

Image: Student Permission Agreement page

This example illustrates the fields and controls on the Student Permission Agreement page. You can find definitions for the fields and controls later on this page.

Student Permission Agreement

The Department of Education has implemented federal regulations that authorize this University to administer Title IV financial aid funds. Title IV funds are financial aid you may receive in your financial aid package from the University and include:

- Federal Pell Grant
- Federal Supplemental Education Opportunity Grant (SEOG)
- Federal Perkins Loan
- Federal Education Loan Program
- Stafford Loan Program - Subsidized and Unsubsidized Parent Loan
- Federal Work Study Program

Federal regulations stipulate that Title IV financial aid funds can not be applied to your student account until ten (10) days prior to the first day of classes. Federal regulations further require that the University apply your Title IV financial aid funds to 'allowable charges', which are tuition, mandatory fees, and housing and board charges contracted with the University. The University also allows many departments to assess charges to your student account in order to consolidate billing. Some of these charges might include Parking Permit fees, Health Center charges, and other miscellaneous charges. Federal regulations require the University to obtain your authorization to apply your Title IV financial aid to all charges appearing on your...
Chapter 26

Using Financial Aid Self Service

Understanding Financial Aid Self-Service

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

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

Related Links
Setting Up Self-Service Inquiry Options

Accepting, Declining, and Reducing Awards

This section discusses how students:

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

Pages Used to Accept, Decline, and Reduce Awards

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Select Aid Year to View</td>
<td>SS_FA_AWD_AY_SEL</td>
<td>Self Service, Campus Finances, View Financial Aid, Select Aid Year to View</td>
<td>Access award acknowledgment for a particular aid year.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Financial Aid link in the Finances group box on the Student Center page (Self Service, Student Center).</td>
<td></td>
</tr>
</tbody>
</table>
## Selecting an Aid Year

Access the Financial Aid - Select Aid Year to View page (Self Service, Campus Finances, View Financial Aid, Select Aid Year to View).

The student selects the aid year for which he wants to accept, reduce, or decline awards on the Financial Aid - Select Aid Year to View page. The system displays all aid year and institution combinations for which the student is in attendance. If the student is in attendance at more than one institution, you cannot restrict the view to a single institution or aid year.

If you selected the Print Letter Option to Print in setup, the system displays all noncanceled awards for the student for the selected aid year. If total aid is greater than zero and the Print option does not equal Print, the link for that year is disabled, and the system displays Award access not available. instead of the aid year description. If the Allow Access check box is cleared on the Self Service Options page, the system displays No self service access for this aid year. If the Award Access check box is cleared on the Packaging Status Summary page for this student, the system displays Award not available.

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

## Accepting, Declining, and Reducing Awards Using Self-Service

Access the Financial Aid - Award Package page (Self Service, Campus Finances, Accept/Decline Awards, Financial Aid – Award Package).

The first time the student accesses the Financial Aid - Award Package page, the system displays the package status as New Package. For students who have submitted an award acknowledgment prior to this entry, the system displays an active Previous Transactions link.

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

The system applies the following rules:
• An award with a disbursed balance greater than zero cannot be adjusted during self-service activity. However, a student can modify awards with an authorized balance greater than zero.

• If the FA Item Type self-service action setup is specified as a reduction, the student can reduce awards in self-service and reduce awards with the following attributes: Professional Judgment, Need Override, Override, or Lock Flag based on FA Item Type self-service action setup.

• If the loan award allows for reductions based on the FA Item Type self-service action setup, the system ensures that the Offered amount and the Accepted amount are the same after the award is processed.

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

### Status

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

The Status values are:

**New Package:** No previous self-service activity exists and the student is eligible to receive awards. The student can accept, decline, or reduce any or all of the currently available awards.

**Needs Review:** The system cannot process one of the student's awards and post the changes because it found errors while processing an award. The system displays the awards as view-only and the Accept and Decline check boxes are not available to the student. The student should submit an administrative request to see a financial aid counselor.

Here are some examples of situations resulting in *Needs Review* status:

- The fiscal balance is below the submitted accepted or reduced amount.

- The disbursement ID of the self-service disbursement record does not match the system's disbursement IDs associated with the disbursement plan found in the corresponding award.

- The student reduces an award for which the term limit contains cents, but the award remainder rule specifies first or last dollars.
**Pending Update:** The student submitted the award acknowledgement and can revisit this page to determine whether the acknowledgement, changes, or both are accepted and make changes in the existing package. The student does not see the revised, reduced, or updated award amounts on the Financial Aid - Disbursement Schedule page until the batch process has been run.

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

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

**Successful:** The system successfully processed the acknowledgement, changes, or both that were submitted by the student.

**Successful with Adjustment:** The system successfully processed the student's award acknowledgment, but made adjustments to one or more awards. If the student reduced one or more awards below the minimum amount allowed, the system adjusts the awards to the minimum limit amount and returns this status.

---

**Award**
This link is available only for nonzero awards.

**Category**
The award category is based on the Financial Aid Type field on the FA Item Type 1 setup page.

**Career**
If the student has multiple careers, the system displays all awards from all careers.

**Accepted**
The amount accepted by the student for this award or auto-accepted by the packaging process. If reductions are permitted on the award—FA Item Type Self Service Actions option—this field is available for reduction after the student selects the Accept check box.

**Accept**
In administrative packaging, you can award a student an item type and set it automatically as Offer/Accept. For these awards, the system checks this Accept check box. For example, an administrator sets a work-study program award to Offer; and the Accept check box is cleared, giving the student the option to accept the award.
**Decline**

After this check box is selected, the system reduces the accepted amount to zero. If declines are not permitted on this award—FA Item Type Self Service Actions option—this field is not available to the student.

**Example of No Link on a Declined Award**

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

**Image: Award Package example**

This example illustrates the fields and controls on the Award Package example. You can find definitions for the fields and controls later on this page.

### Financial Aid

#### Award Package

**Financial Aid Year 2004-2005**

Your acknowledgement and/or changes were successfully processed. Please review the awards for correctness. Remember to 'Submit' your changes if you make further adjustments. Otherwise, check back periodically for updates to your financial aid package.

**Last Updated:** 10/06/2004 3:05:16PM  **Status:** Successful

<table>
<thead>
<tr>
<th>Award</th>
<th>Category</th>
<th>Career</th>
<th>Offered</th>
<th>Accepted</th>
<th>Accept</th>
<th>Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>FASS: Grant</td>
<td>Grant</td>
<td>Undergraduate</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FASS: Scholarship</td>
<td>Scholarship</td>
<td>Undergraduate</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Perkins Loan - ELO</td>
<td>Loan</td>
<td>Undergraduate</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sub Staff - Sem</td>
<td>Loan</td>
<td>Undergraduate</td>
<td>2,625.00</td>
<td>2,625.00</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>FASS: Work</td>
<td>Work/Study</td>
<td>Undergraduate</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FASS: Loan</td>
<td>Loan</td>
<td>Undergraduate</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td><strong>5,625.00</strong></td>
<td><strong>2,625.00</strong></td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.  

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

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

---

### Reporting External Awards

This section provides an overview of reporting external awards and lists the pages used to report external awards.

#### Understanding Reporting External Awards

The Reporting External Award component enables students to provide information regarding any external awards not already reflected on their award package. Self-service options control whether the component is accessible from the Accept/Decline and View Financial Aid pages and the Packaging Status Summary page. External awards reported by students are considered a data source to External Award staging tables. All student-reported awards are posted directly to External Award staging tables and automatically set with a processing status of *Reported* and data source of *Self Serve*. The system-set process status of *Reported* on external award transactions reported by the student require administrator review before any potential posting to the student award package.

Administrators use a Comment field to enter the status of self-service reported external awards. They also indicate whether comments should be viewable to a student. These comments are displayed on the Award Detail page, from awards listed on the Aid from Other Aid-Report History page.

#### Pages Used to Report External Awards

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Financial Aid - Aid from Other Sources     | SFA_SS_EA_VIEW    | • Self Service, Student Center, Report Other Financial Aid  
• Self Service, Campus Finances, Aid from Other Sources, (aid year) | Report aid from other sources. When the student clicks the SAVE button, the information is saved to the external award staging table with a status of *Reported*. |
<p>| Financial Aid - Other Financial AidReceived| SFA_SS_EA_ENTRY   | Click the REPORT ADDITIONAL AID button on the Financial Aid - Aid from Other Sources page. | Report aid from other sources. When the student clicks the SAVE button, the information is saved to the external award staging table with a status of <em>Reported</em>. |
| Financial Aid - Aid from Other Sources - Report History | SFA_SS_EA_HISTORY | Click the View My Reporting History link on the Financial Aid - Aid from Other Sources page. | View all student-reported transactions. Use the Award link to access student award details and any administrative comments made visible to self-service. |</p>
<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Aid from Other Sources - Award Detail</td>
<td>SFA_SS_EA_DETAIL</td>
<td>Click the award description to view award details.</td>
<td>View award details, such as processing status, for an external award. Also view a list of other external awards that might make up the total award amount. When accessed from the Report History page, award details can include comments from the administrator. The Award Details page is available when the award name is highlighted.</td>
</tr>
</tbody>
</table>

**Printing the FE FAN Letter**

When students click the View Award Notification link from the Financial Aid - Award Summary page or the Financial Aid - Award Package page, a pop-up window displays the Award Notification letter in PDF format.

**Selecting a Lender**

This section provides an overview of lender selection and discusses how to view lenders selected by the students.

**Understanding Lender Selection**

Lender Selection enables students to select an FFELP lender or to change a previously assigned lender:

- If the student has not been awarded, the system provides a Student Finances link to indicate a lender to be picked up by Loan Origination.
- If a student has been awarded an FFELP loan, the system displays the lender and provides a link that enables the student to change the lender if the loan is not originated or transmitted to the guarantor.
- If a student changes the lender after borrowing from another lender, a message is optionally displayed to warn them against doing so for repayment reasons.
- If the loan has been originated or transmitted, the lender is displayed but the student cannot change it. A message tells the student to contact the financial aid office if they need to change the lender.
Pages Used to Select and View a Lender

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lender Select</td>
<td>SS_LNDR_SELECT</td>
<td>Click the Select Your Lender link on the Financial Aid - Award Detail page .</td>
<td>Select or change a lender. The student can select one lender for all loans. After the student clicks the SUBMIT button, the student cannot change lenders without contacting the financial aid office.</td>
</tr>
<tr>
<td>Selected Lenders</td>
<td>SS_LNDR_SELECT</td>
<td>Financial Aid, Loans, View Lender Selection</td>
<td>View the lenders that students selected through Campus Self Service.</td>
</tr>
</tbody>
</table>

Viewing a Student's Lender Selection Record

Access the Selected Lenders page (Financial Aid, Loans, View Lender Selection).

Image: Selected Lenders page, Lender Information tab

This example illustrates the fields and controls on the Selected Lenders page, Lender Information tab. You can find definitions for the fields and controls later on this page.

The Lender Information tab displays the lender that was selected by the student through Campus Self Service.
Select the Guarantor Information tab.

**Image: Selected Lenders page, Guarantor Information tab**

This example illustrates the fields and controls on the Selected Lenders page, Guarantor Information tab. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>ID:</th>
<th>FASS0150</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>PSUNV</td>
</tr>
<tr>
<td>Practice Date</td>
<td>07/15/2006</td>
</tr>
</tbody>
</table>

The Guarantor Information tab displays the guarantor that was associated to the lender selected by the student. The guarantor is associated to the lender based on values defined on the Identify Self Service Lenders page.

**Note:** The Lender and Guarantor values on this page are used to determine the correct loan destination during loan origination. If the Guarantor values are missing, it is possible that the loan could be originated with no loan destination found.

**Processed Date**

Displays the date that the student selected the lender in Campus Self Service.

### Completing a Loan Counseling Requirement

This section provides an overview of a loan counseling requirement and lists the page used to complete a loan counseling requirement.

### Understanding a Loan Counseling Requirement

After the student accepts an award and the loan is originated, the system displays a link to entrance interview information for each award. This URL is specified on the Loan Counseling page and associated display parameters are set on the Loan Options page.

The student clicks the link to access the loan information. After the student demonstrates familiarity with the information, the administrator can change the Loan Entrance Interview Status field value on the Packaging Status Summary page from *Inst Req* to *Completed*.

Similarly, if an exit interview is required, the link is displayed in the program completion timeframe set on the Loan Counseling page. The student accesses the information and after demonstrating familiarity with the information, the administrator changes the Exit Interview field value on the Packaging Status Summary page from *Inst Req* to *Completed*. 
Page Used to Complete a Loan Counseling Requirement

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance/Exit Loan Counseling</td>
<td>SS_LN_COUNSEL</td>
<td>Self Service, Campus Finances, View Financial Aid, Award Summary, Loan Counseling link</td>
<td>Click the Award Description link to access the URL that has been selected on the Loan Counseling page to display loan requirement details for this award.</td>
</tr>
</tbody>
</table>

Using Entry Points into the Perkins eMPN Process

This section provides an overview of Perkins eMPN functionality and discusses how to:

- View Perkins loan award details.
- View Perkins loan award summary.

Understanding Perkins eMPN Functionality

The Perkins eMPN process supports the requirement that schools use the Perkins Master Promissory Note (MPN) and provide the option for students to complete and sign their Perkins MPN electronically. To comply with regulatory disclosure and notification requirements for the federal Perkins loan, the system includes specific disclosure items. In addition, most self-service pages allow for site-defined text so that institutions can include specific wording that satisfies their requirement as a holder of the Perkins loan.

Students can access the eMPN process to view their promissory note information using the Accept/Decline Awards, View Financial Aid, Sign Perkins Promissory Note, or View Perkins Promissory Note menu paths. Contained within the process are pages that acknowledge borrower rights and responsibilities, disclosures, terms and conditions, and important notices to complete the eMPN process. The system presents information to the student using both static data and user-defined text.

The Perkins eMPN pages have cancel buttons so that students can exit the Perkins eMPN process at any point. If a student cancels, the system discards any data that the student entered. When students access the electronic signature process, they are instructed to enter an identity authentication element: NID, DOB, or user-defined PIN. The institution determines the identity authentication prompt during setup. Students must select a check box to indicate consent to proceed with the Perkins eMPN process. The system authenticates the information and captures the date and time of the consent. To continue and complete the process, students must verify that their personal information is correct, provide loan references, review loan indebtedness and repayment schedule, review and accept their rights and responsibilities, and review and electronically sign their federal Perkins Master Promissory Note. The system provides pages for students to review current and history information regarding their Perkins MPN.

Oracle recommends that you use the user-defined text to define instructions and information for your student population. The text on Perkins eMPN pages can be easily modified to best meet your institutional requirements. These user-defined text messages are contained within Message Set Number 14409. Message Set Number 14409, 500 number series, are user-definable messages for Financial Aid Self Service pages.
The system is designed to dynamically provide various entry points within the Campus Finances menu for the student to begin the eMPN process: Sign Perkins Promissory Note, Accept/Decline Awards, and View Financial Aid. The system evaluates whether a valid Perkins MPN is present. At a minimum, the student must accept a Perkins loan before being allowed to access the Perkins eMPN process.

**Note:** If a valid Perkins MPN is present, the system dynamically provides links at entry points for the student to view Perkins Promissory Note history pages.

### Pages Used as Entry Points into the Perkins eMPN Process

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Award Package</td>
<td>SS_FA_AWD_ACK</td>
<td>Self Service, Campus Finances, Accept/Decline Awards, Financial Aid - Award Package</td>
<td>Accept, decline, and reduce awards. This page also facilitates entry into the Perkins eMPN process.</td>
</tr>
<tr>
<td>Financial Aid - Award Detail</td>
<td>SS_FA_AWD_DTL</td>
<td>Click the Federal Perkins Loan – MPN link on the Financial Aid - Award Package page.</td>
<td>View scheduled disbursements by term. This page displays the type of award, date, term, and award amount. It also facilitates entry into the Perkins eMPN process.</td>
</tr>
<tr>
<td>Financial Aid - Award Summary</td>
<td>SS_FA_AWD_SUMM_PER</td>
<td>Self Service, Campus Finances, View Financial Aid, Financial Aid – Award Summary</td>
<td>View a detailed summary of financial aid by aid year. This includes the type of award and the offered and accepted amounts for the aid year and terms within the aid year. This page also facilitates entry into the Perkins eMPN process.</td>
</tr>
<tr>
<td>Accept/Decline Financial Aid - Submit Confirmation</td>
<td>SFA_SUBMIT_CONFIRM</td>
<td>Click the Yes button on the Accept/Decline Financial Aid page.</td>
<td>View submittal confirmation. If the system determines that a Perkins MPN is required, then additional instructions and buttons enable students to access the Perkins eMPN process.</td>
</tr>
</tbody>
</table>

### Viewing Perkins Loan Award Details

If the award has the MPN Required option, the system provides a link to the Perkins Loan Promissory note on the Financial Aid - Award Detail page.

