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PeopleSoft

PeopleSoft Campus Solutions 9.2: Self Service

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PeopleSoft Campus Solutions 9.2: Self Service
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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.

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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.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	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.

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

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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)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

PeopleSoft CS Related Links

Hosted Online Help Home

PeopleSoft Information Portal

My Oracle Support

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

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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.

Self-service functionality is available through classic or PeopleSoft Fluid User Interface.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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, read all of the setup topics in this documentation, Campus Solutions Application Fundamentals, and Campus Community Fundamentals. 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:

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- 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.

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- 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.

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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.

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See Campus Community Fundamentals.

For information about deferred processing, see "Additional Information for Getting Started with Campus Solutions" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

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Chapter 2

Setting Up Self-Service Navigation

Setting Up Self-Service Navigation

Use the Navigation Tabs Setup (SSS_NAV_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

Page Name	*Definition Name*	*Navigation*	*Usage*
Navigation Tabs Setup	SSS_NAV_SETUP	Set Up SACR > Common Definitions > Self Service > Navigation Tabs > Navigation Tabs Setup	Define tabs for self-service applications.

Defining Tabs for Self-Service Applications

Access the Navigation Tabs Setup page (Set Up SACR > Common Definitions > Self Service > Navigation Tabs > Navigation Tabs Setup).

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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.

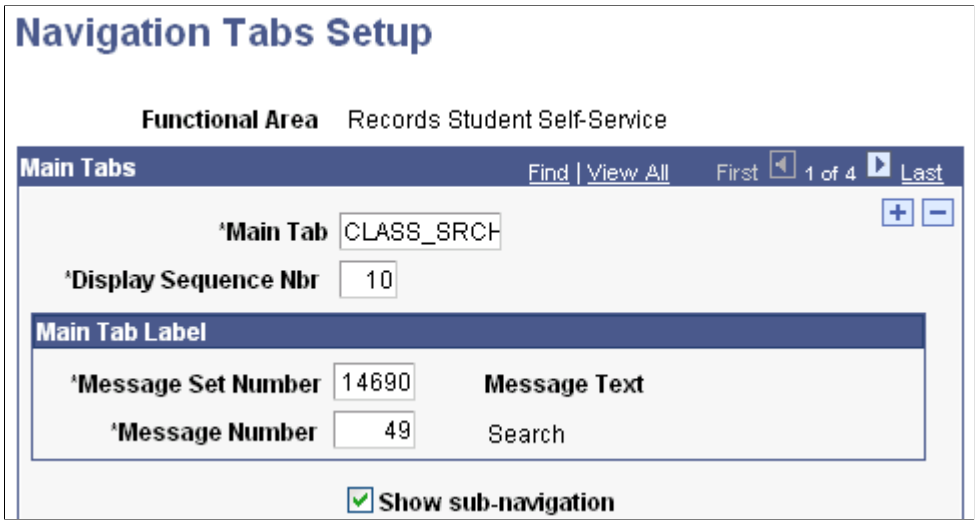

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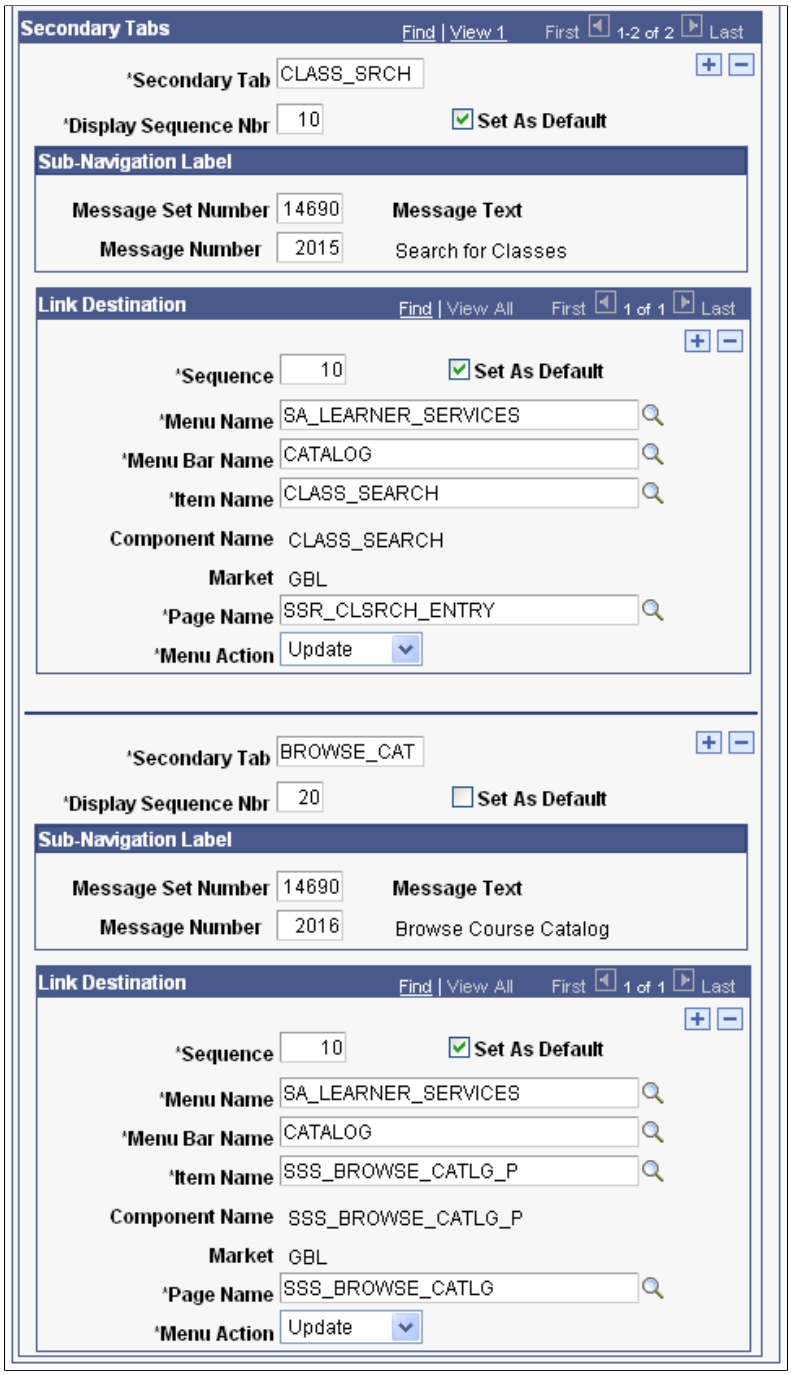
Image: Navigation Tabs Setup page (2 of 2)

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.

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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.

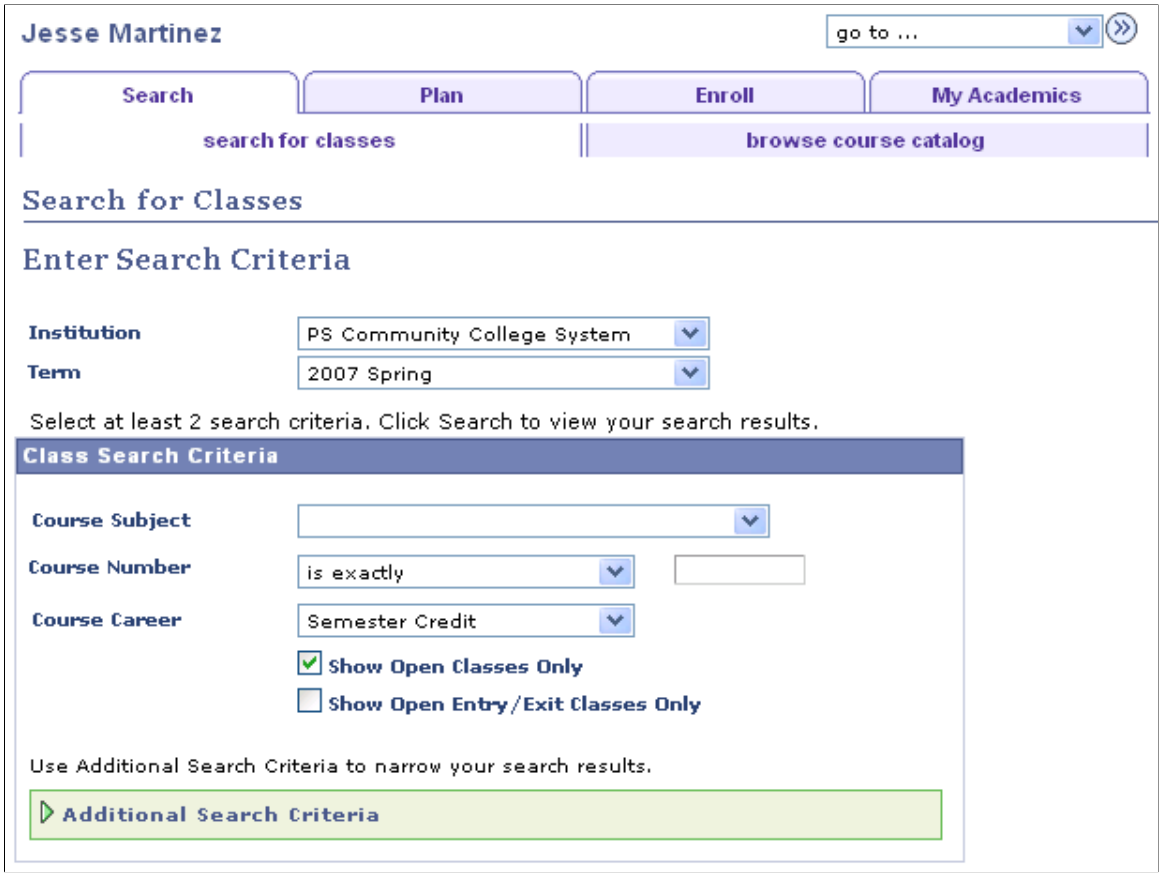
Only users with security access to the Navigation Tabs Setup component can configure the tabs.

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.

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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:

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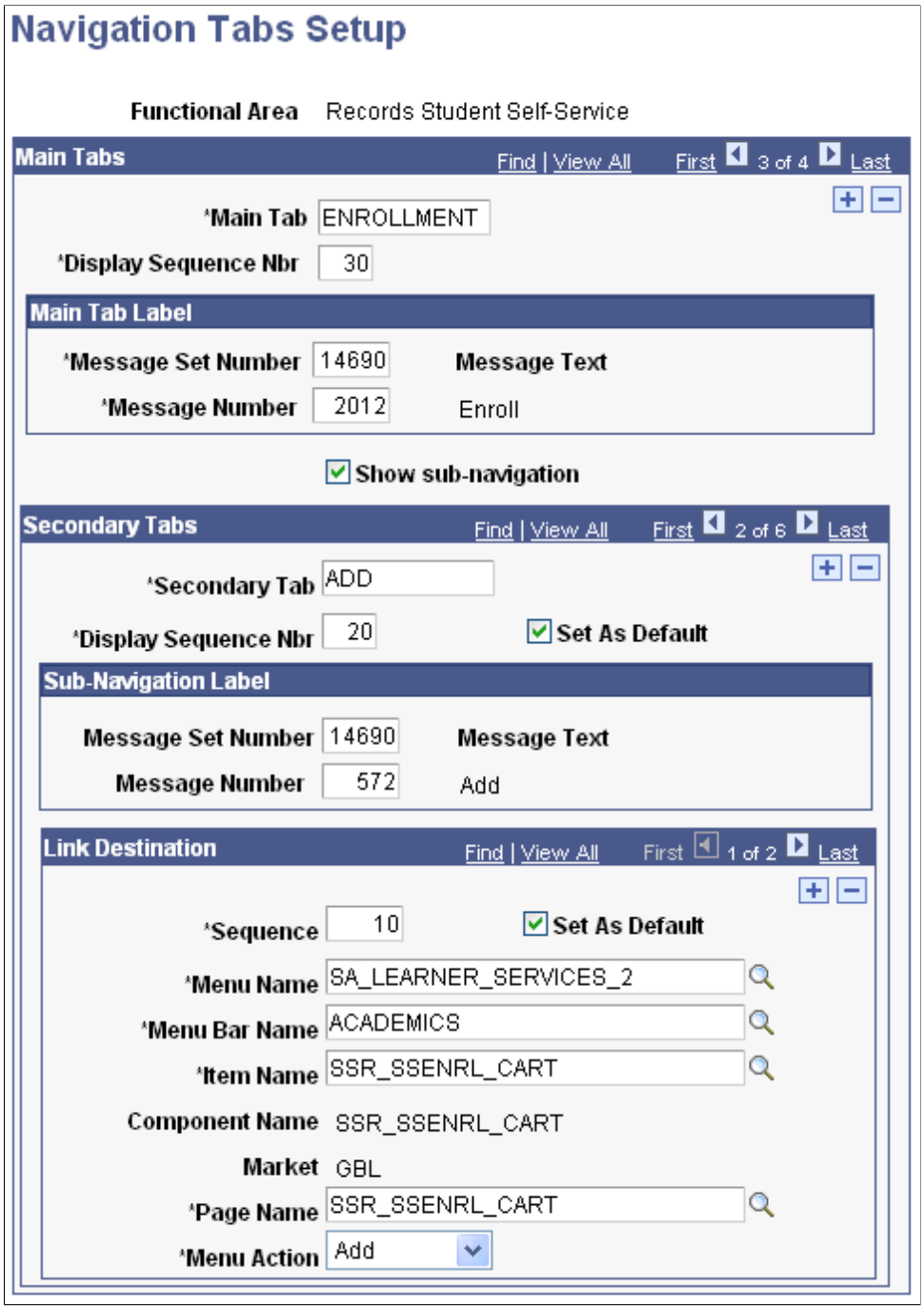
Image: Example of setup for the add tab using SA_LEARNER_SERVICES_2

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.



The add tab in Self Service uses the version of the component with the Select check box:

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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.

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Chapter 3

Setting Up Type Control

Setting Up Type Control

This section discusses how to set type controls.

Page Used to Set Up Type Control

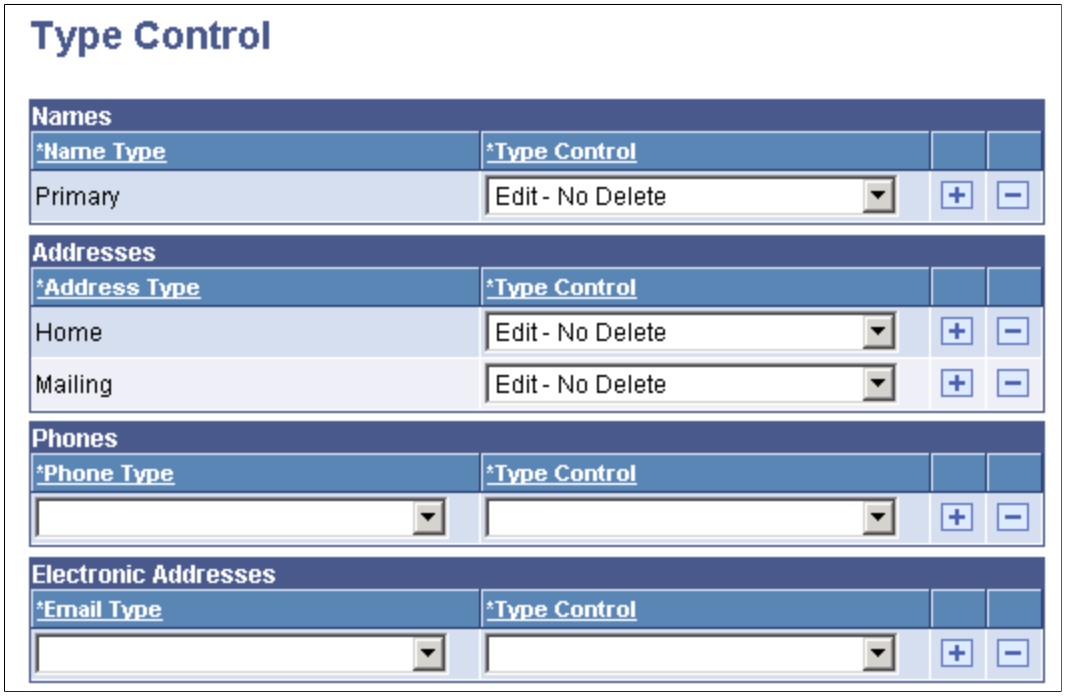
Page Name	*Definition Name*	*Navigation*	*Usage*
Type Control	TYPE_CNTL_SETUP	Set Up SACR > Common Definitions > Self Service > Type Control	Set type controls to identify the types of names, addresses, phones, and email addresses for self-service users to view, edit, or delete.