If the award has a completed and valid MPN record, the Perkins Loan Promissory Note link takes the student to the Perkins Promissory note history page. If the award does not have a valid MPN record and the award is accepted, the link takes the student to the introductory page for the Perkins eMPN process.
Viewing Perkins Loan Award Summary

If the item type has the MPN Required option, the award is accepted, and the system determines that a valid MPN has not yet been completed, then the system displays a Sign Perkins MPN link on the Financial Aid - Award Summary page. The student can click the link to access the introductory page for the eMPN process.

The system displays the View Promissory Note link if a valid MPN has been completed for the award. The link directs the student to the View Promissory Note page.

Related Links
Viewing a Detailed Summary of Financial Aid by Aid Year

Signing an Electronic Perkins eMPN

This section discusses how to:

• Review Perkins eMPN introductory information.
• Enter an ID authentication and provide consent.
• Verify personal information.
• Provide loan references.
• Review loan indebtedness.
• Accept borrower rights and responsibilities.

Pages Used to Sign an Electronic Perkins MPN

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Select Aid Year to View</td>
<td>SFA_SS_EMPN_AY_SEL</td>
<td>Self Service, Campus Finances, Sign Perkins Promissory Note, Financial Aid - Federal Perkins Master Promissory Note</td>
<td>Select the aid year that you want to view.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (Introductory Information)</td>
<td>SFA_SS_EMPN_START</td>
<td>Click the Aid Year link on the Financial Aid - Select Aid Year to View page.</td>
<td>Review introductory information and instructions to proceed with the electronic MPN. User-defined text messages for this page are contained within Message Set Number 14409, 560–570 series.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (ID and Consent)</td>
<td>SFA_SS_EMPN_AUTH</td>
<td>Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (Preliminary Information) page.</td>
<td>Review steps for completing the electronic signature and provide identity authentication and acknowledge consent to proceed with the eMPN process. User-defined text messages for this page are contained within Message Set Number 14409, 571.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information)</td>
<td>SFA_SS_PERK_EMPN1</td>
<td>Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (ID and Consent) page.</td>
<td>Verify name, address, telephone, and demographic information.</td>
</tr>
<tr>
<td>Addresses</td>
<td>SS_ADDRESSES</td>
<td>Click the Click to update Address link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.</td>
<td>Update address information.</td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>SS_CC_PERS_PHONE</td>
<td>Click the Click to update Phone link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.</td>
<td>Update telephone numbers.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References)</td>
<td>SFA_SS_PERK_EMPN2</td>
<td>Click the Confirm button on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.</td>
<td>Enter loan references information. User-defined text messages for this page are contained within Message Set Number 14409, 572.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness)</td>
<td>SFA_SS_PERK_EMPN3</td>
<td>Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page.</td>
<td>Review the total federal Perkins loan amount that the student has incurred at your institution. Amounts are determined by the valid school code for institution setup. Students can use this page to view a statement of the total cumulative balance they owe and an estimate of the monthly payment amount. User-defined text messages for this page are contained within Message Set Number 14409, 573.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities)</td>
<td>SFA_SS_PERK_EMPN4</td>
<td>Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness) page.</td>
<td>Accept borrower's rights and responsibilities. User-defined text messages for this page are contained within Message Set Number 14409, 574–576 series</td>
</tr>
</tbody>
</table>
### Reviewing Perkins eMPN Introductory Information

Access the Financial Aid – Federal Perkins Master Promissory Note (Introductory Information) page (click the Aid Year link on the Financial Aid - Select Aid Year to View page).

The Financial Aid - Federal Perkins Master Promissory Note (Introductory Information) page represents the first page in the Perkins eMPN process. This page introduces a student to the Perkins eMPN process and provides a listing of items that should be readily available before continuing. The page provides the means to define key elements within the eMPN process. To assist the student, a listing of information is available prior to continuing the eMPN process. Item 1 is a controlled item and automatically adjusts based on the authentication method option selected on the self-service awarding option for the Perkins MPN.

The student selects the REQUEST PAPER MPN (request paper master promissory note) button to request a paper MPN. The system displays a PDF version of the Perkins MPN in a new window.

### Entering an ID Authentication and Providing Consent


If your institution set the Authentication Method option on the Awarding Options page to *No authentication*, the system does not display text that requests students to enter an identity authentication on the Financial Aid - Federal Perkins Master Promissory Note (ID and Consent) page.

Oracle recommends that you use the user-defined text message delivered with this product to define instructions for your students. For example, your institution might require additional consent items to satisfy disclosure requirements. The Perkins eMPN user-defined text messages are contained within the Message Set Number 14409.
Verifying Personal Information


Regulations require a permanent address to be captured on the Perkins MPN. The Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page displays the most current permanent address and home telephone number for the student. Students can use the available links on the page to access the Self Service Campus Personal Information address and home components. If students click either the address or phone update link, they are removed from the eMPN process and must begin the eMPN process from the start.

**Note:** The system does not allow a student to proceed without a current permanent address.

Providing Loan References

Access the Financial Aid – Federal Perkins Master Promissory Note (Provide Loan References) page (click the Confirm button on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page).

The Perkins eMPN process requires that the student provide at least two loan references. Institutions can require up to three additional loan references. If additional references are required, the system adds an extra step on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page. The third step requests that the student provide additional references beyond the two.

Reviewing Loan Indebtedness

Access the Financial Aid – Federal Perkins Master Promissory Note (Review Loan Indebtedness) page (click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page).

On the Financial Aid – Federal Perkins Master Promissory Note (Review Loan Indebtedness) page, the Federal Perkins Loan Amount to Date field indicates the amount based on awards associated with the Perkins aggregate.

The award amount represents any financial aid item type for which the aggregate area is tied to Perkins, even if the item type is not flagged as MPN-required. The system keys loan history amounts by school code. Therefore, the system consolidates and displays only loan amounts that are associated with valid school codes for the institution.

Accepting Borrower Rights and Responsibilities


The Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities) page provides the student (borrower) the necessary disclosures regarding rights and responsibilities. The entire text displayed is user-defined text. Oracle recommends that schools adjust the text to satisfy necessary disclosure requirements.
Requesting and Signing a Paper Perkins MPN

This section provides an overview of paper MPN requests and lists the pages used to request and sign a paper Perkins MPN.

Understanding Paper Perkins MPN Requests

Regulations require that a student (borrower) be given the opportunity to exit the Perkins eMPN process, and instead, request a paper Perkins MPN. When the student requests a paper Perkins MPN, the system generates a PDF version of the Perkins MPN with both Sections A and B completed. The system instructs the student to print, complete, and return the Perkins MPN to the financial aid office.

When the system generates a paper Perkins MPN, it creates a Perkins MPN record with the MPN format equal to paper. The system considers this Perkins MPN invalid until a signature date is entered.

Note: If the paper Perkins MPN remains invalid, the student can return and attempt the Perkins eMPN process again. If the student completes and electronically signs the Perkins MPN, the system cancels the previous paper Perkins MPN and creates a subsequent Perkins MPN indicating a completed electronic Perkins MPN.

Pages Used to Request and Sign a Paper Perkins MPN

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Perkins Master Promissory Note</td>
<td>SFA_SS_EMPN_PAPER</td>
<td>Click the Request Paper MPN link on the Financial Aid - Federal Perkins Master Promissory Note (Preliminary Information) page.</td>
<td>Confirm a request for a paper MPN. The student is requested to print, complete, and return the signed paper promissory note.</td>
</tr>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note</td>
<td>SFA_SS_EMPN_EXISTS</td>
<td>Click the Continue button on the Federal Perkins Master Promissory Note page.</td>
<td>View a reminder to turn in the signed paper MPN to the financial aid office.</td>
</tr>
</tbody>
</table>

Viewing a Perkins MPN

This section lists the pages used to view Perkins promissory notes.

Pages Used to View a Perkins Promissory Note

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Federal Perkins Master Promissory Note (View MPN Information)</td>
<td>SFA_SS_EMPN_VIEW</td>
<td>Self Service, Campus Finances, View Perkins Promissory Note, Federal Aid - Federal Perkins Master Promissory Note</td>
<td>View Perkins MPN information. User-defined text messages for this page are contained within Message Set Number 14409, 578.</td>
</tr>
</tbody>
</table>
Using Administrative Requests

This section provides an overview of administrative requests, known to the student as Request Counselor Action, and lists the page used to initiate and update administrative requests.

Understanding Administrative Requests

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

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

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

Page Used for Administrative Requests

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Request Counselor Action</td>
<td>SS_FA_AWD_REQ</td>
<td>Click the Request Counselor Action link on the Financial Aid - Award Package page.</td>
<td>Request a change or meeting, or withdraw aid application. If a request is open, additional requests are appended to that existing request. If it is closed, additional requests are treated as new requests.</td>
</tr>
</tbody>
</table>

Viewing Student Self-Service Pages by Aid Year

This section provides an overview and lists the pages used to view student self service pages by aid year:
Understanding Viewing Self-Service Inquiry Pages by Aid Year

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

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

If the Allow Access check box is clear on the Self Service Options page, the system displays No self service access for this aid year. If the Inquiry Access check box is clear on the Packaging Status Summary page for this student, the system displays Inquiry access denied.

Students select the aid year to view. If a student has aid for more than one career in the aid year or award period, this link accesses the Financial Aid - Select Career to View page. If not, it accesses the Financial Aid - Award Summary page.

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

Related Links
Understanding Campus Self Service for Financial Aid
Defining Self-Service Options

Pages Used to View Student Self-Service Pages by Aid Year

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Select Aid Year to View</td>
<td>SS_FA_AWD_AY_SEL</td>
<td>Self Service, Campus Finances, View Financial Aid, Financial Aid – Select Aid Year to View</td>
<td>Select an aid year to view.</td>
</tr>
<tr>
<td>Financial Aid - Award Summary</td>
<td>SS_FA_AWD_SUMM_ALL</td>
<td>Click the Aid Year link on the Financial Aid - Select Aid Year to View page.</td>
<td>View a detailed summary of financial aid by aid year. This includes the type of award and the offered and accepted amounts for the aid year and terms within the aid year.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Aid - Financial Aid Eligibility</td>
<td>SS_FA_AY_SUMMARY</td>
<td>Click the Financial Aid Eligibility link on the Financial Aid - Award Summary page.</td>
<td>View financial aid eligibility by aid year. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need. The title of this page and the name of the link leading to it are set in the Summary Link Label field on the Inquiry Options page (Set UP SACR, Common Definitions, Self Service, Financial Aid, Self Service Options, Inquiry Options).</td>
</tr>
<tr>
<td>Financial Aid - Expected Family Contribution</td>
<td>SS_FA_EFC_SUMMARY</td>
<td>Click the Expected Family Contribution amount link on the Financial Aid - Financial Aid Eligibility page.</td>
<td>View expected family contribution by aid year for both parent and student.</td>
</tr>
<tr>
<td>Financial Aid - Select Career to View</td>
<td>SS_FA_AY_CAR_SEL</td>
<td>Click the Total Aid amount link on the Financial Aid - Financial Aid Eligibility page.</td>
<td>Select a career to view by aid year.</td>
</tr>
<tr>
<td>Financial Aid - Loan Application Information</td>
<td>SS_FA_LOAN_DETAIL</td>
<td>Click the Loan Application Information link on the Financial Aid - Award Summary page.</td>
<td>View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.</td>
</tr>
<tr>
<td>Financial Aid - Declined Awards</td>
<td>SS_FA_AWD_ALL_CD</td>
<td>Click the View Declined Awards link on the Financial Aid - Award Summary page.</td>
<td>View declined awards by aid year. This view is available if your institution entered Aid Year in the View Summary By field on the Self Service Options page.</td>
</tr>
<tr>
<td>Financial Aid - Canceled Awards</td>
<td>SS_FA_AWD_ALL_CD</td>
<td>Click the View Canceled Awards link on the Financial Aid - Award Summary page.</td>
<td>View canceled awards by aid year. This view is available if your institution entered Aid Year in the View Summary By field on the Self Service Options page.</td>
</tr>
</tbody>
</table>
### Using Financial Aid Self Service

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Scheduled Disbursements</td>
<td>SS_FA_AWD_TERM_DTL</td>
<td>Click the View Scheduled Disbursement Dates link for the term in the scroll area on the Financial Aid - Award Summary page.</td>
<td>View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term. The system displays awards that have been offered but not accepted by the student with a blank disbursement date.</td>
</tr>
</tbody>
</table>

### Viewing Student Self-Service Pages by Award Period

This section lists the pages used to view student self-service pages by award period. Most pages are the same for both aid year and award period options.

If your institution enters *Award Period* in the View Data By field on the Inquiry Options page, the system displays the data by award period.

#### Pages Used to View Student Self-Service Pages by Award Period

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid - Select Aid Year to View</td>
<td>SS_FA_AWD_AY_SEL</td>
<td>Self Service, Campus Finances, View Financial Aid, Financial Aid - Select Aid Year to View</td>
<td>Select an award period to view.</td>
</tr>
<tr>
<td>Financial Aid - Award Summary</td>
<td>SS_FA_AWD_SUMM_PER</td>
<td>Click the link on the Financial Aid - Select Aid Year to View page designating the aid year that you want to view.</td>
<td>View a detailed summary of financial aid by award period. This includes the type of award and the offered and accepted amounts for the academic year and terms within the award period.</td>
</tr>
<tr>
<td>Financial Aid - Financial Aid Eligibility</td>
<td>SS_FA_AP_SUMMARY</td>
<td>Click the Financial Aid Eligibility link on the Financial Aid - Award Summary page.</td>
<td>View financial aid eligibility by award period. This includes estimated financial aid budget, expected family contribution, estimated need, total aid, and remaining need.</td>
</tr>
<tr>
<td><strong>Page Name</strong></td>
<td><strong>Definition Name</strong></td>
<td><strong>Navigation</strong></td>
<td><strong>Usage</strong></td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Aid - Expected Family Contribution</td>
<td>SS_FA_EFC_BY_AP</td>
<td>Click the Expected Family Contribution amount link on the Financial Aid - Financial Aid Eligibility page.</td>
<td>View expected family contribution by award period. This includes both parent and student.</td>
</tr>
<tr>
<td>Financial Aid - Select Career to View</td>
<td>SS_FA_AP_CAR_SEL</td>
<td>Click the Total Aid amount link on the Financial Aid - Award Summary page.</td>
<td>Select a career to view by award period.</td>
</tr>
<tr>
<td>Financial Aid - Loan Application Information</td>
<td>SS_FA_LOAN_DETAIL</td>
<td>Click the Loan Application Information link on the Financial Aid - Award Summary page.</td>
<td>View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.</td>
</tr>
<tr>
<td>Financial Aid - Declined Awards</td>
<td>SS_FA_AWD_PER_CD</td>
<td>Click the View Declined Awards link on the Financial Aid - Award Summary page.</td>
<td>View declined awards. This view is available to the student if the institution entered <em>Award Period</em> in the View Summary By field on the Self Service Options page.</td>
</tr>
<tr>
<td>Financial Aid - Canceled Awards</td>
<td>SS_FA_AWD_PER_CD</td>
<td>Click the View Canceled Awards link on the Financial Aid - Award Summary page.</td>
<td>View canceled awards. This view is available to the student if the institution entered <em>Award Period</em> in the View Summary By field on the Self Service Options page.</td>
</tr>
<tr>
<td>Financial Aid - Scheduled Disbursements</td>
<td>SS_FA_AWD_TERM_DTL</td>
<td>Click the link for the term in the scroll area on the Financial Aid - Award Summary page.</td>
<td>View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term.</td>
</tr>
</tbody>
</table>

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Chapter 27

Using Self-Service Transfer Credit

Viewing Transfer Credit Reports Through Self-Service Pages

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

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

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Transfer Credit Report</td>
<td>SS_TRCR_RPT</td>
<td>Self Service, Transfer Credit</td>
<td>Students can view all of their course, test, and other transfer credit that your academic institution has submitted for posting to their student enrollment records.</td>
</tr>
</tbody>
</table>

Evaluating Transfer Credit Through Self-Service Pages

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

Understanding the Self-Service Modeling Transfer Credit Feature

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

Within the what-if model, users can run a degree progress analysis that also includes all courses on the individual's record that are in a "completed" or "posted" transfer model. This way, for prospects and applicants with completed (but not posted) transfer models on file, the system automatically articulates and evaluates these courses in the what-if degree audit.

Users have access to the self-service Modeling Transfer Credit feature based on their role and the underlying component permissions. Visitors—individuals who have not formally applied to your institution—can access the Evaluate My Transfer Credit self-service pages if your institution creates for them user IDs (with roles that grant them access to the pages). You can also provide prospects, applicants, and students access to the Evaluate My Transfer Credit self-service pages.
The Self-Service Modeling Transfer Credit feature stores the data it creates in its own tables separate from the tables the Student Records feature uses. This separation ensures the data integrity of official transfer credit records. However, the page elements of the self-service feature prompt against the setup tables of the Student Records Transfer Credit feature, making the setup for the Transfer Credit feature a prerequisite for the self-service feature. Before a user can evaluate transfer credit scenarios, you must define academic institutions, careers, programs, terms, courses, course transfer equivalency rules, and academic program and source equivalencies.