Setting Type Controls

Access the Type Control page (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.



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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.
Campus Solutions delivers Name Type and Address Types with *Edit - No Delete* type control level. You cannot apply the lesser restrictive control of *Full Edit* to these types. 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. This is why 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.

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Chapter 4

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 9.2: 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 9.2: 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.

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- Set up other graduation options.
- Display class schedules in Fluid user interface.
- Display meeting schedules in Fluid user interface.
- Display instructor contact information in Fluid user interface.

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

Page Name	*Definition Name*	*Navigation*	*Usage*
Enrollment	SSR_SS_ENRL_OPT	Set Up SACR > Common Definitions > Self Service > Student Records > Enrollment	Enable self-service features and define parameters and rules for self-service Student Records functionality.
Other	SSR_SS_OTHR_OPT	Set Up SACR > Common Definitions > Self Service > Student Records > Other	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.
Weekly Schedule Time Periods	SETUP_TIME_PERIODS	Set Up SACR > Product Related > Student Records > Enrollment > Weekly Schedule Time Periods	Define the times that define the ranges of time that the system displays on the Weekly Schedule page for both instructors and students. Campus Solutions 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.
Academic Institution 8	SSR_INST_TBL_GRAD	Set Up SACR > Foundation Tables > Academic Structure > Academic Institution Table > Academic Institution 8	Set up self-service graduation at the institution level; however, these settings can be overridden at the career or program level.
Name Display Type	SCC_NMD_TYP_TBL	Click the Add Name Display Type link on the Academic Institution 8 page.	Define how names appear for graduation.
Name Display Type Parameters	SCC_NMD_TYP_PRM	Click the Edit Parameters button on the Name Display Type page.	Further define how names appear.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Self Service Options	SSR_ACDCAR_SELFSRV	Set Up SACR > Foundation Tables > Academic Structure > Academic Career Table > Self Service Options	Set up for career-specific usage of the graduation tracking process.
Graduation	SSR_PROG_TBL_GRAD	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Graduation	Set up for program-specific usage of the graduation tracking process.
View My Classes Options	SSR_VWCLSCHDOPT_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup > View My Classes Options	Select how the initial page displays class schedules.
Meeting Schedule Option	SSR_MTGSCHDOPT_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup > Meeting Schedule Options	Determine the number of meeting patterns that appear for each class in Fluid user interface.
Instructor Contact Options	SSR_INSTRDSP_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Instructor Contact Options	Set up the options for displaying instructor information on the Class Information modal page for View My Classes, Drop Classes, Shopping Cart, and Class Search in Fluid user interface.
Class Label Setup – Small Form Factor Class Label Setup – Non-small Form Factor	SSR_CLASSLBL1_FL SSR_CLASSLBL2_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Label Setup	Set up labels for mobile devices and desktops or laptops
Class Information Setup	SSR_CLSINFOSET_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Information Setup	Set whether or not students or instructors can view textbook information on the Class Information page using Fluid user interface.

Defining Student Records Setup

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

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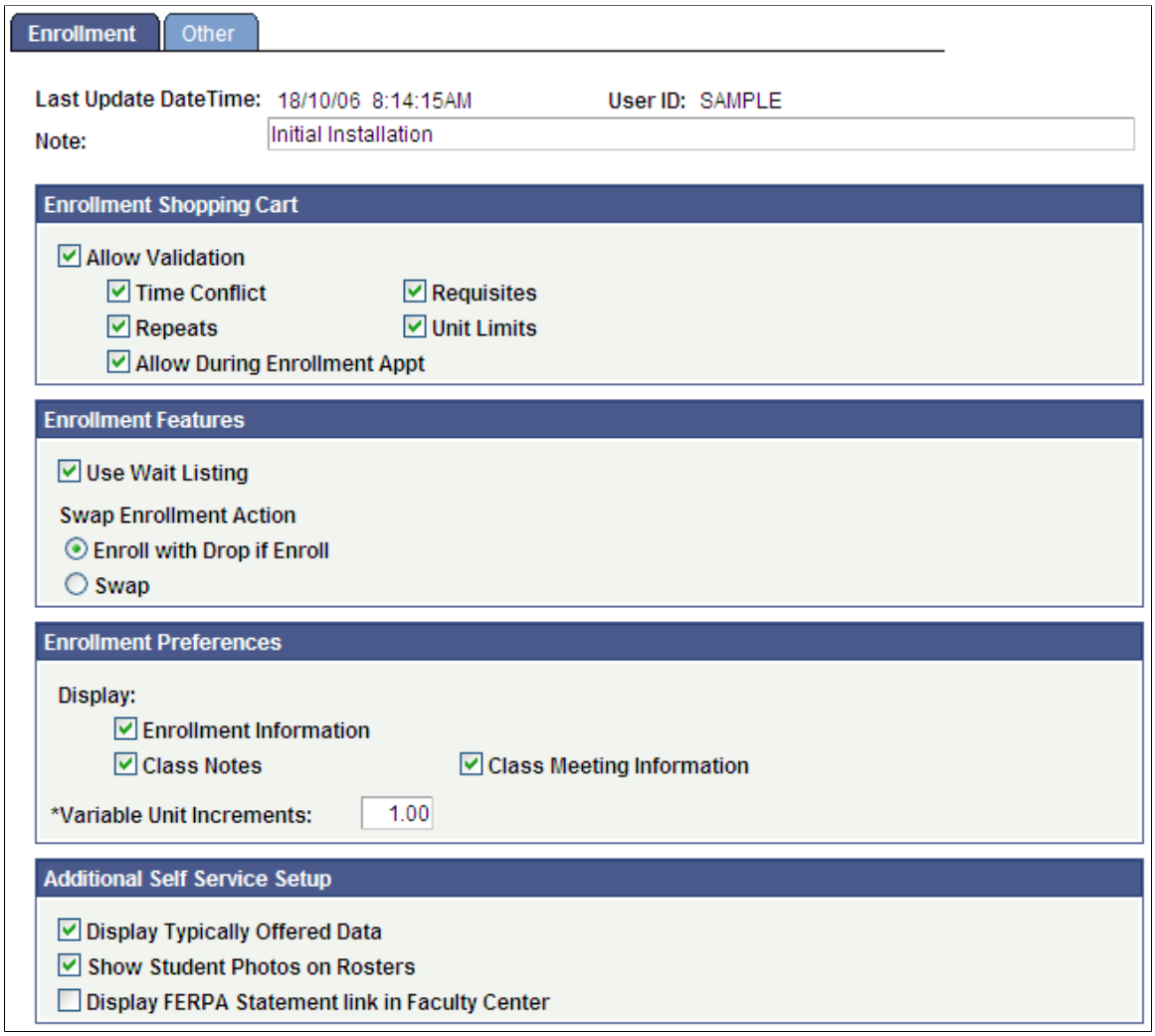
Image: Enrollment page

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



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

Enrollment Shopping Cart

Note: These features are also used to set up Class Search and Enrollment for PeopleSoft Fluid User Interface.

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

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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.

Note: This field is used to set up Class Search and Enrollment for PeopleSoft Fluid.

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

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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

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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.

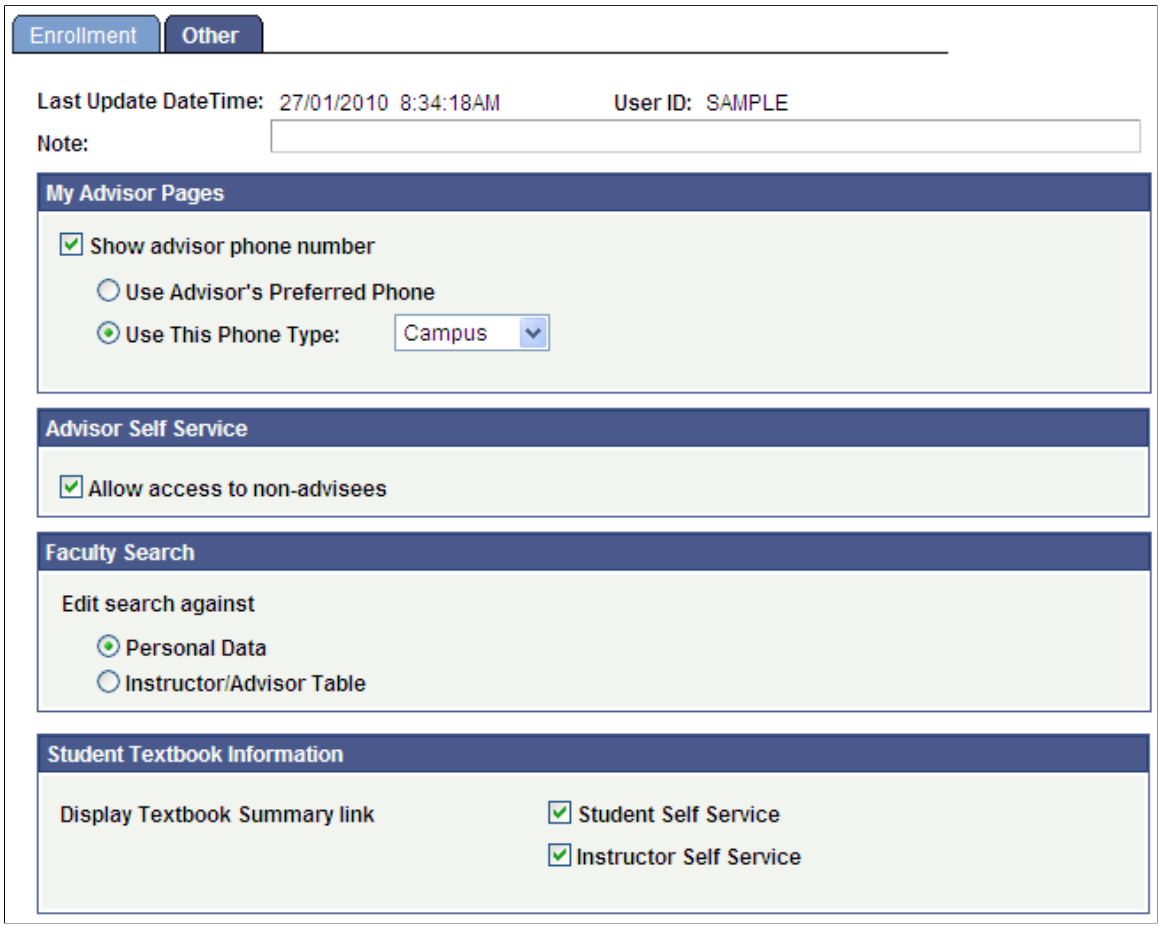
Show Student Photos on Rosters Select this check box if you want student photos to appear on the class and advisee rosters in the Faculty Center.

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.



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.

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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.

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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 9.2: 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. Campus Solutions 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:go to Tools, Internet Options, Advanced, Printing, then select Print background colors and images." Without this setting, the schedule is printed 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).

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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.

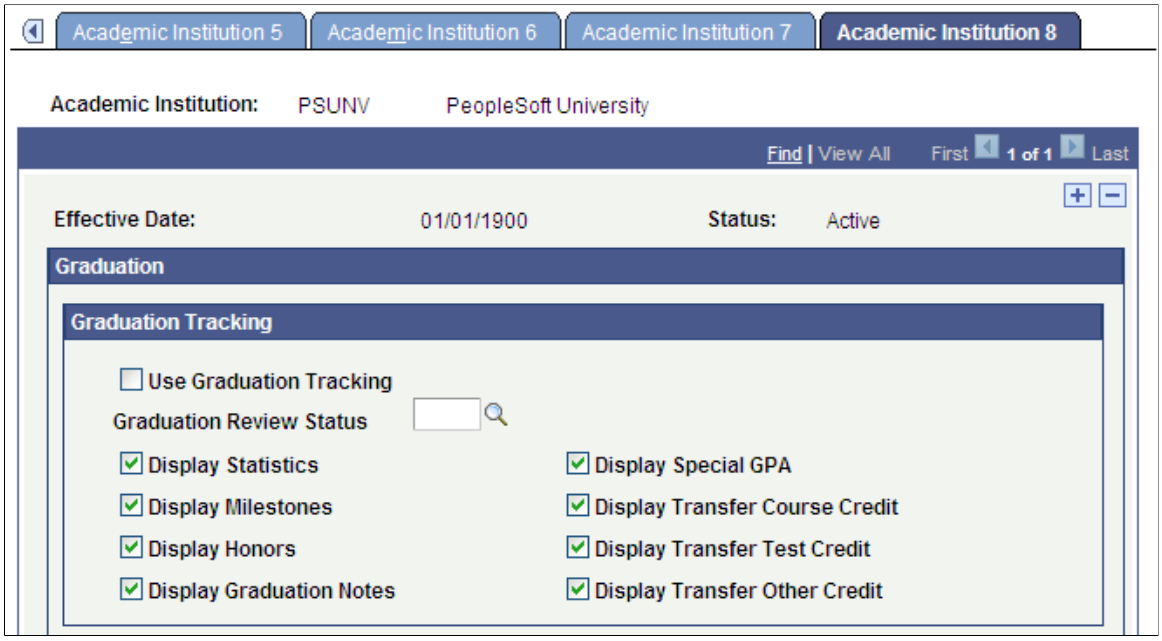

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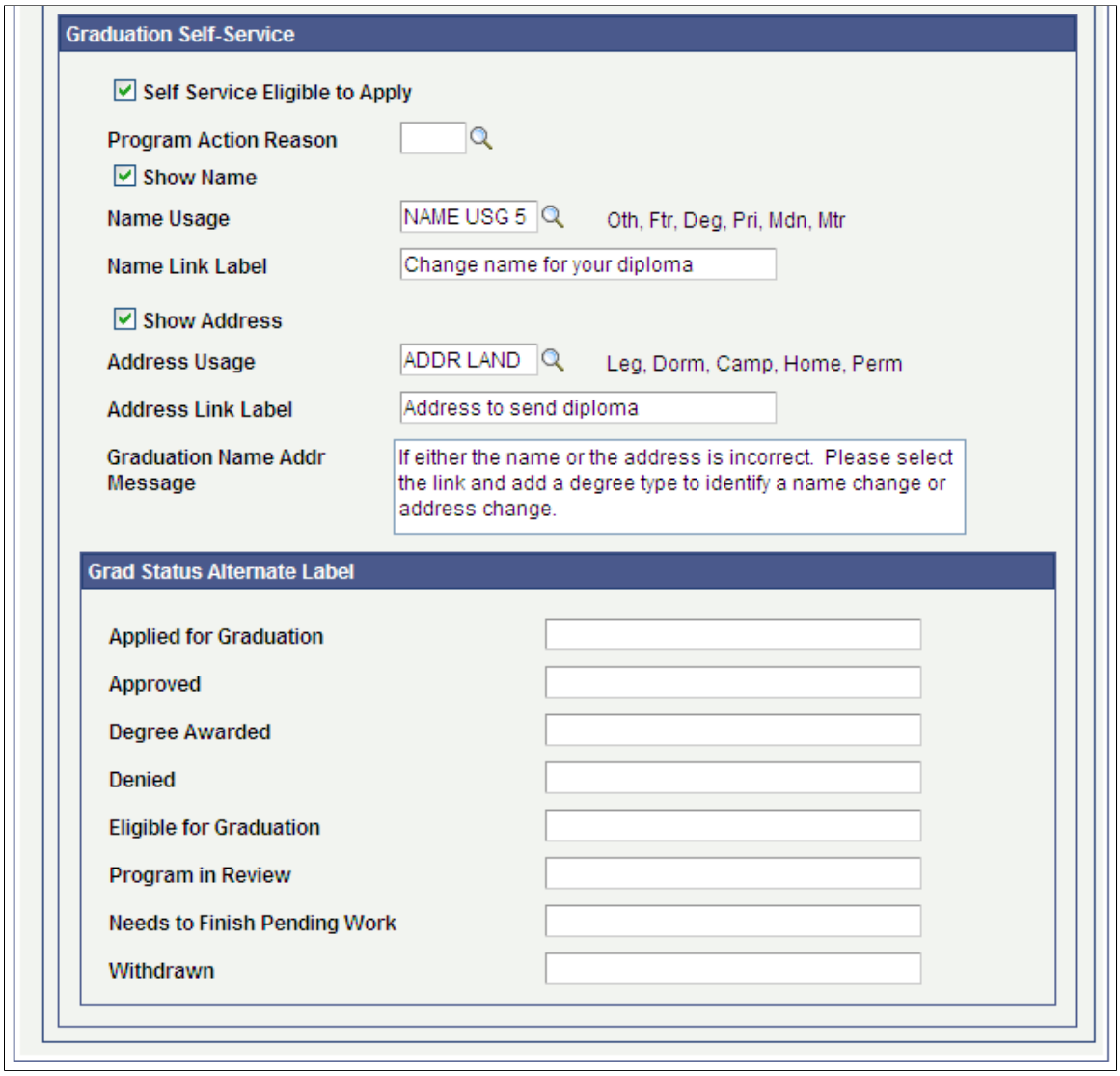
Image: Academic Institution 8 page (2 of 2)

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 use graduation tracking. If you do not, then a selection made at either the career or the program level determines 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.