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

**Note:** The advisement report generated from the Evaluate My Transfer Credit component will always evaluate posted, completed, and self-reported transfer credit.

**Related Links**
"Understanding the Transfer Credit Business Process" (PeopleSoft Campus Solutions 9.0: Student Records)

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

- Set up your system for academic advisement.
  
  See Academic Advisement

- Define an advisement report type to be used with the Evaluate My Transfer Credit component.
  
  See "Setting Up Advisement Report Types" (PeopleSoft Campus Solutions 9.0: Academic Advisement).

- Define academic institutions.
  
  See "Defining Academic Institutions" (PeopleSoft Campus Solutions 9.0: Application Fundamentals).

**Pages Used to Evaluate Transfer Credit Through Self-Service Pages**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate My Transfer Credit</td>
<td>SS_TRCR_SRCH</td>
<td>Self Service, Transfer Credit, Evaluate My Transfer Credit</td>
<td>Individuals can use this page to select (for editing) or delete an existing course transfer credit model that they have previously created, or begin creating a new model.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Evaluate My Transfer Credit</td>
<td>SS_TRCR_TARGET</td>
<td>- Self Service, Transfer Credit, Evaluate My Transfer Credit</td>
<td>Individuals can use this page to select the required target information for their course transfer credit model. Target information includes the academic institution, career, program, and plan to which they want to apply the course transfer credit, and the articulation term. To assist individuals in entering this information, the page elements prompt against the academic institution, academic career, academic program, academic plan and term tables. The program of study and major (plan) field prompt values are based on those for which you have defined course transfer equivalency rules.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Create New Model button on the Evaluate My Transfer Credit page.</td>
<td></td>
</tr>
<tr>
<td>Evaluate My Transfer Credit</td>
<td>SS_TRCR_SOURCE</td>
<td>- Self Service, Transfer Credit, Evaluate My Transfer Credit</td>
<td>Individuals can use this page to enter the external organization or internal academic institution from which the individual is transferring. To assist individuals in entering this information, the page elements prompt against the course transfer rules tables to ensure that you institution has established a course transfer rule for the external organization or internal academic institution.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Next button on the Transfer Credit Model Information page.</td>
<td></td>
</tr>
<tr>
<td>Evaluate My Transfer Credit</td>
<td>SS_TRCR_INTCR</td>
<td>- Self Service, Transfer Credit, Evaluate My Transfer Credit</td>
<td>Individuals who are creating internal course transfer credit models can use this page to view their coursework for at the specified internal academic institution. The system automatically loads their enrollment information into the page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select a source career and institution and click the Next button on the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transfer Credit Source Information page.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
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<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Evaluate My Transfer Credit - Education Data</td>
<td>SS_TRCR_EDUC</td>
<td>• Self Service, Transfer Credit, Evaluate My Transfer Credit&lt;br&gt;• Select an external institution and click the Next button on the Transfer Credit Source Information page.</td>
<td>Individuals who are creating external course transfer credit models can use this page to enter their external education information. This information includes the external year and term, term type, external subject area, course number, units taken, and grade received. The system does not use the education data table to retrieve and store this information. The system instead requires the individual to enter the information, which it then stores on a set of tables unique to the Self-Service Modeling Transfer Credit feature.</td>
</tr>
<tr>
<td>Evaluate My Transfer Credit - Transfer Credit Results</td>
<td>SS_TRCR_RSLT</td>
<td>• Self Service, Transfer Credit, Evaluate My Transfer Credit&lt;br&gt;• Click the Submit button on the Education Data page or on the Current Coursework page.</td>
<td>Individuals can use this page to view the results of the Self-Service Transfer Credit Evaluation process for the model. The system displays the transfer credit summary report in a grid at the bottom of the page. Individuals can use the browser print function to print the page. Individuals can click the View Details button to see additional information about the incoming courses and their internal equivalents. The evaluation is tentative pending final review by your academic institution.</td>
</tr>
<tr>
<td>Evaluate My Transfer Credit - Transfer Credit Results Detail</td>
<td>SS_TRCR_RSLT_DTL</td>
<td>• Self Service, Transfer Credit, Evaluate My Transfer Credit&lt;br&gt;• Click the View Transfer Equivalency Details button on the Transfer Credit Results page.</td>
<td>Individuals can use this page to view incoming course and internal equivalent information. The system displays each incoming course beside its internal equivalent course. The system captures but hides the valid attempts, earn credit, and include in GPA fields.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------</td>
<td>------------</td>
<td>-------</td>
</tr>
</tbody>
</table>
| Evaluate My Transfer Credit – Generate a What-If Advisement Report | SS_TRCR_AA_RQST | • Self Service, Transfer Credit, Evaluate My Transfer Credit  
• Click the Next button on the Transfer Credit Results page. | Individuals can use this page to review the institution, career, program and term selected and to re-select a major. Then, they can generate an advisement report based on that what-if information. The degree audit takes into consideration their completed and self-report transfer credit. Ultimately, individuals can see how the internal equivalents of their transfer credit model apply towards their what-if degree requirements.  
The advisement report that is generated shows them their possible degree progress based on the transfer credit model. For prospective students, the process uses the target academic program and internal equivalent courses, which become the what-if courses, during the creation of the degree progress report. For applicants and students, the process uses the target academic program and internal equivalent courses of the model, completed and posted transfer credit models, and enrollment records during the creation of the advisement report. |
Chapter 28

Using Academic Advisement Self Service

Prerequisites for Using Academic Advisement Self Service

To take full advantage of the self-service features, including the course planning feature (known as My Planner), class planning feature (known as the Shopping Cart) and enrollment capabilities, your institution must, for example:

- Set up courses in the course catalog.
- Schedule classes.
- Define advisement report types.
- Identify those report types for use in self-service on the Academic Institution 7 page.
- Run those report types in batch (one for My Academic Requirements and one for My Planner and Search by My Requirements).
- Decide how the reports will be refreshed (real-time, for example).
- Establish a plan for periodically refreshing those reports in batch.

A number of users – prematriculated students, students, and advisors – can take advantage of some of the Academic Advisement self-service features. To do so requires an EMPLID and a user profile that enables them to access and use the self-service pages.

The What-If Report – What-if Report Selection page and the What-If Report – Create What-if Scenario page are designed for use by advisors, students, and prematriculated students (for example, prospective students). But you must provide your users with access to the respective pages: SAA_SS_WHATIF_SEL and SAA_SS_WHATIF.

Other self-service pages are designed for students only and are accessible to active students only (students whose program status is active.) Examples are My Planner, Plan by My Requirements and Search by My Requirements.

If your institution is processing degree progress reports using transcript types (versus advisement report types), you must turn off security to the component, SAA_SS_DPR_ADB.

**Important!** Before users can view the interactive advisement report in self-service, your institution must first generate the relevant report types for the students, either in batch or individually, using the administrative components.

**Related Links**

Setting Up Self-Service Features for Academic Advisement

"Setting Up Advisement Report Types" (PeopleSoft Campus Solutions 9.0: Academic Advisement)
Viewing an Advisement Report

This section provides an overview of My Academic Requirements and lists the pages used to view an advisement report.

Understanding My Academic Requirements

The self-service functionality provides students with an interactive advisement report that they can use to evaluate their academic progress, access course and class detail, add courses to their planner, place classes in their shopping carts, and enroll in classes. The system can generate the report in real time and the report displays a date and time stamp so that the user knows when the report was last generated.

Depending on your Installation Student Administration setup, you can implement the advisement report using either the Academic Advisement or the Program Guide installation option.

If your institution uses Academic Advisement, the My Academic Requirements page reflects the results of a degree audit. When students access the My Academic Requirements page, satisfied academic requirement groups are collapsed, and unsatisfied ones are expanded. Data about the degree requirements appears in hierarchical structure that corresponds with your institution's advisement setup. For example, a requirement and its contents appear below a heading for a requirement group. In general, lists of courses that may be used or are used to satisfy a given requirement appear below the requirement line, which in turn appears below the requirement. Requirement group report descriptions appear in group boxes, and details about requirements, which are attached to the requirement groups, appear below the requirement groups. Examples of these details include report long descriptions, course statistics, and course lists. Whether specific details, such as requirement line data, appear depends on the setup of your institution. When details are available for a student to view, a caret appears next to the requirement group, requirement, or requirement line, as needed. The icons in the legend and the statuses of Satisfied and Not Satisfied communicate the completion status of the courses and degree requirements. If there are exceptions that your institution has made to a student’s degree requirements, those also appear on the interactive report. For example, if a change was made so that a student needs to take three credits instead of six for a given requirement, the explanation about the change will be accessible in the relevant area of the report (next to the units required). Similarly, if a course directive (substitution) was made, a Notes column will appear on the report, in the course grid next to the replacement course. A hyperlink directs the user to the explanation about the exception.

The setup of your institution determines whether the report is generated in real time, and it affects which details appear on the report. For example, your institution controls whether a requirement line long description appears on the report or whether the course list should appear. The icons that appear in the legend of the report are dictated by the setup of the advisement report type. The advisement report type setup also dictates whether the report reflects the evaluation of in-progress, what-if, shopping cart, and planned courses. Additionally, you define (on the Define Advisement Report Types page) the other attributes of the report, such as whether topics should display on the report, or whether the audit should evaluate completed or self-reported transfer credit models.

If your institution selects the Program Guide installation option, then the report that appears on the My Academic Requirements page has a different look because the data comes from the Program Guide requirements. Because no degree audit is performed against Program Guide rules, the report does not indicate whether a rule is satisfied or not. Instead, My Academic Requirements displays descriptive
information from the Program Guide course lists, requirements, and requirement groups. Courses taken, planned, and in progress appear on the report, but a student, along with his advisor, must evaluate his degree progress. Students can still use the Program Guide report to plan or enroll in courses.

See Setting Up Self-Service Features for Academic Advisement.

Using the Search by My Requirements feature, students can access additional information and perform these actions:

- Access course details.
- View wildcard course list information.
- View information about exceptions and overrides.
- Add classes to their shopping cart.

**Pages Used to View an Advisement Report**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Academic Requirements</td>
<td>SAA_SS_DPR_ADB</td>
<td>Self Service, Degree Progress/Graduation, My Academic Requirements</td>
<td>Students assess academic progress toward graduation, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.</td>
</tr>
<tr>
<td>My Academic Requirements</td>
<td>SAA_SS_DPR_AAL</td>
<td>Self Service, Degree Progress/Graduation, My Academic Requirements</td>
<td>Students review their program guide, courses taken, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.</td>
</tr>
<tr>
<td>My Academic Requirements – Course Detail</td>
<td>SSS_CRSE_OFFER_DTL</td>
<td>Self Service, Degree Progress/Graduation, My Academic Requirements</td>
<td>Students review course details, add a course to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.</td>
</tr>
<tr>
<td>My Academic Requirements - Course List Detail</td>
<td>SAA_SS_DPR_AAL_WC</td>
<td>Self Service, Degree Progress/Graduation, My Academic Requirements</td>
<td>View details about a course list.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>My Academic Requirements</td>
<td>SAA_SS_DPR_ADB_DTL</td>
<td>Self Service, Degree Progress/Graduation, My Academic Requirements</td>
<td>View a description of any exception or override that affects the course or the requirement group, requirement or requirement line.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the numeric link in the Notes column (if applicable).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Or, if the exception is a change, click the Note link to view the details of the change.</td>
<td></td>
</tr>
<tr>
<td>What-If Report – What-if Report Selection</td>
<td>SAA_SS_WHATIF_SEL</td>
<td>Self Service, Degree Progress/Graduation, View What-if Report</td>
<td>Student or prematriculated student can view an existing report or initiate the steps to create a new what-if advisement report.</td>
</tr>
<tr>
<td>What If Report</td>
<td>SAA_SS_DPR_ADB</td>
<td>Click the report date link on the What-If Report – What-if Report Selection page.</td>
<td>Student or prematriculated student can view a saved what-if report.</td>
</tr>
<tr>
<td>What-If Report – Create What-if Scenario</td>
<td>SAA_SS_WHATIF</td>
<td>Click the Create New Report button on the What-If Report – What-if Report Selection page.</td>
<td>Student or prematriculated student can define a what-if scenario and generate a what-if advisement report. Depending on the setup, the student may also be able to define a course what-if scenario.</td>
</tr>
<tr>
<td>What If Report – Select Course for What-if Scenario</td>
<td>SSS_BROWSE_CATLG</td>
<td>Click the Browse Course Catalog button on the Create What-if Scenario page.</td>
<td>Student or prematriculated student can select courses for the what-if scenario.</td>
</tr>
</tbody>
</table>

**Searching for Classes by Academic Requirements**

This section provides an overview of the Search by My Requirements feature and lists the pages used to access this feature.

**Understanding Search by My Requirements**

The Search by My Requirements feature enables students to search for classes based on their degree requirements. The information that appears on the page is based on the student's most recently run advisement report, but the presentation of the information varies from that shown on the My Academic Requirements page because the student using the information intends to enroll in a class.

The main difference between the Search by My Requirements and My Academic Requirements pages is that the course lists include courses offered for the selected term only. Also, whereas the institution may or may not include planned courses on the My Academic Requirements report type, the data included on the Search by My Academic Requirements includes planned courses. As with My Academic Requirements, the data reflects the report type and other advisement setup. Finally, students must be eligible to enroll in order to search for classes by academic requirements.
If your institution selects the Program Guide installation option, then the report that appears in Search by My Academic Requirements looks and operates differently because the data comes from the Program Guide requirements. Also, because no degree audit is performed against Program Guide rules, the report does not indicate whether a degree requirement is satisfied or not.

Using the Search by My Academic Requirements feature, students can access these additional details and perform these actions:

- Access course detail.
- Add courses to their planner.
- View class sections.
- View wildcard course list information.
- View information about exceptions and overrides.

### Pages Used to Search by My Requirements

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Classes - Search by My Requirements</td>
<td>SAA_SS_DPR_ADB_SR</td>
<td>Self Service, Enrollment, Enrollment: Add Classes</td>
<td>For a selected term, a student can search for classes based on his or her degree requirements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select the term (as needed).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Change button (as needed).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the My Requirements option.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click Search.</td>
<td></td>
</tr>
<tr>
<td>Add Classes - Course Detail</td>
<td>SSS_CRSE_OFFER_DTL</td>
<td>From the Add Classes – Search by My Requirements page, click a link for a course description.</td>
<td>Students review course details, view class sections for the selected term, and, if term activated, add a class to their shopping cart. Students can also view their course schedule and shopping cart contents for the selected term.</td>
</tr>
</tbody>
</table>

### Viewing Advisee Information Through Self-Service Pages

This section lists the pages used to view advisee information using self-service pages.
## Pages Used to View Advisee Information Through Self-Service