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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 appears 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 a text label. This label appears as a link when the Show Name check box is selected. When students click this link, they are directed 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 is the name type that is 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 is 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 a text label. This label appears as a link when the Show Address check box is selected. When students click this link, they are directed to the Self Service Campus Community page where they can change their addresses.

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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

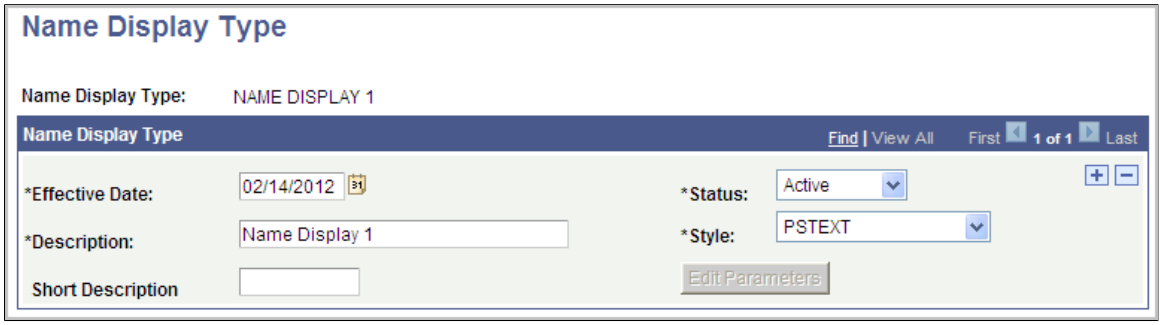
The fields in this group box allow the institution to display a different message for the various degree checkout values.

Defining a Name Type Display

Access the Name Display Type page (click the Add Name Display Type link on the Academic Institution 8 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 appears for graduation. This functionality is available only 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 appear.

Configuring Name Display Rules

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

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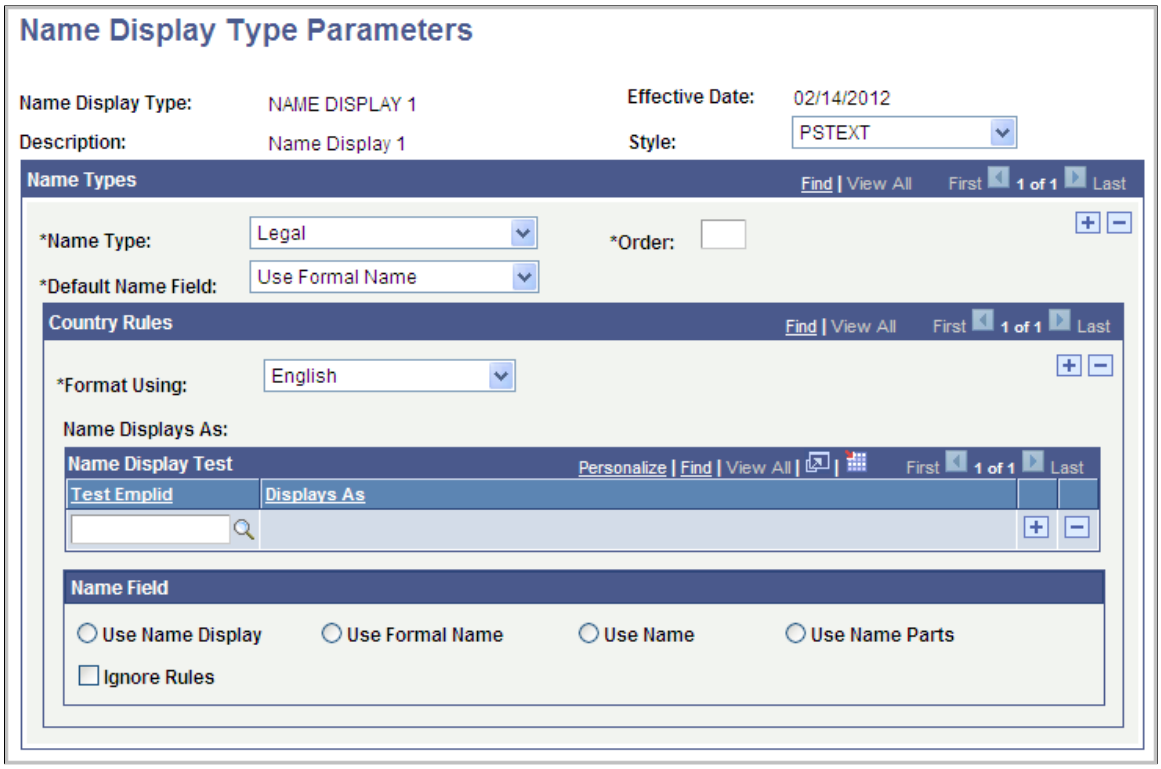
Image: Name Display Type Parameters page

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

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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 how the name appears part by part as you go; the appearance of each ID added to the Name Display Test group box refreshes each time you change any field. 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 are 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).

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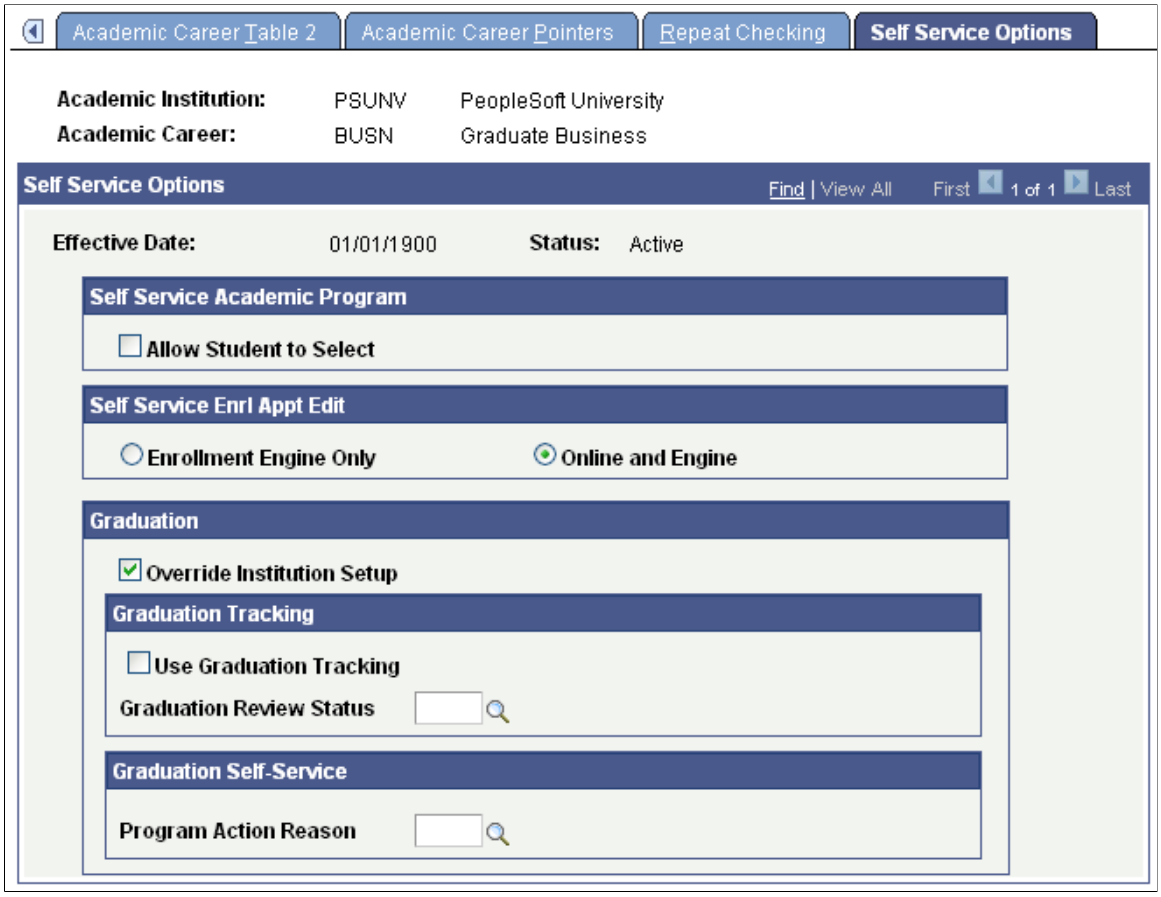
Image: Self Service Options page

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).