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Advisees</td>
<td>SSS_ADVISEE_LIST</td>
<td>Self Service, Advisor Center, My Advisees</td>
<td>An advisor can view a list of his or her advisees and access other academic and personal information about them, for example, class schedules, term progress, transfer credit reports, and transcripts.</td>
</tr>
<tr>
<td>Advisee's Student Center (</td>
<td>SSS_ADVISEE_LIST</td>
<td>Click the View Data for other Students button on</td>
<td>An advisor can search for an advisee or prospective student and then go to the Advisee Student Center for the selected advisee or prospective student. From the Advisee Student Center, the advisor can access other academic and personal information about the selected advisee or prospective student, for example, class schedules, term progress, transfer credit reports, and transcripts. If the person is a prospective student, the advisor can generate a what-if advisement report based on the prospective student’s intended program of study.</td>
</tr>
<tr>
<td>search)</td>
<td></td>
<td>the My Advisees page.</td>
<td></td>
</tr>
<tr>
<td>My Advisees - Committee</td>
<td>SSS_ADVISEE_COMEMB</td>
<td>Click a committee name on the My Advisees page.</td>
<td>Review committee members, their roles, and their contact numbers.</td>
</tr>
<tr>
<td>Members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advisee Requirements</td>
<td>SAA_SS_DPR_ADB</td>
<td>Click the View Student Details link on the My</td>
<td>Advisors can view a student’s advisement report.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advisees page for a student in the list of</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>advisees and on the Advisee Student Center</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>page, under Academics, select Academic</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Requirement from the drop-down list. Click the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Go button.</td>
<td></td>
</tr>
<tr>
<td>Advisee Requirements -</td>
<td>SSS_CRSE_OFFER_DTL</td>
<td>Click the course description link on the</td>
<td>Advisors can review course details and, if the student is term activated, view class sections for a specific term.</td>
</tr>
<tr>
<td>Course Detail</td>
<td></td>
<td>Advisee Requirements page.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
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<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Advisee Student Center</td>
<td>SSS_STUDENT_CENTER</td>
<td>• Self Service, Advisor Center, Advisee Student Center</td>
<td>Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Advisor Center, My Advisees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Student Details link for an advisee on the My Advisees page or click the Student Center subtab.</td>
<td></td>
</tr>
<tr>
<td>What-If Report – What-if Report</td>
<td>SAA_SS_WHATIF_SEL</td>
<td>On Advisee Student Center, under Academics, select What-if Report from the drop-down list box. Click the Go button.</td>
<td>Advisors can view an existing report or initiate the steps to create a new advisement report for a student or prospective student.</td>
</tr>
<tr>
<td>Report Selection</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What-If Report – Create What-if</td>
<td>SAA_SS_WHATIF</td>
<td>Click the Create New Report button on the What-If Report – What-if Report Selection page.</td>
<td>Advisors can define a what-if scenario for the student or prospective student and generate a what-if advisement report for that individual. Depending on the setup, the advisor may also be able to define a course what-if scenario.</td>
</tr>
<tr>
<td>What-if Scenario</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What If Report – Select Course</td>
<td>SSS_BROWSE_CATLG</td>
<td>Click the Browse Course Catalog button on the Create What-if Scenario page.</td>
<td>Advisors can select courses for the what-if scenario.</td>
</tr>
<tr>
<td>for What-if Scenario</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advisee Assignments</td>
<td>SS_LAM_STD_GR_LST</td>
<td>On Advisee Student Center, under Academics, select Assignments from the drop-down list box. Click the Go button.</td>
<td>Advisors can view advisee's assignments and grades.</td>
</tr>
<tr>
<td>Advisee Course History</td>
<td>SSS_MY_CRSEHIST</td>
<td>On Advisee Student Center, under Academics, select Course History from the drop-down list box. Click the Go button.</td>
<td>Advisors can view advisee's course history.</td>
</tr>
<tr>
<td>Advisee Exam Schedule</td>
<td>SSR_SSENRL_NODATA</td>
<td>On Advisee Student Center, under Academics, select Exam Schedule from the drop-down list box. Click the Go button.</td>
<td>Advisors can view advisee's exam history.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
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<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Advisee Grades</td>
<td>SSR_SSENRL_GRADE</td>
<td>On Advisee Student Center, under Academics, select Grades from the drop-down list box. Click the Go button.</td>
<td>Advisors can view an advisee's grades.</td>
</tr>
<tr>
<td>Advisee Unofficial Transcript</td>
<td>SSS_TSRQST_UNOFF</td>
<td>On Advisee Student Center, under Academics, select Transcript: View Unofficial from the drop-down list box. Click the Go button.</td>
<td>Advisors can view an advisee's unofficial transcript.</td>
</tr>
<tr>
<td>Advisee Transfer Credit</td>
<td>SCC_SUM_TRNSFRCRT</td>
<td>• Self Service, Advisor Center, Advisee Transfer Credit</td>
<td>Advisors can view information such as advisee's course and test credits.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Advisor Center, My Advisees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Student Details link for an advisee.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Transfer Credit subtab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• On Advisee Student Center, under Academics, select Transfer Credit: Report from the drop-down list box. Click the Go button.</td>
<td></td>
</tr>
<tr>
<td>Advisee General Info (general information)</td>
<td>SCC_SUM_PERSONAL</td>
<td>• Self Service, Advisor Center, Advisee General Info</td>
<td>Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Advisor Center, My Advisees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Student Details link for an advisee.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the General Info subtab.</td>
<td></td>
</tr>
<tr>
<td>Advisee Academics</td>
<td>SCC_SUM_ACADEMICS</td>
<td>• Self Service, Advisor Center, Advisee Academics</td>
<td>Advisors can view information such as an advisee's career, program, and term summary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Self Service, Advisor Center, My Advisees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the View Student Details link for an advisee.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Academics subtab.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Degree Progress Report</td>
<td>SS_ES_AARPT_TYPE</td>
<td>On Advisee Student Center, select Degree Progress Report from the drop-down list box. Click the Go button.</td>
<td>Advisors can view or generate an advisee's degree progress report (that is, advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.</td>
</tr>
<tr>
<td>Quick What-If Analysis</td>
<td>SA_REQST_DTL_SEC3</td>
<td>Click the Quick What-If button on the Degree Progress Report page.</td>
<td>Advisors can run a quick what-if scenario for their advisees (on an advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.</td>
</tr>
<tr>
<td>Course List What-If Analysis</td>
<td>SA_REQ_CRSE_WHIF2</td>
<td>Click the Course List What-If button on the Degree Progress Report page.</td>
<td>Advisors can run a course list what-if scenario for their advisees (on an advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.</td>
</tr>
<tr>
<td>Emergency Contacts List</td>
<td>SS_CC_EMRG_CNTCT_L</td>
<td>On Advisee Student Center, under Personal Information, select Emergency Contact.</td>
<td>Advisors can view an advisee's emergency contact information.</td>
</tr>
<tr>
<td>Enrollment Dates</td>
<td>SSR_SSENRL_APPT</td>
<td>On Advisee Student Center, under Enrollment Dates, select details.</td>
<td>Advisors can view an advisee's enrollment appointments.</td>
</tr>
<tr>
<td>Send Notification</td>
<td>SSS_NOTIFY</td>
<td>Advisor Center, My Advisees Select the Notify Selected Advisees or Notify All Advisees button.</td>
<td>Advisors can send notifications to their advisees.</td>
</tr>
<tr>
<td>Advisee To Dos</td>
<td>SS_CC_TODOS</td>
<td>On Advisee Student Center, under To Do List, select details.</td>
<td>Advisors can view an advisee's to do list summary.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------</td>
<td>------------</td>
<td>-------</td>
</tr>
</tbody>
</table>
| Advisee Class Schedule, Weekly Calendar View | SSR_SS_WEEK | • On Advisee Student Center, under Academics, select My Class Schedule.  
• On Advisee Class Schedule, select the Weekly Calendar View. | Advisors can view an advisee's weekly schedule. |
| FERPA Message for Instructor/Advisor | SSR_FERPA_STMNT | Click View FERPA Statement link from any of the Advisor Center subtabs. | Advisors can view the FERPA restrictions and link to the U. S. Department of Education Family Educational Rights and Privacy Act. |

---

### Viewing Self-Service Advisement Transcripts

The self-service Degree Progress Report feature enables students and advisors to process and then view advisement reports (that is, advisement transcripts) that your institution defines for self-service processing. Users of this feature can conduct what-if scenarios and can explore the course requirement consequences of completing additional coursework or of changing the student's program of study.

This section lists prerequisites and lists the pages used to perform self-service advising.

See [Applying for Graduation Using Self-Service Pages](#).

### Prerequisites

Before individuals at your institution can use the self-service Degree Progress Report (advisement transcript) feature, you must:

- Assign student users an active program, a user ID, and a password.
- Assign advisors a valid user ID and password.
- Set up a self-service advising transcript type.
- Turn off security to the component, SAA_SS_DRP_ADB.

### Related Links

"Defining Transcript Types" (PeopleSoft Campus Solutions 9.0: Student Records)
# Pages Used to View Self-Service Advisement Transcripts

<table>
<thead>
<tr>
<th><strong>Page Name</strong></th>
<th><strong>Definition Name</strong></th>
<th><strong>Navigation</strong></th>
<th><strong>Usage</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Progress Report</td>
<td>SS_ES_AARPT_TYPE</td>
<td>Self Service, Degree Progress/Graduation, View Degree Progress Report</td>
<td>Students and advisors can assess academic progress toward graduation. Students and advisors can run what-if reports to simulate additional coursework completion or to simulate a different academic career, program, plan, or subplan.</td>
</tr>
</tbody>
</table>
| Report Results                        | SS_REPORT_RESULT_A         | • Self Service, Degree Progress/Graduation, View Degree Progress Report, Report Results  
                                 | • Self Service, Academic Records, View Unofficial Transcript, Report Results    | Students and advisors can view the advisement transcript.                                                                                                                                                 |
| View Previously Requested Reports     | SS_STUREQ_RSLT             | Click the View a Report that you had previously requested link on the Degree Progress Report page or the Unofficial Transcript page. | Students and advisors can review reports that they requested in the past. To view a specific report, students click the corresponding Go button.                                                              |
| Degree Progress Report - Quick What-If Analysis Report | SA_REQST_DTL_SEC3         | Click the Quick What-If button on the Degree Progress Report page.            | Students and advisors can enter hypothetical career, program, subplan, and requirement term information. Students or advisors must enter a required term for every career, program, plan, or subplan override option that they specify. |
| Degree Progress Report - Course List What-If Analysis | SA_REQ_CRSE_WHIF2         | Click the Course List What-If button on the Degree Progress Report page.      | Students and advisors can enter hypothetical coursework data.                                                                                                                                             |
| Course List What-If Analysis Report - Course Search | STDNT_CRSE_SECPNL         | Click the Search button on the Degree Progress Report - Course List What-If Analysis page. | Students and advisors can select courses for the Course List Analysis report.                                                                                                                                  |
Chapter 29

Using Self-Service Outreach

Understanding PeopleSoft Outreach for Fundraising

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

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

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

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

This section discusses PeopleSoft Outreach business processes.

Related Links
"Understanding Prospect Management" (PeopleSoft Campus Solutions 9.0: Contributor Relations)

PeopleSoft Outreach Business Processes

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

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

- My Action Plan
- Prospect Strategy.
- Prospect Actions.
- Prospect information views for analysis.

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

### Creating and Maintaining the My Prospects Workset

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

This section discusses how to:

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

### Page Used to Create and Maintain the My Prospects Workset

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outreach Workset Initialization/Maintenance</td>
<td>AV_RUNCTL_OUTR</td>
<td>Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Outreach WS Initialization</td>
<td>Run the My Prospects process to generate or regenerate My Prospects worksets for outreach officers.</td>
</tr>
</tbody>
</table>

### Running the My Prospects Process

Access the Outreach Workset Initialization/Maintenance page (Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Initialize CR, Outreach WS Initialization).

When you run this process, the system:

1. Empties the workset tables AV_WORKSET and AV_WORKSET_MBR for the My Prospects workset.

2. Selects records from resource assignment tables based on the following conditions:
Chapter 29 Using Self-Service Outreach

Table

<table>
<thead>
<tr>
<th>Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AV_ASGN_STF_PRP</strong></td>
</tr>
<tr>
<td><strong>AV_PG_STAFF</strong></td>
</tr>
<tr>
<td><strong>AV_CNST_ACTN</strong></td>
</tr>
<tr>
<td><strong>AV_CNST_AC_ASGN</strong></td>
</tr>
</tbody>
</table>

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

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

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

**Note:** Oracle recommends that you schedule the My Prospects process to run nightly to keep the My Prospects worksets current for all users.

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

**Related Links**

"Assigning Constituent Types" (PeopleSoft Campus Solutions 9.0: Contributor Relations)  
"Maintaining an Organization's Financial Information" (PeopleSoft Campus Solutions 9.0: Contributor Relations)

**Assigning Resources to the My Prospects Workset**

Several resource assignment pages are available within PeopleSoft Contributor Relations that enable you to assign a prospect to an outreach officer. These additions immediately update their My Prospects worksets (or create new ones, if none already exist), regardless of whether the My Prospects process has been run.

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

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

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

**Related Links**
"Understanding Prospect Management" (PeopleSoft Campus Solutions 9.0: Contributor Relations)

**Managing an Action Plan**

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

- Review reminders.
- View assigned actions.
Pages Used to Manage an Action Plan

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Reminders</td>
<td>A_V_MYREMINDERS</td>
<td>Self Service, Outreach, My Prospects, My Reminders</td>
<td>View actions that need immediate or current attention.</td>
</tr>
</tbody>
</table>

Reviewing Reminders

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

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

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

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

Viewing Assigned Actions

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

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

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

This section discusses how to:

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

### Pages Used to Manage Prospect Strategies

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

Access the Prospect Strategy - Select a Prospect page (Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update a Strategy).

Image: Prospect Strategy - Select a Prospect page

This example illustrates the fields and controls on the Prospect Strategy - Select a Prospect page. You can find definitions for the fields and controls later on this page.

To add or update prospect strategies, outreach officers must first access the Prospect Strategy page, search their prospect worksets, and select prospect names. After a user selects a name, that user can then add new strategies or edit existing ones on that prospect record.

To search for a prospect, select an institution and any additional combination of search values.

When you click the Search button, the results appear at the bottom of the page in alphabetical order. At any point, you can clear search values.

Note: Search pages for strategies and actions in PeopleSoft Outreach are populated only with members of the My Prospects workset.

The following format restrictions apply to the fields on this page: The value in the Class Year field must be in CCYY format (century/year), the value in the City field must use initial capitals and include spaces between words, and the value in the Org Name field must be uppercase and exclude spaces between words. In addition, note that the values in the ID fields (Last Name, First Name, and Org Name) convert to uppercase when you click the Search button.

Person Criteria

The fields in this group box apply only to person records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Organization Criteria group box.

To search for a person, enter an employee ID, first name, last name, or class year.
Organization Criteria

The fields in this group box apply only to organization records. When you enter search criteria in this group box and click the Search button, the system also uses criteria entered in the Common Criteria group box, but ignores any criteria entered in the Person Criteria group box.

To search for an organization, enter values in the Org ID, Org Name, or Industry Code (SIC) fields.

Common Criteria

Use the fields in this group box to search for people, organizations, or both.

The system populates the Institution and Country fields by default. The default country value depends on your installation setup, but you can change the value here. The values in the State field depend on the country selected.

Constituent Type field values relate specifically to either people or organizations. The value that you select affects your search results. For example, if you search for organizations but choose a person constituent type of Alumni, the search displays no prospect records.

Note: Valid constituent types are shipped with your system and should not be altered.

Examples

Here are three examples of search results:

• If you enter a city and a constituent type, the search results display all prospects with the selected constituent type who live in that city.

• If you enter a person ID, but select the Organizations Only search option, the system ignores the values in the Person Criteria group box.

  The search results display no people, but instead display all organizations that meet the common criteria.

• If you enter a person's partial last name and a partial organization name and then select the Both search option, the system searches for person and organization prospects that meet the criteria in either group box.

  The search results display all people and all organizations that meet the partial name criteria.

Editing or Adding a Prospect Strategy

Access the Prospect Strategy - Edit Strategy page (click a prospect name in the Search Results area of the Prospect Strategy - Select a Prospect page).

To edit an existing strategy, click a link under the Strategy Name heading. If no strategies exist for the prospect and you want to add a new strategy, then click the Add a Strategy button. Both the link and the button access the Prospect Strategy - Strategy Detail page. If you are adding a new strategy, then you must enter the strategy detail information on the Prospect Strategy - Strategy Detail page. If you are editing an existing strategy, the system populates the Prospect Strategy - Strategy Detail page with the existing data.
To remove an entire strategy from a prospect's record, select the appropriate check box and click the Delete button. A warning message appears, asking you to click the OK button to confirm the deletion or click the Cancel button to return to the Prospect Strategy - Edit Strategy page. You can delete multiple strategies at the same time.

**Editing or Adding Prospect Strategy Details**

Access the Prospect Strategy - Strategy Detail page (click a link under the Strategy Name heading or click the Add a Strategy button on the Prospect Strategy - Edit Strategy page).

**Page Layout**

All of the Prospect Strategy pages display the same information at the top of the page: the step of the process; the prospect's name, email address, and highest-ranking constituent type; and the name of the assigned prospect manager. You can click the email address link to launch your email program and send a message to the prospect, then return to this page in the process. For a prospect who is a person, you can access the Constituent Type Summary page, which lists all assigned constituent types for the prospect.

Several buttons can appear in the upper-right corner of the page:

- ![View information for the prospect's spouse record in the system.](image)
- ![Assign or view communication records for the prospect.](image)
- ![Assign or view checklists for the prospect.](image)
- ![Add a comment or view a list of all comments about the prospect.](image)
- ![View Family Educational Rights and Privacy Act (FERPA) biographic information for the prospect.](image)
- ![View details about the service restrictions that are associated with negative service indicators for the prospect.](image)
- ![View details about the positive service indicators for the prospect.](image)

In addition, the navigation buttons on this page apply to all of the Prospect Strategy pages.

**Strategy Detail**

In this section, you enter or change a strategy name, select its status, and select whether to link the strategy to the prospect's spouse and manage the prospects as a couple.

**Note:** The Apply Strategy to Spouse option is available only if a spouse exists for the prospect in the system.

You can also enter or edit a detailed strategy description using the long free-text description field and mark the date and time of each descriptive entry.
Linking a Prospect Strategy to Initiatives

Access the Prospect Strategy - Link Strategy to Initiatives page (click the Next button on the Prospect Strategy - Strategy Detail page).

The instructions on the page lead you through this optional process of linking an initiative to the strategy. Adding a campaign initiative to a prospect's strategy results in the prospect being identified as a prospect for that campaign. You select an initiative type from the available options. In addition to these delivered types, the organization can define more types on the Setup Initiative Types page. After selecting the type, you enter an initiative of that type or selects one from the prompt.

Linking a Prospect Strategy to Actions

Access the Prospect Strategy - Linked Actions page (click the Next button on the Prospect Strategy - Linked Initiatives page).

Outreach officers can use the Prospect Strategy - Linked Actions page to manage specific actions to achieve the strategy. The page instructions lead you through the process of editing any existing actions; you can also click the Add an Action button to link new ones. Any actions previously added and linked to the strategy appear on this page. You can click a link under the Action heading to display the populated Prospect Action - Action Detail page; you can click the Add an Action button to display a blank Prospect Action - Action Detail page.

This page also displays any actions that have been added to a spouse's record that are linked to this strategy. You can click the Action link to display the Prospect Action - Action Detail page.

Related Links

- Editing or Adding Prospect Action Details

Viewing a Prospect Strategy Summary

Access the Prospect Strategy - Summary page (click the Next button on the Prospect Strategy - Linked Actions page).

You can print the page using your web browser's print functionality (File, Print, or Ctrl+P). You can edit any section or click the appropriate number in the upper-left portion of the page to return to the step that enables you to edit that part of the process.

To return directly to the summary from the edited step, you can click the last of the numbered circles in the upper-left corner of the page.

After viewing the summary information, you must save the transaction if you did not save the strategy in a prior step.

Managing Prospect Actions

This section discusses how to:

- Select a prospect name prior to managing prospect actions.
• Edit or add a prospect action.
• Edit or add prospect action details.
• (Optional) Edit or add ask information.
• (Optional) Edit or add prospect action descriptions.
• Assign resources to prospect actions.
• Link prospect actions to initiatives.
• View a prospect action summary.
• Select a prospect name prior to completing an action.
• Select an action to complete.
• Complete a prospect action.
• Select a prospect name prior to completing a contact report.
• Enter contact report details.
• View a contact report summary.
• Send a contact report.
• Send updated biographical information.

Pages Used to Manage Prospect Actions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prospect Action - Select a Prospect</td>
<td>AV_OUTR_SRCH</td>
<td>Self Service, Outreach, My Prospects, My Stewardship Plans, Add/Update an Action</td>
<td>Search for and select a prospect action record from the My Prospects workset.</td>
</tr>
<tr>
<td>Prospect Action - Edit Action</td>
<td>AV_OUTR_ACTN_LIST</td>
<td>Click a name in the Search Results area of the Prospect Action - Select a Prospect page.</td>
<td>Select a prospect action to edit.</td>
</tr>
<tr>
<td>Prospect Action - Action Detail</td>
<td>AV_OUTR_ACTN_DTL</td>
<td>Click a link under the Action Description heading or click the Add an Action button on the Prospect Action - Edit Action page.</td>
<td>Enter or update an action step for a prospect that will be carried out by a staff member or volunteer.</td>
</tr>
<tr>
<td>Prospect Action - Ask Information</td>
<td>AV_OUTR_ACTN_ASK</td>
<td>Click the Next button on the Prospect Action - Action Detail page.</td>
<td>Enter details about an action that includes a donation request (ask). If the action type on the Prospect Action - Action Detail page is not Ask, you should skip this page.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Prospect Action - Action</td>
<td>AV_OUTR_ACTN_DSCR</td>
<td>Click the Next button on the Prospect Action - Ask Information page.</td>
<td>Enter detailed information related to the action. If the action does not require further description, you can skip this page.</td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Action - Assigned</td>
<td>AV_OUTR_ACTN_ASGN</td>
<td>Click the Next button on the Prospect Action - Action Description page.</td>
<td>Assign other resources to the action. If appropriate, you can skip this page.</td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Action - Linked</td>
<td>AV_OUTR_ACTN_INIT</td>
<td>Click the Next button on the Prospect Action - Assigned Resources page.</td>
<td>Link campaign, event, membership, volunteer, or other initiatives to the action. If appropriate, you can skip this page.</td>
</tr>
<tr>
<td>Initiatives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Action - Summary</td>
<td>AV_OUTR_ACTN_SMRY</td>
<td>Click the Next button on the Prospect Action - Linked Initiatives page.</td>
<td>View and print a prospect action summary.</td>
</tr>
<tr>
<td>Prospect Action Results - Select a</td>
<td>AV_OUTR_SRCH</td>
<td>Self Service, Outreach, My Prospects, My Stewardship Plans, Complete an Action</td>
<td>Search for and select a prospect record from the My Prospects workset that has an action to complete.</td>
</tr>
<tr>
<td>Prospect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Results - Select a Prospect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Action - Results</td>
<td>AV_OUTR_RSLT_LIST</td>
<td>Click a name in the Search Results area of the Prospect Action Results - Select a Prospect page.</td>
<td>Select a specific action to complete.</td>
</tr>
<tr>
<td>Edit Action</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Action - Results</td>
<td>AV_OUTR_ACTN_RSLT</td>
<td>Click a link under the Action Description heading on the Prospect Action - Results - Edit Action page.</td>
<td>Enter the specific results of a completed action.</td>
</tr>
<tr>
<td>Results</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Contact Report - Select a</td>
<td>AV_OUTR_SRCH</td>
<td>Self Service, Outreach, My Prospects, My Stewardship Plans, Complete Contact Report</td>
<td>Search for and select a prospect record from the My Prospects workset to complete and send a contact report.</td>
</tr>
<tr>
<td>Prospect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Report - Select a Prospect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Contact Report - Detail</td>
<td>AV_OUTR_ACTN_CNCT</td>
<td>Click a name in the Search Results area of the Prospect Contact Report - Select a Prospect page.</td>
<td>Enter constituent contact report details.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect Contact Report - Summary</td>
<td>AV_OUTR_ACTN_CSMRY</td>
<td>Click the Printer Friendly Version link on the Prospect Contact Report - Detail page.</td>
<td>View a printable summary of all information on the contact report.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send Contact Report</td>
<td>AV_OUTR_CNCT_SEND</td>
<td>Click the Send Report button on the Prospect Contact Report - Detail page.</td>
<td>Send a completed contact report to a list of users.</td>
</tr>
</tbody>
</table>
Selecting a Prospect Name Prior to Managing Prospect Actions

Outreach officers can manage prospect actions by using the three links on the Outreach Home page. Their options are to add or update an action, complete an action, or complete a prospect contact report.

To add or update prospect actions, outreach officers must first access the Prospect Action page, search their prospect worksets, and select prospect names. When a user selects a name, that user can then add new actions or edit existing ones on that prospect record.

Related Links
Selecting a Prospect Name

Editing or Adding a Prospect Action

Access the Prospect Action - Edit Action page (click a name in the Search Results area of the Prospect Action - Select a Prospect page).

This page lists each action associated with the prospect, its status, and its planned completion date.

1. Select an action description, to edit an existing action.

2. Click the Add an Action button, if no existing actions are available, for the prospect and you want to add a new action.

   Note: Both the link and the button access the Prospect Action - Action Detail page.

3. Enter the action detail information, If you are adding a new action.

   The system populates the Prospect Action - Action Detail page with the existing data.

Editing or Adding Prospect Action Details

Access the Prospect Action - Action Detail page (click a link under the Action Description heading or click the Add an Action button on the Prospect Action - Edit Action page).

Users enter or change an action description and select its status from the available options. Next, users enter an expected completion date for the action as well as a date when the action expires if it is not completed. The action no longer appears in the current actions lists on the My Reminders page when the action is expired. It does appear on the My Action Plan page if the date range entered includes the action date of the expired action. The expected completion date appears in grids as the planned date. Users also have options to select an action type and method of contact. Available values for the Action Type and Method fields on this page are defined by the organization. To complete the action, users select...
a responsible person. When users enter the responsible person's ID, the responsible person's name appears to the right of the ID field. Finally, users may select the strategy that this action supports.

**Note:** The values for the Responsible Person Type field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

**Related Links**

Editing or Adding Prospect Strategy Details

**(Optional) Editing or Adding Ask Information**

Access the Prospect Action - Ask Information page (click the Next button on the Prospect Action - Action Detail page).

If the action type is *Ask*, outreach officers must enter specific ask information on this page. Users enter the monetary range (From and To amounts) that will be requested as a donation. The type of solicitor for the donation and the solicitor name are required if the action is an ask. Only resources defined with a role of Solicitor (*SOL*) appear in the Solicitor field.

If the action type is not *Ask*, the system skips this page in the component. Users can return to view the page, but the fields are unavailable for entry.

**Note:** The values for solicitor type are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

**(Optional) Editing or Adding Prospect Action Descriptions**

Access the Prospect Action page.

This page contains a 254-character free-form text field in which outreach officers can enter brief details of the action. Users can mark the date and time of each descriptive entry by clicking the Date/Time Stamp button.

**Assigning Resources to Prospect Actions**

Access the Prospect Action - Assign Others to Action page.

If users want to assign additional resources to the action, they can add them on the Prospect Action - Assigned Resources page. Assigned resources assist the outreach officer in completing the action either by providing information or by actual involvement in the action itself. Roles indicate the assigned resource's relation to the action; the institution defines these values.

To add a resource, users select the resource type, and then enter the role and the ID of the resource assigned.

**Note:** The values for the Resource Assigned field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.
Chapter 29 Using Self-Service Outreach

Linking Prospect Actions to Initiatives

Access the Prospect Action - Linked Initiatives to Action page.

If outreach officers want to link initiatives to an action, they can add them on the Prospect Action - Linked Initiatives page. Linking a campaign initiative to an action means that the prospect appears on the prospect list for that campaign. To begin, a user clicks the Add an Initiative button. Next, the user enters an initiative type and initiative code. The name of the initiative appears to the right of the code. The organization defines the initiative type code values on the Initiative Types page.

Viewing a Prospect Action Summary

Access the Prospect Action - Summary page (click the Next button on the Prospect Action - Linked Initiatives page).

When the outreach officer finishes entering or editing all of the desired action information, the Prospect Action - Summary page appears. Users can print the page using their web browser's print functionality (File, Print or Ctrl+P). If a user wants to edit a section, the user can return to the step that enables editing of that part of the process by clicking the Edit button.

If outreach officers click the Send Report button, the Send Contact Report page appears where they can enter action report information. When users complete a prospect contact report using the Send Contact Report page, the system creates an enhanced contact report.
The following example shows the information contained in the contact report:

**Image: Send contact report example**

An example of a contact report.

```
* * * Constituent Information * * *
ID:       AV0008
Name:     James Carroll
Constituent Type: Alumni
City, State: Cherry Hill, NJ
Gender: Unknown

* * * Action Information * * *
Number: 100
Brief Description: Test action
Description:
4/6/2005 09:17 AM - Leadership opportunity
Planned Date: 2005-04-06
Complete Date: 2005-04-06
Type: Invitation
Contact Type: Email message
Status: Complete
Result: Accepted

* * * Contact Report Information * * *
Author: Carroll, Bruce
Report Date: 2005-04-06
4/6/2005 09:24 AM - James was delighted with the invitation and suggested several classmates to join in the effort.
```

These reports provide detailed information and enable outreach officers to send copies of incomplete actions as well as completed contact reports to other resources. Your organization can use these reports as an effective communication tool.

To return directly to the summary from the edited step, users can click the last of the numbered circles in the upper-left corner of the page.

When finished viewing the summary information, if they have not already done so, users must save the transaction if they want to keep it.

**Selecting a Prospect Name Prior to Completing an Action**

To complete prospect actions, outreach officers must first access the Prospect Action - Results page, search their prospect worksets, and select prospect names. When a user selects a name, that user can then complete actions on a prospect record.

**Related Links**

Selecting a Prospect Name
Selecting an Action to Complete

Access the Prospect Action - Results - Edit Action page (click a name in the Search Results area of the Prospect Action Results - Select a Prospect page).

This page lists each action associated with the prospect, its status, and its planned date for completion. Outreach officers click a link under the Action Description heading to select the action that they want to complete; the system displays the Prospect Action - Results page.

Completing a Prospect Action

Access the Prospect Action - Results page (click a link under the Action Description heading on the Prospect Action - Results - Edit Action page).

In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

**Action Results**

Outreach officers select an action status. The status has a default value of *Complete*. Users also must select a result code. The organization can define other values as well.

Next, users complete the Complete Date field. The current date appears by default the first time that the page is accessed for an action, but the default value can be overwritten. If the ask resulted in a commitment, enter the expected commitment amount, or the monetary amount that you expect to receive from the donor because of this action. The Actual Commitment field displays the monetary amount that the organization received because of this action.

**Action Results - Pledge**

Users can enter the pledge number for a pledge that resulted from the action. Users click the Details link to view the Pledge Detail page.

**Action Gifts**

Users can enter the gift number for a gift that was received as a result of the action. Users click the Details link to view the Gift Detail page. To add another gift to the action results, users click the Add a gift button. Users click the Add another Action button to start the process for creating a new action for that prospect.

When saving the page, if the user entered a gift number, the date and gift amount appear to the right of the gift number. The process works similarly if a user enters a pledge number. The date and time that the action was last updated appear at the bottom of the page.

Users can click the Contact Report button to go directly to the Prospect Contact Report page.

**Related Links**

[Entering Contact Report Details](#)

Selecting a Prospect Name Prior to Completing a Contact Report

Users can complete a contact report in two ways:
• If they are at the end of the process for completing an action, they can click the Contact Report button on the Prospect Action - Results detail page.

The system displays the Prospect Contact Report - Detail page.

• If they are at the beginning of the process for completing a contact report, they must first access the Prospect Contact Report page, search their prospect worksets, and select prospect names.

When users select a name, they can complete a contact report for that prospect.

Related Links
Selecting a Prospect Name

Entering Contact Report Details

Access the Prospect Contact Report page (Self Service, Outreach, My Prospects, My Stewardship Plans, Complete Contact Report).

In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Contact Report Detail

Outreach officers first enter their author IDs (the author ID is the user ID by default) and the report dates (the report date is the current date by default). Users can view a printer-friendly version of the Prospect Contact Report summary page.

The Report field is a long free-form text area where outreach officers can enter any details of the prospect contact, such as what happened as a result of the action or notes about possible further contacts. Users click the Date/Time Stamp button to mark the date and time of each descriptive entry. If users learn new information about a new prospect, they can link other prospects to this contact report by using the Link Report to Other Prospects section.

Link Report to Other Prospects

To link the report to a prospect's spouse, click the Link to Spouse button. The spouse ID appears in the ID field. Users can then access the same contact report through either the prospect ID or the spouse ID.

Note: The Link to Spouse button appears only if a spouse exists for the prospect in the system.

To link the report to other prospects, users select a value in the ID Type field and enter an ID. The linked prospect's name appears to the right of the ID. ID type values are delivered by the system. To link to more than one prospect, users click the Link another Prospect button. Users can also click the Delete button to unlink any currently linked prospects from the action.

Users click the Save button to save the contact report. The date and time that the action was last updated appear above the Report field. Users click the Send Report button to access the Send Contact Report page. Users click the Send BioDemo Update button to access the Send BioDemo Update page.

Related Links
Sending a Contact Report
Sending Updated Biographical Information
Chapter 29 Using Self-Service Outreach

Viewing a Contact Report Summary

Access the Prospect Contact Report - Contact Report Summary page (click the Printer Friendly Version link on the Prospect Contact Report - Detail page).

Users can review all contact report information online or print the complete contact report page as well using their web browser's Print functionality (File, Print or Ctrl+P).

After printing or viewing, users can return to the Prospect Contact Report - Detail page.

Sending a Contact Report

Access the Send Contact Report page (click the Send Report button on the Prospect Contact Report - Detail page).

When outreach officers complete a contact report and are ready to distribute it, they can use this page to send it to anyone in the organization. They can define their distribution lists by selecting the ID type of the recipients and entering the distribution ID. A user can also select a Role ID type to send the report to all users with the selected security role. A user can also enter any other email address list members to include in the distribution, separating multiple email addresses with a semicolon. A user is required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security - User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and action description. The Email Text field contains the outreach officer's name and the entire contents of the contact report from the Prospect Contact Report Detail page. Users can edit any field and add any discussion text necessary.

When finished, a user clicks the Send button to trigger the workflow that sends the contact report to the defined distribution list. That user receives a confirmation message that the email was sent, then clicks OK or Cancel to return to the Send Contact Report page. If a user clicks Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report Detail page.

Sending Updated Biographical Information

Access the Send BioDemo Update page (click the Send BioDemo Update button on the Prospect Contact Report - Detail page).

During the course of managing a prospect, outreach officers occasionally learn new biodemo information. This page enables users to distribute this new information to anyone in the organization. Users can define their distribution lists by selecting the ID types of the recipients and entering their distribution IDs. A user can also select a Role ID type to send the report to all users with the selected security role. They can also enter any other email address list members that they want to include in the distribution, separating multiple email addresses with semicolons. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined on the Maintain Security - User Profiles page.

The system populates the Email portion of the page with a default subject description that includes the prospect name and ID. The Email Text field begins with the outreach officer's name; users can then enter any updated information that is associated with the prospect.
When finished, users click Send to trigger the workflow that sends the contact report to the distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report - Detail page.

Analyzing Prospect Information

PeopleSoft Contributor Relations provides a number of pages that outreach officers can use to analyze prospect information. PeopleSoft Outreach offers a menu structure that gathers and delivers an assortment of pages that facilitate an outreach officer’s responsibilities. The links within these pages lead to either a run control page for a report or an inquiry page of summarized prospect information. These pages are not limited to the My Prospects workset and can be accessed for any constituent in the system.