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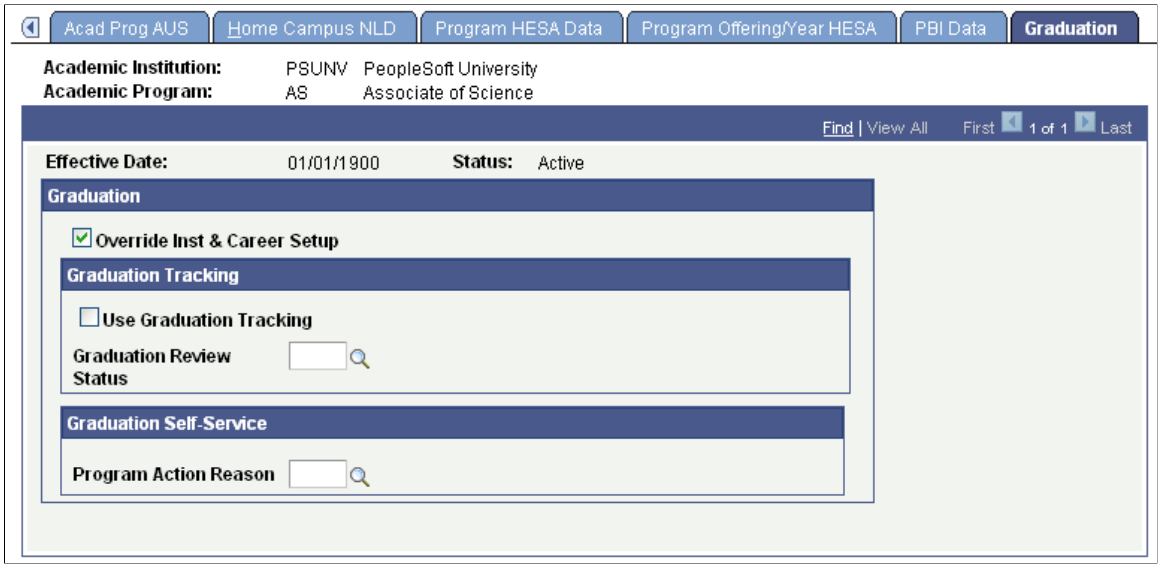
Image: Graduation page

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 (Override Institution and 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.

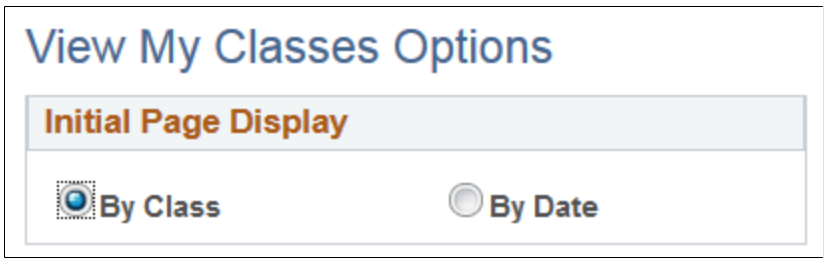
Program Action Reason — Select the appropriate program action reason.

Displaying Class Schedules in Fluid User Interface

Access the View My Classes Options page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup > View My Classes Options).

Image: View My Classes Options page

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



Use this page to select whether the initial page displays the class schedules *By Class* or *By Date*.

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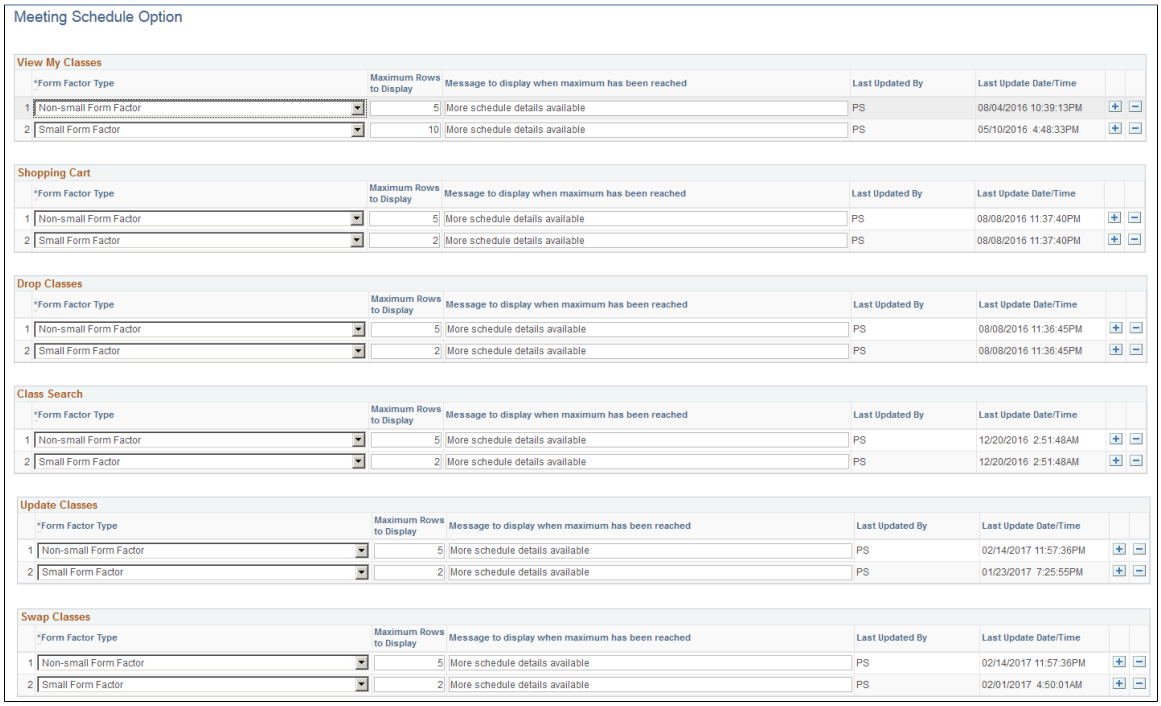
Displaying Meeting Schedules in Fluid User Interface

Access the Meeting Schedule Option page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup > Meeting Schedule Options).

Image: Meeting Schedule Option page

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



Use this page to set the number of meeting patterns that appear for each class in Fluid user interface.

Form Factor Type

Set the form factor on which the schedules appear.

- Non-small Form Factor: tablets, laptops, desktops.
- Small Form Factor: smartphones.

Maximum Rows to Display

Define the maximum number of schedules that appear on the View My Classes – By Class, Shopping Cart, Drop Classes, Class Search, Update Classes, or Swap Classes pages.

The maximum number of schedules that appear on the page is 10. If you do not configure the Meeting Schedule Option, by default the maximum number of schedules is displayed.

Message to display when maximum has been reached

Set the message that appears to students when there are more schedules than the maximum number of rows you have set to appear on the View My Classes – By Class, Shopping Cart, Drop Classes, Class Search, Update Classes, or Swap Classes pages.