This menu contains submenu links to personal information, organizational information, prospect lists and worksets, stewardship details, and PeopleSoft Contributor Relations reports. The following table summarizes these menu paths and lists all prospect analysis information pages that PeopleSoft Outreach delivers:

<table>
<thead>
<tr>
<th>Menu Navigation</th>
<th>Prospect Information Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service, Outreach, View Person Information, Constituent Information</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Involvement Summary</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Membership History</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Audience History</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Event History</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Volunteer History</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Relationship Summary</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Communication Summary</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Comment Summary</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Checklist Summary</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Self Service, Outreach, View Person Information, Prospect Information</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Clearance Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Personal Assets</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Ratings Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Philanthropic Interests</td>
<td>Strategy Summary</td>
</tr>
</tbody>
</table>
## Menu Navigation

<table>
<thead>
<tr>
<th>Menu Navigation</th>
<th>Prospect Information Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Appreciation Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Planned Giving Profile</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Action Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Contact Report Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Prospect Assignments</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Self Service, Outreach, View Person Information, Giving Information</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Commitment Summary</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Commitment Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Transaction Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Giving Club Progress</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Open Pledge Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Self Service, Outreach, View Organization Information, Constituent Information - Org</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Relationship Summary</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Involvement Summary</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Membership History</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Employee List</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Audience History</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Communication Summary</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Comment Summary</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Checklist Summary</td>
<td>Organization Profile</td>
</tr>
<tr>
<td>Self Service, Outreach, View Organization Information, Prospect Information - Org</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Action Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Contact Report Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Clearance Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Ratings Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td><strong>Menu Navigation</strong></td>
<td><strong>Prospect Information Page</strong></td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Philanthropic Interests</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Donor Appreciation Summary</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Prospect Assignments</td>
<td>Strategy Summary</td>
</tr>
<tr>
<td>Self Service, Outreach, View Organization Information, Giving Information - Org</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Commitment Summary</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Commitment Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Transaction Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Open Pledge Register</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Matching Gifts</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Giving Club Progress</td>
<td>Giving Profile</td>
</tr>
<tr>
<td>Self Service, Outreach, View Lists</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Campaign Prospects</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Top Donors</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Giving Club Membership</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Involvement Roster</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Profile Compare</td>
<td>Person Profile</td>
</tr>
<tr>
<td>Self Service, Outreach, View Reference Information</td>
<td>Campaigns</td>
</tr>
<tr>
<td>Giving Clubs</td>
<td>Campaigns</td>
</tr>
<tr>
<td>Designations</td>
<td>Campaigns</td>
</tr>
<tr>
<td>Self Service, Outreach, CR Reports</td>
<td>Bio-Bit Report - Person</td>
</tr>
<tr>
<td>Bio-Bit Report - Organization</td>
<td>Bio-Bit Report - Person</td>
</tr>
<tr>
<td>Bio-Bit Report - Workset</td>
<td>Bio-Bit Report - Person</td>
</tr>
<tr>
<td>Designation Donors</td>
<td>Bio-Bit Report - Person</td>
</tr>
<tr>
<td>Campaign Progress</td>
<td>Bio-Bit Report - Person</td>
</tr>
<tr>
<td>Role Assignments</td>
<td>Bio-Bit Report - Person</td>
</tr>
</tbody>
</table>
Chapter 30

Using Community Directory Search

Understanding Self-Service Community Directory Search

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

The Community Directory Search self-service functionality enables you to provide searchable directories of members of your campus community online over the internet. Instead of exposing an entire list of people at your institution and having users load and search through it, you can make student, employee, or alumni directories available so users can search from smaller online lists and quickly locate individuals at your institution.

To set up PeopleSoft Community Directory Search, run the Community Directory Load process to generate a student, employee, or alumni directory. Specify the appropriate mass change definition for the directory to generate, and specify the type of data to include in that directory.

If a student places FERPA privacy restriction on a specific type of data for him or herself, the system will not expose that data in the online directory. Or, if the individual placed the restriction but chose to release it for inclusion in a specific publication, for example, the Student Directory, then even though the data can not be released elsewhere, the system displays it in the specified directory as indicated.

Generating Community Directories

This section discusses how to generate online directories.

Page Used to Generate Community Directories

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
Generating Online Directories


Image: Community Directory Load page

This example illustrates the fields and controls on the Community Directory Load page. You can find definitions for the fields and controls later on this page.

Community Directory Load

Run Control ID: 1

Community Directories

*Mass Change Definition: CampDir_Student

Process FERPA

Edit Mass Change Definition

Data Type

Name Type: Preferred
Address Type: Campus
Phone Type: Campus
Email Type: Campus

Community Directories

Mass Change Definition

Specify the mass change definition for the directory to generate. The following mass changes are delivered with your system:

CampDir_Alumni: Generates the Alumni Directory.
CampDir_Staff: Generates the Employee Directory
CampDir_Student: Generates the Student Directory

Process FERPA

Select to apply the FERPA restrictions and release to publications options selected on the FERPA page, FERPA Quick Entry page, or the self-service Privacy Settings page in PeopleSoft Campus Self Service.

Edit Mass Change Definition

Click to access the Mass Change Definition search page where you can select the mass change definition to edit or to regenerate.

Data Type

Select one or any combination of data types to include in the directory.

Name Type

Select the type of name to include for individuals in this directory.
Address Type  Select the type of address to include for individuals in this directory.

Phone Type  Select the type of phone data to include for individuals in this directory.

Email Type  Select the type of email address to include for individuals in this directory.

To keep your community directories up to date, run the process at least once a day. Always regenerate the mass changes prior to running the process.

---

Searching Community Directories

This section discusses how to:

- Specify the directory to search.
- Search the community directory.

Pages Used to Search the Directories

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Directory Search</td>
<td>SRCH_CD_TYPE</td>
<td>Self Service, Community Directory Search</td>
<td>Specify the community directory and criteria to search.</td>
</tr>
<tr>
<td>Community Directory for Students</td>
<td>SRCH_STDNT_CRIT</td>
<td>On the Community Directory page, select Student Directory and enter criteria for which to search.</td>
<td>View the search results obtained from the Student Directory and enter fields to perform a new search.</td>
</tr>
<tr>
<td>Community Directory for Employees</td>
<td>SRCH_STAFF_CRIT</td>
<td>On the Community Directory page, select Employee Directory and enter criteria for which to search.</td>
<td>View the search results obtained from the Employee Directory and enter fields to perform a new search.</td>
</tr>
<tr>
<td>Community Directory for Alumni</td>
<td>SRCH_ALUMN_CRIT</td>
<td>On the Community Directory page, select Alumni Directory and enter criteria for which to search.</td>
<td>View the search results obtained from the Alumni Directory and enter fields to perform a new search.</td>
</tr>
<tr>
<td>Student Profile</td>
<td>STDNT_PROF_SEC</td>
<td>Click the student's name on the Community Directory for Students page.</td>
<td>View data in the directory profile for that person.</td>
</tr>
<tr>
<td>Employee Profile</td>
<td>STAFF_PROF_SEC</td>
<td>Click the employee's name on the Community Directory for Employees page.</td>
<td>View data in the directory profile for that person.</td>
</tr>
<tr>
<td>Alumni Profile</td>
<td>ALUMN_PROF_SEC</td>
<td>Click the alumnus name on the Community Directory for Alumni page.</td>
<td>View data in the directory profile for that person.</td>
</tr>
</tbody>
</table>
Specifying the Directory to Search

Access the Community Directory Search page (Self Service, Community Directory Search).

Image: Community Directory Search page

This example illustrates the fields and controls on the Community Directory Search page. You can find definitions for the fields and controls later on this page.

### Community Directory Search

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Directory Type</strong></td>
<td>Select the directory type (Alumni Directory, Staff Directory, or Student Directory) to search.</td>
</tr>
<tr>
<td><strong>Search By</strong></td>
<td>Specify the criteria (First Name, Full Name (Last,First), or Last Name) by which to search.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Click to access the specified directory.</td>
</tr>
</tbody>
</table>

**Directory Type**

Select the directory type (Alumni Directory, Staff Directory, or Student Directory) to search.

**Search By**

Specify the criteria (First Name, Full Name (Last,First), or Last Name) by which to search.

Specify one or more characters to use. For example, if you select First Name and enter only S, the system searches through the specified directory for all first names that begin with "S."

**Search**

Click to access the specified directory.

Searching a Community Directory

Access the Community Directory for Students (on the Community Directory page, select Student Directory and enter criteria for which to search, Community Directory for Employees (on the Community Directory page, select Employee Directory and enter criteria for which to search), or Community
Directory for Alumni page (on the Community Directory page, select *Alumni Directory* and enter criteria for which to search).

**Image: Community Directory for Students page**

Community Directories (students, employees, alumni) students

This example illustrates the fields and controls on the Community Directory for Students page. You can find definitions for the fields and controls later on this page.

### Community Directory for Students

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with *Sm*, you can enter just *Sm* in the last name field. Click the Search button to retrieve the results of your search.

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Last Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>K</td>
</tr>
</tbody>
</table>

**SEARCH**

Your search found 178 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

<table>
<thead>
<tr>
<th>Search Results</th>
<th>Phone</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>KATELYNN,K T</td>
<td>503 3902393</td>
<td>n/a</td>
</tr>
<tr>
<td>KAVANAGH,NIALI</td>
<td>773/761-8120</td>
<td>n/a</td>
</tr>
<tr>
<td>KAVANAGH,NIALL T</td>
<td>415 6649258</td>
<td>n/a</td>
</tr>
<tr>
<td>KEEG,PAUL</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>KIELNAN,PAT</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>KOSTECKI,BOGUSLAW</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>KRASE,JESSICA</td>
<td>415/392-3315</td>
<td>n/a</td>
</tr>
<tr>
<td>KUBIL,RANGELL</td>
<td>209/544-3713</td>
<td>n/a</td>
</tr>
<tr>
<td>KUDNIAI,WEIXEL</td>
<td>209/544-3713</td>
<td>n/a</td>
</tr>
<tr>
<td>KUOLOPA,LOOMIS</td>
<td>209/544-3713</td>
<td>n/a</td>
</tr>
<tr>
<td>KUNDE,HELENA</td>
<td>209/544-3713</td>
<td>n/a</td>
</tr>
<tr>
<td>KUVERA,BRVVINI</td>
<td>209/544-3713</td>
<td>n/a</td>
</tr>
<tr>
<td>Kaandra,Yuan Yuan</td>
<td>412/276-0533</td>
<td>n/a</td>
</tr>
<tr>
<td>Kabran,Michael E</td>
<td>301/572-7696</td>
<td>n/a</td>
</tr>
<tr>
<td>Kegle,Leslie B</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Kahle,Lisa</td>
<td></td>
<td>n/a</td>
</tr>
</tbody>
</table>
This example illustrates the fields and controls on the Community Directory for Employees page. You can find definitions for the fields and controls later on this page.

**Community Directory for Employees**

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with ‘Sm’, you can enter just ‘Sm’ in the last name field. Click the Search button to retrieve the results of your search.

- **First Name:**
- **Last Name:**
- **Department:**

[SEARCH]

Your search found 12 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

<table>
<thead>
<tr>
<th>Names</th>
<th>Department</th>
<th>Phone</th>
<th>Ext</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrews, Joshua</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Augusta, Jessica</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Hand, Sofia</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Hazzard, Shannon</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Lewis, Marcia</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Lynch, Janice</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Marcus, John</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>McKenzie, Andrea</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Sevis, Adam</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Sevis, Clark</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Sevis, Greg</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>Sevis, Marshall</td>
<td>Admissions Office</td>
<td></td>
<td></td>
<td>n/a</td>
</tr>
</tbody>
</table>
This example illustrates the fields and controls on the Community Directory for Alumni page. You can find definitions for the fields and controls later on this page.

**Community Directory for Alumni**

Enter your search criteria in the fields below. You may enter full or partial criteria. For example, if you know the last name of the person you are searching for begins with Sm, you can enter just Sm in the last name field. Click the Search button to retrieve the results of your search.

- **First Name:**
- **Last Name:**
- **Class Year:** 2001 (example: 1998)

Your search found 6 directory listings. Click the name to view additional contact information. Click the email address (if one is shown) to send email to the person.

<table>
<thead>
<tr>
<th>Search Results</th>
<th>Class Year</th>
<th>Phone</th>
<th>Ext</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dorian Newton</td>
<td>2001</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jeremy Saxton</td>
<td>2001</td>
<td>514/345-7686</td>
<td>n/a</td>
<td><a href="mailto:jie@college.edu">jie@college.edu</a></td>
</tr>
<tr>
<td>Jonathan Silver</td>
<td>2001</td>
<td>512/444-3465</td>
<td>n/a</td>
<td><a href="mailto:silver@hotmail.com">silver@hotmail.com</a></td>
</tr>
<tr>
<td>Robin Isenberg</td>
<td>2001</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shawn Gallagher</td>
<td>2001</td>
<td>818/963-1478</td>
<td>n/a</td>
<td>s@<a href="mailto:allechen@apl.com">allechen@apl.com</a></td>
</tr>
<tr>
<td>Tina Graham</td>
<td>2001</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Search Results**

- **Names**: Click the individual's name to access the directory profile page for that person where you can view or edit profile data.

- **Email Address**: Click the individual's email address to send an email to that address.
Chapter 31

Using Campus Mobile

Accessing Campus Mobile Functionality

This section lists the pages within the Campus Mobile smartphone application.

*Note:* The pages listed here can be accessed in the Campus Mobile application archive file via Jdeveloper. These are not objects that can be accessed through PeopleTools Application Designer.

*Note:* Within the Campus Mobile system, the full object names of the pages listed in the following table (except for the Login page) exist as `oracle.cs.cm.view.[DEFINITION NAME].amx`.

Pages Used to Access Campus Mobile Functionality

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>login.html</td>
<td>Launch the Campus Mobile app.</td>
<td>Students navigate to various Campus Mobile features.</td>
</tr>
<tr>
<td>Springboard</td>
<td>springboard.springboard</td>
<td>Log into the Campus Mobile app.</td>
<td>Students begin their Campus Mobile experience.</td>
</tr>
<tr>
<td>Class Schedule</td>
<td>schedule.schedule</td>
<td>Tap Schedule on the springboard.</td>
<td>Students view their class schedule for present and future terms.</td>
</tr>
<tr>
<td>Class Details</td>
<td>search.section-details</td>
<td>Tap a class in the Landing Page, Schedule, Cart, or Search results.</td>
<td>Students view the details of a selected class.</td>
</tr>
<tr>
<td>Map</td>
<td>map.show-location</td>
<td>Tap the Room field on the Class Details page.</td>
<td>If the room has location details entered into Campus Solutions, students can view the location of the room on a map.</td>
</tr>
<tr>
<td>Contact Info</td>
<td>search.instructor-info</td>
<td>Tap the Primary Instructor field on the Class Details page.</td>
<td>If the instructor has contact information entered into Campus Solutions, students can view the instructor’s contact information.</td>
</tr>
<tr>
<td>Drop Class</td>
<td>schedule.drop-class</td>
<td>Tap the Drop Class button on the Class Details page.</td>
<td>Students drop a class in which they are enrolled, depending on business rules within Campus Solutions.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------</td>
<td>------------------------------------------------------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td>Grades</td>
<td>grades.grades</td>
<td>• Tap Grades on the springboard.</td>
<td>Students view their grades.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tap a grade event on the Notifications tab of the Landing page.</td>
<td></td>
</tr>
<tr>
<td>Class Search</td>
<td>search.class-search</td>
<td>Tap Classes on the springboard.</td>
<td>Students search the class schedule for terms in which they are able to enroll.</td>
</tr>
<tr>
<td>Class Search Filter</td>
<td>search.display-filter</td>
<td>Tap the Filter button on the Class Search page.</td>
<td>Students filter the returned class search results.</td>
</tr>
<tr>
<td>Enroll</td>
<td>enrollOptions.enrollmentSecs</td>
<td>Tap the Enroll button on the Class Details page.</td>
<td>Students enroll directly to their class schedule, depending on business rules within Campus Solutions.</td>
</tr>
<tr>
<td>Enrollment Cart</td>
<td>cart.show-cart</td>
<td>Tap Cart on the springboard.</td>
<td>Students view their enrollment cart for present and future terms.</td>
</tr>
<tr>
<td>To Do</td>
<td>todoList.todoList</td>
<td>Tap To Do on the springboard.</td>
<td>Students view their “to do” list.</td>
</tr>
<tr>
<td>To Do Details</td>
<td>todoList.todoItemDetails</td>
<td>• Tap an item on the To Do page.</td>
<td>Students view the details of an item on their “to do” list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tap a To Do event on the Notifications tab of the Landing page.</td>
<td></td>
</tr>
<tr>
<td>Finances</td>
<td>finances.display-financial-info</td>
<td>Tap Finances on the springboard.</td>
<td>Students view their finances.</td>
</tr>
<tr>
<td>Profile</td>
<td>profile.display-settings</td>
<td>Tap Profile on the springboard.</td>
<td>Students view and set certain notification and user preferences.</td>
</tr>
<tr>
<td>Holds</td>
<td>holds.holdsList</td>
<td>• Tap Holds on the springboard.</td>
<td>Students view their holds.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tap a Hold event on the Notifications tab of the Landing page.</td>
<td></td>
</tr>
<tr>
<td>Applications</td>
<td>application.display-application-status</td>
<td>Tap Applications on the springboard.</td>
<td>Students view their admissions applications.</td>
</tr>
<tr>
<td>Contributions</td>
<td>involvement.Contributions</td>
<td>Tap Contributions on the springboard.</td>
<td>Students make a gift to their institution.</td>
</tr>
</tbody>
</table>
Chapter 31 Using Campus Mobile

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landing Page</td>
<td>landingPage.landingPage</td>
<td>Open the Campus Mobile app or tap What's Happening Today on the springboard.</td>
<td>Students view their classes for the day, to do items and charges due that day or overdue, as well as holds.</td>
</tr>
<tr>
<td>Notifications</td>
<td>landingPage.landingPage</td>
<td>Tap the Notifications tab on Landing Page.</td>
<td>Students view a list of configured events that have occurred on their student record or account within the past 7 days.</td>
</tr>
<tr>
<td>About</td>
<td>springboard.about</td>
<td>Tap About on the springboard.</td>
<td>View information about the app.</td>
</tr>
</tbody>
</table>

Logging In

The delivered Campus Mobile login screen appears to the student when the Campus Mobile application opens.