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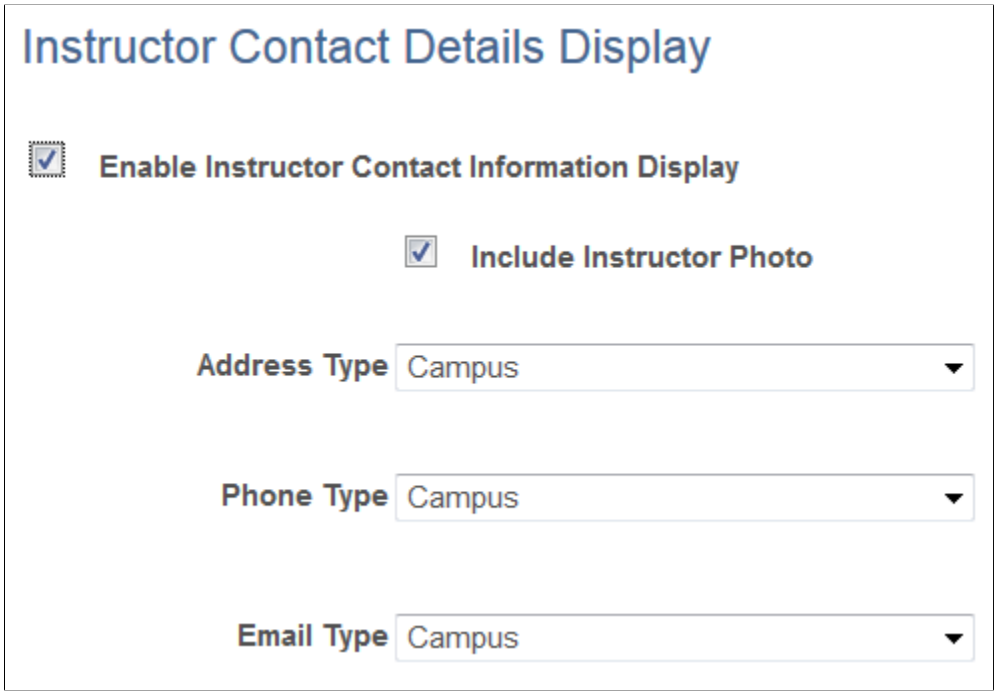
Displaying Instructor Contact Information in Fluid User Interface

Access the Instructor Contact Details Display page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Instructor Contact Options).

Image: Instructor Contact Details Display page

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



Displaying Class Labels in Fluid User Interface

Access the Class Label Setup page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Label Setup).

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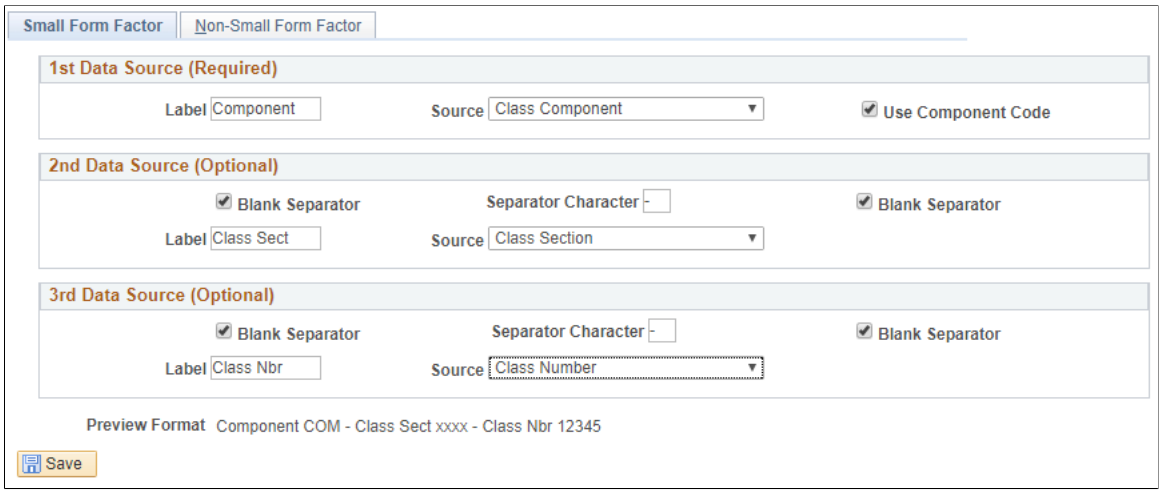
Image: Class Label For Small Form Factor

This example illustrates the fields and controls on the Class Label For Small Form Factor. You can find definitions for the fields and controls later on this page.



Use these pages to display class information like class section and class number in Class Search results for mobile devices (small form factor) or desktops and laptops (non-small form factor) in Fluid user interface. The fields on the Small Form Factor page applies to the Non-Small Form Factor page.

Preview Format As you assign values to the various data sources on this page, this field automatically adjusts to show you an example of how the label appears on Fluid user interface.

1st Data Source (Required)

Use this group box to set up the first data source as a component. These fields apply to the 2nd and 3rd Data Source.

Label Enter the label you want to use. This label appears on the user interface.

Source Select *Class Component*.

For the 2nd and 3rd Data Source group boxes, select either Class Section or Class Number.

Use Component Code Select to display the component code.

2nd and 3rd Data Source (Optional)

This group box is optional. However, you can use this to include class section to classes when viewed in PeopleSoft Fluid User Interface. To include class section in Fluid, set the Source field to *Class Section*.

Blank Separator Select this check box to insert a blank space between the label and source.

Separator Character Enter a character, for example, a dash. This character is inserted between the label and the source to visually separate the text.

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Blank Separator Select this check box to insert a blank space between the label, separator character, and source.

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 appear on the Student Center page. You can also use the Student Center Options page to configure some of the individual items that 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

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Center Options	SSS_STDNCTR_OPT	Set Up SACR > Common Definitions > Self Service > Student Center	Define the sections that you want to appear to your students in the self-service Student Center.

Defining Self-Service Student Center Setup Options

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

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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.