**Image: Example of Login screen**

This example illustrates the fields and controls on the Example of Login screen. You can find definitions for the fields and controls later on this page.

![Login screen image]
To access the Campus Mobile app, you must first authenticate. The authentication utilizes the standard Campus Solutions PeopleTools sign-on. Therefore, the authentication (login and password) for a student in Campus Mobile is the same as their authentication (login and password) used throughout Campus Solutions Self Service.

The Remember me option on the login page is provided as a convenience so that the Username attribute does not have to be reentered upon each login.

The authentication passes from Campus Solutions to Campus Mobile via a REST web service. For more information on the authentication web service, see the Campus Mobile Implementation Guide.

### Using Springboard

The springboard is a menu delivered with a default set of icons that represent each function provided by Campus Mobile.

**Image: Example of springboard screen**

This is an example of the Springboard screen.

Your institution can choose to customize the springboard to include its own icons and colors. The springboard menu also includes the Logout functionality, which logs out of the application and shuts it down.
About

This page presents information about the app. Any institution implementing Campus Mobile is expected to update the information page with their copyright information, release number, and logo. The number at the bottom left of the page is an Oracle internal version number to be used for troubleshooting.

Image: About page

This example illustrates the fields and controls on the About page.

The *Campus Mobile Implementation Guide* provides information on customizing and branding the application springboard and the About page.
Holds

The Holds feature provides a list of the student's holds (negative service indicators). The student can tap on one of the holds to view more details about the hold, such as start and end dates, reason, and contact details.

**Image: Holds page**

This example illustrates the fields and controls on the Holds page.

Landing Page

This is the first page seen when opening the app. It is a dynamic, timeboxed view of the student's day and includes an up-to-the-minute view of the student's daily class schedule, charges due today, to do items due today, holds, and any overdue charges or to do items. On the landing page is a Notifications tab. In
Notifications, the student sees a feed of events that have happened on their academic record and have subsequently triggered Notifications (such as a posted final grade, or an added checklist item).

**Image: Landing page**

This example illustrates the fields and controls on the Landing page.

---

**Using Class Schedule**

This section discusses how to:

- View class attributes.
- Map to building locations of classes.
- View instructor contact information.
- Drop classes.
Class schedule presents a student’s schedule in three ways: a detailed list, a map, and a calendar view.

**Image: Class Schedule detailed view**

This example illustrates the fields and controls on the detailed view of the Class Schedule page. You can find definitions for the fields and controls later on this page.

If the student is not enrolled in any classes for the current term, the class schedule view displays by default the next term in which the student is term activated and has classes. The student can browse through current and future terms by either tapping the term selector button or the left/right arrows. If the student is enrolled in multiple institutions or careers with multiple schedules, they can pick from the multiple institutions and careers by tapping the term selector button. Campus Mobile stores the student's view choices so that when they return to the Class Schedule feature it will present the most recent view (such as the current term in calendar view.) All of the information provided in the schedule is delivered to the Campus Mobile app using Enrollment Web Services.

The class schedule detailed view lists the courses by subject + catalog number + class description and includes the following information for all enrolled, waitlisted, and dropped class sections:

- Component type (such as lecture or lab)
- Section number
- Class number
- Meeting pattern
- Instructor
• Room location

The class schedule map view shows all classes simultaneously on the map. Each class location is represented by a pin. When the user taps the pin, the app presents the classes by subject + catalog number and component type and shows the meeting pattern, meeting pattern date range, and room location. The user can tap the popup view to open the Class Details page.

The class schedule calendar view shows all classes in both a portrait and landscape calendar style view. The class schedule calendar view lists the classes by subject + catalog number and component type along with the location of the class. The user can tap the class to open the Class Details page. In landscape mode, the classes appear in a calendar grid. Building locations that have more than one class section (or meeting pattern) associated with them are marked with a pin that has multiple pinheads.

**Image: Class Schedule calendar view**

This example illustrates the fields and controls on the calendar view of the Class Schedule page.

See the *Campus Mobile Implementation Guide* for more information on customization and branding.

**Viewing Class Attributes**

When the student selects a class section in their schedule, he or she is presented with information about the class section including:

• Description

• Program
• Campus
• Location
• Units
• Grading Basis (such as Graded or Pass/No Pass)
• Status
• Textbook information.

**Image: Class Details page – expanded**

This is an example of the Class Details page – expanded. You can find details later on this page.

<table>
<thead>
<tr>
<th>Program</th>
<th>Liberal Arts Undergraduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>Main Hacienda Campus</td>
</tr>
<tr>
<td>Location</td>
<td>Hacienda</td>
</tr>
<tr>
<td>Section Number</td>
<td>1270</td>
</tr>
<tr>
<td>Units</td>
<td>3.00</td>
</tr>
<tr>
<td>Grading Basis</td>
<td>Graded</td>
</tr>
<tr>
<td>Status</td>
<td>Enrolled</td>
</tr>
<tr>
<td>Textbook</td>
<td>Textbooks to be determined</td>
</tr>
</tbody>
</table>
Image: Class Details page – collapsed

This is an example of the Class Details page – collapsed. You can find details later on this page.

Collapse or expand the class details by tapping the arrow in the description box. Below the class details, the page displays the meeting pattern with the dates that it is active. If there are multiple meeting patterns associated with the class, they all appear in this screen, ordered by date. From this page, a student can tap the Room field to view a map of the building location if that data is available.

In addition, a student can tap the Instructor field on this page to see the instructor's email, phone, and building office location if your institution has mapped these fields, and photo if your institution has chosen to display it.

See Setting Up Campus Mobile Within Campus Solutions
Mapping to Building Locations of Classes

If the campus has provided latitude and longitude for their buildings on the Building Table component within Campus Solutions, the Room field in the class section details actively links to a map of that building location so the student can navigate to the class location.

**Image: Map page**

This example illustrates the fields and controls on the Map page. You can find details later on this page.

The latitude and longitude fields are delivered to the Campus Mobile app through Enrollment Web Services.

Campus Mobile delivers the map with the Oracle maps API enabled. The Oracle maps API enables Campus Mobile to show the building location and the location of the device (taking advantage of the GPS available in the phone). Your institution also has the choice to enable the Google Maps API; the *Campus Mobile Implementation Guide* contains further details.

**Related Links**

Student Records

**Viewing Instructor Contact Information**

If the campus has mapped instructor contact information in the Campus Mobile setup screen (Set Up SACR, Product Related, Campus Mobile, Instructor Contact Setup) within Campus Solutions, the
Instructor field in the class section details actively links to the Info page that displays the instructor's email, phone, address, and photo (where applicable). From this instructor contact page the student can tap the email address to send an email with their phone’s mail client or tap the phone number to start a phone call.

**Note:** If the instructor is also a student, and they have elected FERPA restrictions, their contact information will not appear.

**Image: Info page**

This example illustrates the fields and controls on the Info page.
Dropping Classes

On the Class Section Details page, a student has the ability to drop the class. When tapped, the Drop Class button displays a confirmation screen prior to completing the drop.

**Image: Drop Class page**

This example illustrates the fields and controls on the Drop Class page. You can find definitions for the fields and controls later on this page.

Drop Class follows the same rules as those followed by Campus Self Service (as delivered by Enrollment Web Services). Whether the drop is successful or fails, the message returned by the enrollment engine appears at the top of the page in Campus Mobile.
Viewing Grades and GPA

The Grades function enables a student to view official final grades for any term for which grades have been assigned to their classes.

Image: Grades page

This example illustrates the fields and controls on the Grades page. You can find definitions for the fields and controls later on this page.

Current Term GPA and Cumulative GPA also appear for each term available to the student. Students can use arrows on screen to navigate between terms. Campus Mobile stores the student's view choices so that when they return to the Grades feature it will present the most recent view. All grade and GPA data is delivered to the Campus Mobile app through Enrollment Web Services.

Searching for Classes in Campus Mobile

This section discusses how to:

- Filter the class search.
- Enroll in a class.
- Add a class to cart.
The Class Search function provides two methods for finding a class: a course title keyword search and a subject browse.

**Image: Class Search page**

This example illustrates the fields and controls on the Class Search page.

Using the term selector, a student can pick from any available institution, career, or term that is set to display in Class Search (the *Display in Class Search* attribute is set in the Term Values table in Campus Solutions). When a student finds a class section that they are interested in, they can save the class to their enrollment cart or add the class to their schedule. Campus Mobile stores the student's view choices so that when they return to the Class Search feature it will present the most recent view. All data for Class Search functionality is delivered through Enrollment Web Services.

**Filtering the Class Search**

The Class Filter page allows a student to filter their search results based on:

- Time of day
- Day of week
- Campus
- Mode of Delivery
• Open Sections Only

**Image: Class Search Filter page**

This example illustrates the Class Search Filter page.

When the filter is applied, subsequent searches will use the filter settings until it is reset or the application is shut down.

The *Campus Mobile Implementation Guide* contains details on class search filter settings/mappings.

See *Campus Mobile Implementation Guide*, posted to My Oracle Support.
Enrolling in a Class

Enroll allows students to enroll in a class section after conducting a class search, provided the student has met the requirements for enrollment.

**Image: Enroll page**

This example illustrates the Enroll page.

On completion of an enroll transaction, Campus Mobile presents the student with the appropriate success or error message at the top of the screen. The app presents delivered Campus Solutions enrollment options (such as permission number, related components, and variable units) to the student as required.

Adding a Class to Cart

Add to Cart allows students to add a class section to their enrollment cart after conducting a class search. The add to cart function presents all enrollment options to the student as required. On completion of an Add to Cart transaction, Campus Mobile presents the student with the appropriate success or error message at the top of the screen.
Viewing and Managing the Enrollment Cart

The Enrollment Cart function allows students to view their cart for any terms for which they have an active enrollment cart, remove classes from their cart, and add all classes from their cart. All data required for the enrollment cart is provided through Enrollment Web Services.

The buttons across the top allow the student to view the class sections in their cart based on the status of the class (Open, Wait List, or Closed). This is a quick way for a student to view the current status of the class (which could change frequently) in anticipation of enrollment.

**Image: Enrollment Cart page**

This example illustrates the Enrollment Cart page.

![Enrollment Cart page](image)

**Removing a Class From Enrollment Cart**

To remove a class from the cart, the student swipes across the class from left to right in order to make the Delete button appear. Students then tap the Delete button to remove the class from their cart.

**Editing Classes in Enrollment Cart**

Edit Class allows a student to modify their enrollment cart entries. The enrollment options the student previously selected appear and the student can either select new options or keep their prior selections and resave the class to their cart.
Viewing All Classes on a Map

Tapping the Action button at the top right of the Enrollment Cart brings up an action menu that includes the option to View on Map. View on Map presents all class sections in the student's schedule on the campus map at the same time. All meeting patterns are represented simultaneously. Building locations that have more than one class section (or meeting pattern) associated with them are marked with a pin that has multiple pinheads.

When you tap a pin, a popup window displays the class section information for that building. The student can tap on the popup to open the Class Details page for the indicated class section.

Viewing To Do Items

The To Do function allows students to see their To Do list (Checklist items). The To Do items are listed in chronological order by due date and can be filtered to show All, Overdue, Today, Soon, or Later. Each To Do item includes the status, due date, description, and administrative function. When a student taps a To
Do item, they can view more details on the item including: comments, institution, contact, and contact’s email.

**Image: To Do page**

This example illustrates the To Do page.

![To Do page](image-url)
Image: To Do page details

This example illustrates the To Do page details.

### Viewing Finances

The Finances function allows students to view a summary of their Student Financials account and, where applicable, Financial Aid information including:

- Account Balance – the total amount a student owes.
- Next Payment Due – the amount a student owes on the next date they have a payment due.
- Last Payment Received – the last payment received and applied to a student’s account.
• If a student has pending Financial Aid, that pending aid is shown along with a link to view Financial Aid Awards.

**Image: Finances page**

This example illustrates the Finances page.

![Finances page screenshot]

**Viewing Financial Aid Awards**

When a student taps Financial Aid Awards, they are presented with a view of their financial aid organized by awards under an aid year. (Note that the display is by aid year or by award period depending on the Self Service setting for display of Financial Aid.) If the student has more than one aid year on their account, they can tap the Aid Year selector button at the top of the screen to select a different aid year.
For each award the student can see the amount offered and amount accepted, and where applicable amount disbursed. Tapping on an award summary opens a breakdown of the award by term and from there a view of disbursements for an award in a given term.

**Image: Financial Aid page**

This example illustrates the Financial Aid page. You can find definitions for the fields and controls later on this page.

---

**Managing a Student Profile**

This section provides overviews of the Profile page and notifications.
Understanding Student Profile

The following is an example of the Profile page.

**Image: Profile page**

This example illustrates the Profile page.

In the profile, students can choose to enable SMS and email notifications and pick the cell number and email address where they want to receive notifications. The profile function synchronizes with data stored in Notification Preferences on the User Preferences page so that the values can be updated from either Self Service or Campus Mobile. In the profile, students can also select a default institution, financial aid year, and career. These defaults are synchronized with the user preferences in Campus Solutions Self Service. Campus Mobile uses the defaults to determine which Institution and Career load first when more than one exists for the student. The information needed for the Profile is delivered using the User Preferences web service.

Viewing Applications

In Applications, students can view their admissions applications for future terms. The applications are sorted by Institution and listed with details including program, career, term, and status. When the student
taps on a particular application they see more details including any remaining checklist items associated with the application.

**Image: Applications page**

This example illustrates the fields and controls on the Applications page.

![Applications page image]

### Making Contributions

In Contributions, the user can make a gift to their institution using a credit card. The Make a Gift function allows the student to choose to which fund they would like to donate and any associated campaign or
appeal. The credit card payment uses your institution’s third-party hosted payment vendor. No PCI data is stored in the Campus Mobile app.

**Image: Make a Gift page**

This example illustrates the fields and controls on the Make a Gift page.

![Make a Gift page](image)

**Understanding Notifications**

Notifications, which enhance the Campus Mobile application experience, are delivered in parallel with the Campus Mobile product. Notifications are triggered by a particular event in relation to a student's record in Campus Solutions and can be delivered to the student using SMS, email, or directly to the student's smartphone. While SMS and email notifications can be delivered to a student's smartphone without Campus Mobile being installed, this experience is enhanced in the following ways when the student uses Campus Mobile:

- Students can manage how they receive SMS and email notifications by using the Profile function of Campus Mobile.
- Students can receive and manage push notifications using their smartphone operating system. This enables functionality such as tapping an alert or banner to launch Campus Mobile directly to the relevant information.

As noted above, students can receive and manage push notifications using their smartphone when they have the Campus Mobile application installed. When the student first runs Campus Mobile they will be prompted to allow or deny push notifications from Campus Mobile. The user's device is associated with
their account in Campus Solutions using a unique identifier. A user can receive push notifications on multiple devices if they have installed the Campus Mobile application on multiple devices and allowed for push notifications on each device. A single device cannot have more than one user registered at a time; if a new user logs into Campus Mobile on a device that has previously been registered for push notifications, the device will be disassociated with the original user and only associated with the new user.

See “Setting Up Campus Mobile” for information on setup required in Campus Solutions to enable push notifications.

The notifications associated with Campus Mobile are:

- Final grade posted notification: This notification is triggered when a final grade is posted to a student record. The delivered notification template reads: “Dear [user], your final grade for {class} has been posted.” As with all notifications, your institution can edit this message template. The trigger for the notification is designed to capture any grade posting to a student’s record – whether through enrollment, grade roster, or another process. Each grade posting triggers a new notification – they are not batched into single messages when multiple grades are posted.

- Move from waitlist to enrolled notification: This notification is triggered when a student is on a waitlist and they are autoenrolled in a class when a seat becomes available. The delivered notification reads: “Dear [user], you have been enrolled in {class} from the waitlist.”

- Enrollment Appointment is Open: This notification is triggered by a batch process that determines which students have enrollment appointments opening the next calendar day. If a student has an enrollment appointment opening on the next calendar day they will receive a notification that as delivered reads: “Dear {user}, your enrollment appointment [{appt}] will be open on {date} {time}.”

- Checklist Has Been Updated: This notification is triggered by a batch process that determines whether a student has any new or updated checklists or checklist items. The delivered notification template reads: “Dear {user}, one or more items in your To Do list [{checklist}] has been created or updated.”

- Negative Service Indicator (Hold) Has Been Added or Changed: This notification is triggered by a batch process that determines whether a student has any new or updated negative service indicators. The delivered notification template reads: “Dear {user}, a hold has been assigned or changed regarding your record.”

- Negative Service Indicator (Hold) Has Been Removed: This notification is triggered by a batch process that determines whether a student has had any negative service indicators removed. The delivered notification template reads: “Dear {user}, a hold has been removed from your record.”

See Campus Mobile Implementation Guide posted to My Oracle Support

These notifications are delivered as part of the Campus Solutions Notification Framework. Information on the Campus Solutions Notification Framework is found in the Campus Solutions Application Fundamentals documentation. Information specific to the triggers and templates delivered for these notifications is found in the “Setting Up Campus Mobile” topics.

Related Links
Student Records
Understanding PeopleSoft Campus Self-Service Personal Information
Chapter 32

Using Self-Service Student Activity Guides

Understanding Student Activity Guides

Refer to the following topic in the Campus Community documentation:

"Understanding Student Activity Guides" (PeopleSoft Campus Solutions 9.0: Campus Community)

Using Student Task WorkCenter

Students can use the Student Task WorkCenter page to complete a task (that is, activity guide instance) assigned to them. The WorkCenter uses the delivered activity guide layout template (PTAILAYOUT) to present a task. When the student accesses the task for the first time, the WorkCenter displays the first action item page. If a student returns to a task that has already started, then the WorkCenter displays the first non-completed action item page.

Note that students can also access this Workcenter from the To Do List section in the Student Center and the Personal Data Summary page.

See Understanding Self-Service Student Center

See Displaying and Accessing Self-Service Personal Data

For information on the WorkCenter and activity guide icons and controls:

Chapter 33

Using Self-Service Notifications

Managing Notification Preferences in Self Service

Self-service users can set and update their preferences for how they receive notifications.

**Note:** These preferences are ignored if the Override Notification Preferences check box has been selected on the Notification Setup page. This capability is offered for situations where a recipient must be sent a notification even if the recipient has not set their preferences, and particularly relates to Delegated Access/New User Registration. See "Configuring the Generic Templates for Notifications Framework" (PeopleSoft Campus Solutions 9.0: Campus Community)

**Related Links**
"Managing Notification Preferences" (PeopleSoft Campus Solutions 9.0: Campus Community)

**Page Used to Manage Notification Preferences in Self Service**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Preferences</td>
<td>SS_CC_NTF_PREF</td>
<td>Self Service, Campus Personal Information, Notification Preferences</td>
<td>Set and update notification preferences.</td>
</tr>
</tbody>
</table>
Setting and Updating Self-Service Notification Preferences

Access the Notification Preferences page (Self Service, Campus Personal Information, Notification Preferences).

**Image: Notification Preferences (self service) page**

This example illustrates the fields and controls on the Notification Preferences (self service) page.

Self-service users can set their notification preferences, including which phone or email type should receive notifications. For example, users can set their phone type to one which can receive an SMS message.

Users must have at least one email or SMS type to be able to set a preference on these pages. If a phone or email address does not exist, a Define Emails link or Define Phone Numbers link appears.

Using the Self-Service Notifications Center

Generally, self-service users should access their notifications via their preferred email client, their phone for SMS messages and so on, but there may be situations where they need to check for notifications independently of their preferred methods, such as if they lose their phone. The Notifications Center is intended to meet that need and is located in the top level of the Self Service menu.

**Note:** Many Notifications Framework (NFK) consumer applications have extended the framework with extra fields and functionality that will not be presented in the Notifications Center. The consumer application should be the first point of call in normal circumstances.

The Notifications Center presents all notifications sent to a user so that they can:

- Review notifications by status (unread/unactioned or otherwise).
- Review by time periods.
- Search by specific dates.

No setup is required.
Related Links
"Using Admin Notifications" (PeopleSoft Campus Solutions 9.0: Campus Community)

Page Used to View Notifications

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Center</td>
<td>SS_CC_NTF_CENTER</td>
<td>Self Service, Notification Center</td>
<td>Self-service users view notifications.</td>
</tr>
</tbody>
</table>

Viewing Notifications in the Notifications Center

Access the Notifications Center page (Self Service, Notification Center).

Image: Notifications Center page

This example illustrates the fields and controls on the Notifications Center page.

In the Notifications Center:

- Each notification type has its own tab on which notifications of that type are shown.
- The notifications are shown in descending date and time order, so that the newest one is at the top of the list unless the user resorts the list by another column heading.
- The interface is the same for the Email and Alerts tabs except that the Email tab includes a From column and does not have a Status column.
• The SMS tab displays the SMS message text directly on the grid along with the date when the notification was received and importance of the notification.

**Image: Notifications Center page: SMS tab**

This example illustrates the fields and controls on the Notifications Center page: SMS tab.

**Sandy Kim**

**Notifications Center**

<table>
<thead>
<tr>
<th>Created</th>
<th>Importance</th>
<th>Message text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/03/2014 2:51:28AM</td>
<td>Low</td>
<td>This is a Test Template for SMS Notification Value 1 - Value 2 - Value 5 -</td>
</tr>
</tbody>
</table>

• The Worklist tab has an extra field called Life Left (Days) which shows the user how many days remain until the deadline on the work list item expires. Similar to the SMS and Alerts tabs, the Worklist tab does not include a From column.

**Image: Notifications Center page: Worklist tab**

This example illustrates the fields and controls on the Notifications Center page: Worklist tab.

**Sandy Kim**

**Notifications Center**

<table>
<thead>
<tr>
<th>Created</th>
<th>Importance</th>
<th>Status</th>
<th>Subject</th>
<th>Life Left (Days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/24/2013 9:01:03AM</td>
<td>Low</td>
<td>Ready</td>
<td>An evaluation has been added to your WorkList</td>
<td>2</td>
</tr>
<tr>
<td>06/24/2013 9:01:03AM</td>
<td>Low</td>
<td>Ready</td>
<td>Test Template for Worklist Notification</td>
<td>2</td>
</tr>
<tr>
<td>06/24/2013 9:01:02AM</td>
<td>Low</td>
<td>Unknown</td>
<td>An evaluation has been added to your WorkList</td>
<td>2</td>
</tr>
<tr>
<td>06/24/2013 9:01:02AM</td>
<td>Low</td>
<td>Ready</td>
<td>An evaluation has been added to your WorkList</td>
<td>2</td>
</tr>
</tbody>
</table>
• The Push tab displays the name of the application which sent the notification, the importance, and the message text.

**Image: Notifications Center page: Push tab**

This example illustrates the fields and controls on the Notifications Center page: Push tab.

*James Ryland*

<table>
<thead>
<tr>
<th>Notifications Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notifications Received</th>
<th>Application Name</th>
<th>Importance</th>
<th>Message text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/30/2014 3:49:47PM</td>
<td>CampusMobile</td>
<td>High</td>
<td>Dear James Ryland, your final grade for ENGLIT 100.1 has been posted.</td>
</tr>
<tr>
<td>01/29/2014 11:00:11PM</td>
<td>CampusMobile</td>
<td>High</td>
<td>Dear James Ryland, a hold has been assigned or changed regarding your record.</td>
</tr>
<tr>
<td>01/29/2014 11:04:10PM</td>
<td>CampusMobile</td>
<td>High</td>
<td>Dear James Ryland, your final grade for ENGLIT 100.1 has been posted.</td>
</tr>
</tbody>
</table>

• The Announcements tab displays all announcements that are still active as of the current date. They are displayed to all students. Unlike the other tabs, the Announcements tab cannot be filtered, and has additional From Date and To Date columns showing the duration of the announcement. Similar to the SMS tab, the announcement message is also directly displayed on the grid, so it has no Details link.

**Image: Notifications Center page: Announcements tab**

This example illustrates the fields and controls on the Notifications Center page: Announcements tab.

*Sandy Kim*

<table>
<thead>
<tr>
<th>Notifications Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date From</th>
<th>Date To</th>
<th>Importance</th>
<th>Message text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/03/2014</td>
<td></td>
<td>High</td>
<td>This is a test template for ALERT Notifications. Value 1 - Announcement Value 2 - AAAA Value 5 -BBBB</td>
</tr>
<tr>
<td>11/21/2013</td>
<td></td>
<td>Medium</td>
<td>This is a test template for ALERT Notifications. Value 1 - sdfsdftfts Value 2 - f Value 5 - fsdfsdfs</td>
</tr>
</tbody>
</table>

• The Notification Center page includes a Status field for the Worklist tab and a Period field for Email, SMS, Alert, Worklist and Push tabs which operate as follows:

Status: Select *Unread* or *Read* to filter the notifications. For worklist items these options equate to *Unactioned* and *Actioned*. The Notifications Framework has several statuses, and they are currently mapped to the options as follows:

• *A* (Acknowledge) and *W* (Worked) equal *Read/Actioned*.

• *R* (Ready), *S* (Selected), *T* (Timeout), and *U* (Unknown) equal *Unread/Unactioned*.

Period: Options are: *30 Days*, (anything in the last 30 days), *7 Days*, *Today*, and *Search*, which reveals a search subpage to allow the user to set specific date ranges.
When the search results are showing, the Period selector is highlighted in red to alert the user that the date range is filtered.

**Image: Notifications Center page: Period Search example**

This example illustrates the Period option of Search on the Notifications Center page.

- The Details link takes the user to a detailed view of each notification.

**Image: Notification Details page**

This example illustrates the fields and controls on the Notification Detail page.

This page enables the user to view more detail about a particular notification. If the notification is a worklist, this page includes the Importance and Life Left (Days) fields.
The Show Audit Info link accesses the Audit Information page which is used for diagnostic purposes and would not be of use to a standard user.
Understanding DLHE Self-Service Survey

Students use the self-service DLHE Survey feature to enter and submit the survey to an academic institution. Administrative users of an institution can use the feature to complete a survey on behalf of a student. After the academic institution collects the survey responses, they use the Campus Solutions HESA functionality to generate the DLHE return from the survey responses and then submit the return to HESA.

Survey Statuses

Each student DLHE record has a status field (SSR_HE_SURV_STATUS) that indicates the stage an individual student is in the survey process. The following table describes the statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>This status indicates that a student DLHE record has been created, but no survey data has been stored. This status allows an administrator or student to access the survey to input responses.</td>
</tr>
<tr>
<td>Saved</td>
<td>A record with a status of New moves to Saved once survey responses have been entered and the user clicks the Save button. This status indicates that the survey is incomplete and the user expects more information to be input. This status allows access to the user to previously saved surveys.</td>
</tr>
<tr>
<td>Submitted</td>
<td>The user indicates that they have completed the survey and wishes to submit their answers by clicking the Submit button. Once a survey is in a status of Submitted, it is closed to the student and only the administrator can add further responses.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Coded</td>
<td>For administrative use only. This status is used to indicate survey records that are complete. This indicates that the record has been reviewed by an administrator and is ready for extraction. For surveys entered by administrators, the status would change from either <em>New</em> or <em>Saved</em> to <em>Coded</em> once the manual survey process has been undertaken and the survey was deemed complete. For surveys entered via student self-service, an administrator would change <em>Saved</em> or <em>Submitted</em> surveys to <em>Coded</em> once additional coding had been done and the survey was deemed complete.</td>
</tr>
<tr>
<td>Excluded</td>
<td>For administrative users only. This status is used to indicate records that should be excluded from the survey population. The survey responses are retained.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>For administrative users only. This status indicates records should be excluded from the survey population. Survey responses already recorded are retained and not deleted.</td>
</tr>
</tbody>
</table>

Full details of the DLHE survey and return are available on the HESA website.

**Prerequisites**

Before individuals can use the DLHE Self-Service Survey feature, you must:

- Use the HESA Return Setup page to set up the DLHE survey.
- Create the survey records for the students. To identify the eligible students for inclusion in the DLHE survey and have the system automatically create survey records for the eligible students, run the Identify DLHE Target Population process. You can run the Import POPDLHE Survey Target List process to create the records for a survey. To manually create a student survey record, use the Survey Management – Add a Survey page.

**Related Links**

"Setting Up a HESA Return" (PeopleSoft Campus Solutions 9.0: Student Records)
"Preparing for Generating DLHE Return" (PeopleSoft Campus Solutions 9.0: Student Records)

**Entering and Submitting the DLHE Survey**

Students can access the Enter Survey page by clicking the Enter DLHE Survey link on the Student Center page (Self Service, Student Center).
The Enter DLHE Survey link appears on the Student Center page if all of the following conditions are met:

- A survey exists in the student DLHE record table.
- The DLHE survey status is either New or Saved.
- The current date falls between the Survey Start Data and Survey End Date defined for the qualifying period associated with the survey record.

The Enter DLHE Survey link does not appear if either:

- The DLHE survey status is Submitted, Coded, Excluded or Duplicate, or
- The current date is outside the survey period defined by the Survey Start Date or Survey End Date.

Alternatively, students can access the Enter DLHE Survey link from the Survey Link Pagelet, if your institution has deployed that pagelet. For more information, see "Using the Survey Link Pagelet" (PeopleSoft Campus Solutions 9.0: Student Records).
After clicking the Enter DLHE Survey link, the user selects a survey if more than one survey exists for a student on the Select Survey page and then proceeds to complete the sections A, B, C, D, E, and F.

**Image: Section A Self-Service page for students**

This example illustrates the fields and controls on the Section A Self-Service page for students. You can find definitions for the fields and controls later on this page.

You have been asked to complete this questionnaire because you have completed a higher education qualification within the survey period. Further information on the purpose of this survey and the use that will be made of the information you provide is available from the University. As you complete the section, you can Save and Return, navigate to Previous page, the Next page or navigate to the last page to Submit the Survey. Once the Survey is submitted, you will no longer be able to make changes.

**Your Education Summary**

Did the qualification you completed with us give you newly qualified teacher status in the UK?

- Yes
- No

**Section A: What were you doing on the census date?**

Please tick ALL the activities you were doing on the census date and then indicate which ONE of them is the most important to you.

Q1. On the census date were you . . . ?

- Working full-time (including self-employed, freelance, voluntary or other unpaid work, developing a professional portfolio/creative practice or on an internship/placement)
- Working part-time (including self-employed, freelance, voluntary or other unpaid work, developing a professional portfolio/creative practice or on an internship/placement)
- Due to start a job in the next month
- Engaged in full-time further study, training or research
- Engaged in part-time further study, training or research
- Taking time out in order to travel
- Unemployed
- Doing something else (e.g. retired, looking after home or family)

**Save**

Click to save the record updates.

**Previous**

Click to navigate to the previous page in the survey.

**Next**

Click to navigate to the next page in the survey.

Administrative users can navigate to these self-service sections using the Survey Management page (Navigate to Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Management. Then, on the Survey Management page, search for the survey and click the Enter Survey button for the survey).

The system disables or enables sections dynamically based on the user responses to the questions. The following list describes the validations:
• For Question 1 on Section A, if the user selects response 1 (working full-time) or 2 (working part-time), then the system displays Section B for the user to provide additional details regarding the student's paid and unpaid employment.

• For Question 1 on Section A, if the user selects response 5 (full-time study) or 6 (part-time study), then the system displays Section D for the user to provide additional details on further study, training and research.

• For Your Education Summary on the Section A page, if the student completed a qualification giving newly qualified teacher status, then the system displays Section C for the user to provide additional details regarding their teaching experience.

• Section E concerning the student's overall Higher Education experience is enabled for all surveys.

After completing the sections, the user submits the survey. At any time, the user can save the survey, and return later for completing and submitting the survey.

The following table describes the sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Used for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section A</td>
<td>Specifying whether the student is employed or undertaking further study, training or research on the census date.</td>
</tr>
<tr>
<td>Section B</td>
<td>Entering employment details.</td>
</tr>
<tr>
<td>Section C</td>
<td>Entering information concerning teaching experience.</td>
</tr>
<tr>
<td>Section D</td>
<td>Entering information concerning further study, training or research.</td>
</tr>
<tr>
<td>Section E</td>
<td>Entering information concerning the student's overall higher education experience.</td>
</tr>
<tr>
<td>Section F</td>
<td>Reviewing the status of each survey section and submitting the survey. This section displays the Incomplete Questions list where the asterisk (*) indicates the required questions. See &quot;Configuring HESA&quot; (PeopleSoft Campus Solutions 9.0: Student Records) for information about the Allow incomplete submission and Require mandatory questions check boxes.</td>
</tr>
</tbody>
</table>

For more information on how administrative users use the DLHE self-service pages, see "Adding, Viewing, and Updating Surveys" (PeopleSoft Campus Solutions 9.0: Student Records).