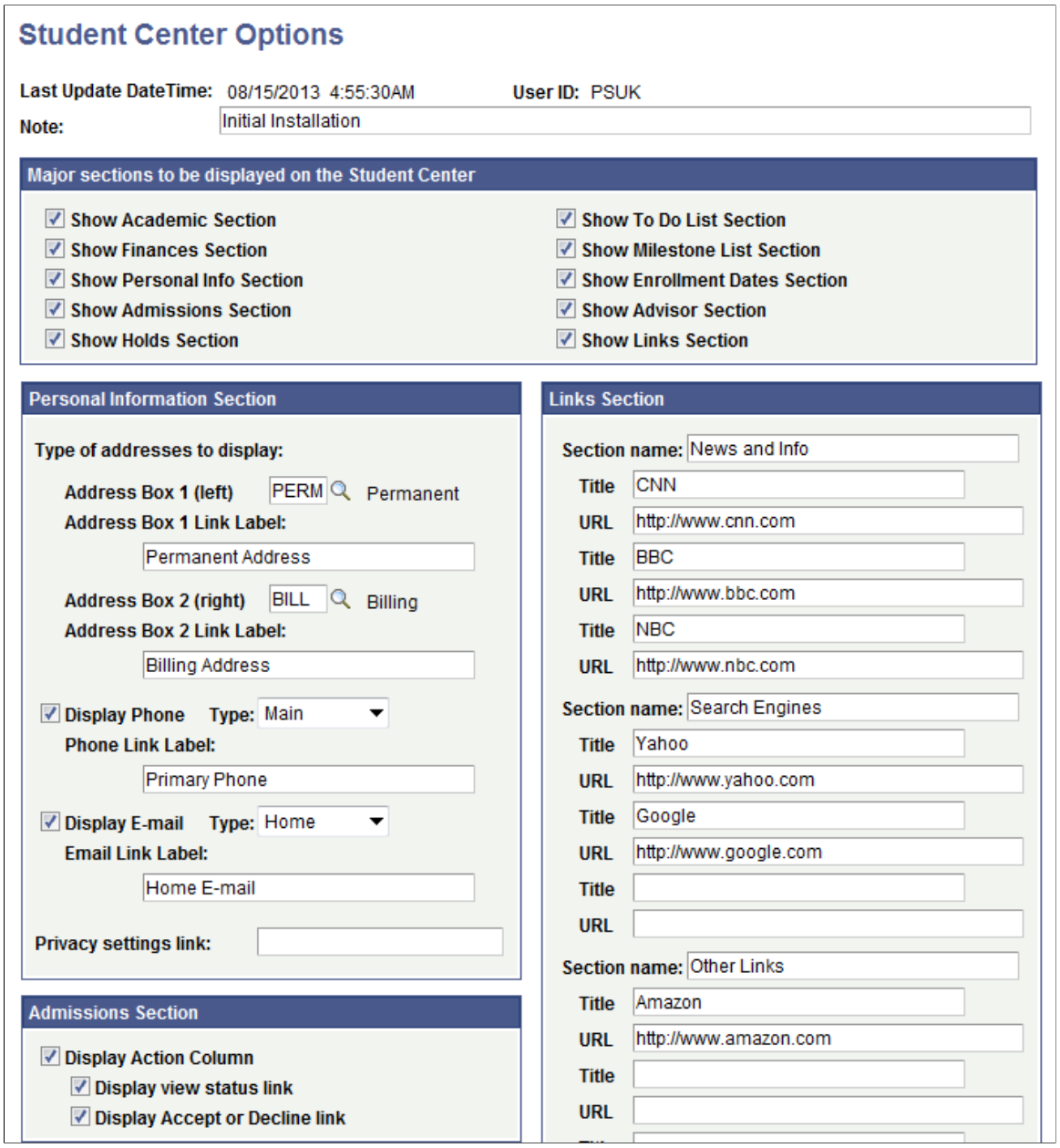

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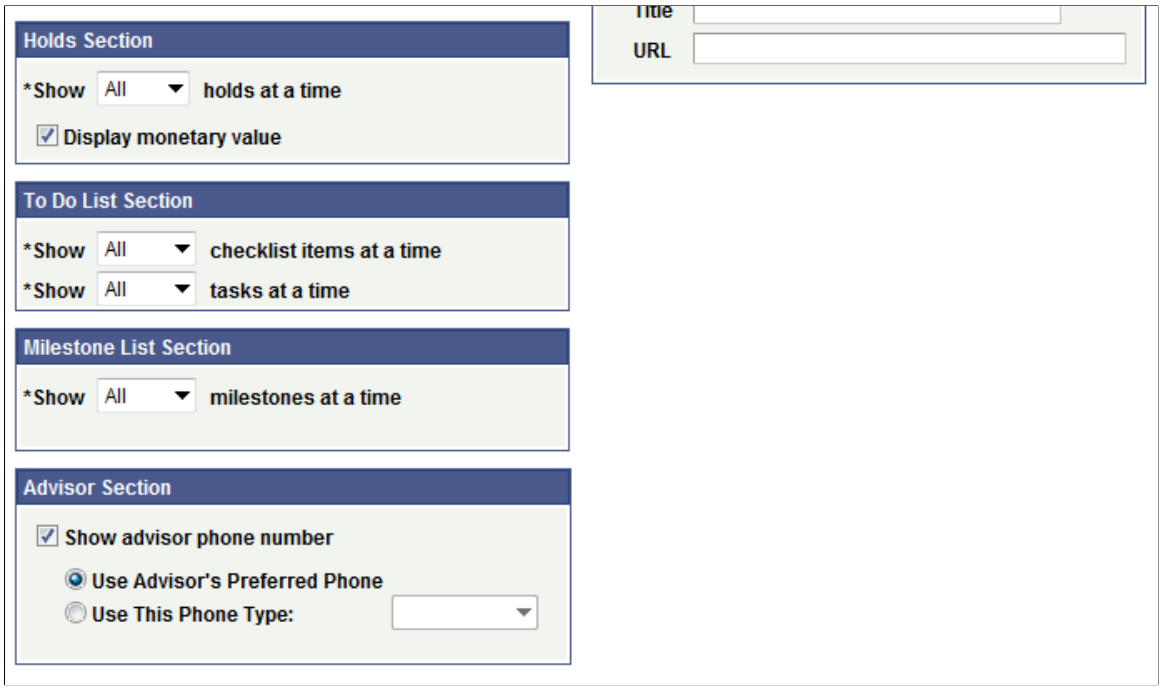
Image: Student Center Options page (2 of 2)

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.

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Show Holds Section	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.
Show To Do List Section	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.
Show Milestone List Section	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 "Setting Up Milestones" (PeopleSoft Campus Solutions 9.2: Student Records)
Show Enrollment Dates Section	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.
Show Advisor Section	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.
Show Links Section	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.

Personal Information Section

Address Box 1 (left) and **Address Box 2 (right)**	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.
Address Box 1 Link Label and **Address Box 2 Link Label**	Enter the label to be displayed for the address links on the Student Center page.
Display Phone	Select to display the student's phone number on the Student Center page.
Type	Enter a phone type to display. Only phone types that are set up on the Type Control page as Display Only, Edit - No Delete, or Full Edit are available.
Phone Link Label	Enter the label to be displayed for the phone link on the Student Center page.

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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 directs 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 can 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.

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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 are 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.

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Chapter 5

Setting Up Search in PeopleSoft Fluid User Interface

Understanding Search in PeopleSoft Fluid User Interface

To implement and use search in PeopleSoft Fluid User Interface, Campus Solutions uses PeopleSoft Search Framework. This framework uses facets and keyword search to provide a flexible way to search for courses and classes, and is paired with Elasticsearch as its search engine. Campus Solutions uses PeopleSoft Search Framework with Elasticsearch for a scalable search solution with near-real time searches.

If you want to use Fluid user interface to search for classes and courses, you must use PeopleTools 8.5.12 (or later) and Elasticsearch.

To implement search, you must:

1. Deploy and Configure Elasticsearch.
2. Configure PeopleSoft Search Framework for search in PeopleSoft Fluid User Interface.
3. Configuring search options in PeopleSoft Fluid User Interface.
4. Build indexes for class and course search.

Deploying and Configuring Elasticsearch

Elasticsearch is an open source search engine used for the PeopleSoft Search Framework for PeopleSoft 9.2 applications. It is based on Apache Lucene™, a Java-based information retrieval library. Elasticsearch is provided as a deployment package (DPK) that delivers the required Elasticsearch software version, as well as Java-based plug-ins needed for integration with PeopleSoft environments.

In Campus Solutions, Elasticsearch is used in search for classes and courses in PeopleSoft Fluid User Interface, which provides better performance in indexing and results retrieval. When you create the database, make sure you select ES (Elasticsearch).

For information on how to deploy and configure Elasticsearch to support search for classes and courses in PeopleSoft Fluid User Interface, see PeopleTools 8.55.11 or Higher Elasticsearch Home Page on My Oracle Support (Doc ID 2205540.2).

Note: To use search in PeopleSoft Fluid User Interface, make sure you use PeopleTools 8.55.12 or later. Search results for classes and courses are organized independently of Elasticsearch.

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Configuring PeopleSoft Search Framework for Search in Fluid

This section discusses how to do the following to configure PeopleSoft Search Framework for Campus Solutions search in PeopleSoft Fluid User Interface:

- Configuring Facets
- Deploying Search Definitions

For information on search definition deployment, mapping search attributes, and facets, see *PeopleTools: Search Technology*:

Configuring Facets

Facets are attributes that are used to filter and narrow down a set of search results, which can be a part of one or more search definitions. Facets provide an alternate representation of the list of values for a given attribute.

Campus Solutions provides a number of facets to allow you to filter search results for classes and courses. For classes, the facets are similar to the search parameters you use when performing a class search using the classic interface. This means you can have a varying number of facets for small form factor (smartphones) and large form factor devices (tablets, laptops, desktops). You may wish to deploy a smaller number of facets for smartphones because of the smaller screen size, and a larger number of facets for laptops because of the bigger screen size.

The following facets have been delivered and deployed for small and large form factor devices (unless otherwise noted), and derive actual data values except for the ones marked with an asterisk (*). Facets marked with an asterisk require you to specify the values you want displayed.

Note: Oracle does not recommend adding additional facets outside of the delivered ones because searching for classes and courses has been deployed to work with the provided system facets.

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Facets for Class Search	*Facets for Course Search*
• Class Status • Course Career • Subject • *Number of Units • Location • Campus • Academic Session • Shift • *Class Meeting Days • *Class Start Times • *Class End Times • Class Component • Instruction Mode • Requirement Designation • Class Attribute • *CAF Option 1 • *CAF Option 2 • *CAF Option 3 • *CAF Option 4. This has been deployed for tablets or laptops. If necessary, you can deploy it for smartphones. • *CAF Option 5. This has been deployed for tablets or laptops. If necessary, you can deploy it for smartphones.	• Course Career • Subject • Academic Organization • Campus • Component • Typically Offered • *Number of Units • Grading Basis • Requirement Designation • Course Attribute • Open Entry/Exit

Oracle recommends that you deploy around 7–10 facets for optimum performance and to avoid excessive scrolling, especially for smartphones.

If you do not want to use a facet, you can deselect it from the search definition or Search Category.

Deploying Search Definitions

Access the Deploy Search Definition page (PeopleTools >Search Framework >Administration >Deploy/Delete Object).

Use the Deploy Search Definition page to deploy or undeploy a search definition.

Campus Solutions provides the following search definitions:

- SSR_CLASS_SEARCH_LFF for large form factor devices (tablets, laptops or desktops)

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- SSR_CLASS_SEARCH_SFF for small form factor devices (smartphones)
- SSR_BROWSE_CATALOG_LFF for large form factor devices (tablets, laptops or desktops)
- SSR_BROWSE_CATALOG_SFF for small form factor devices (smartphones)

Depending on the type of device you want to use to perform search in PeopleSoft Fluid User Interface, you can choose to deploy any one of these search definitions. If you want to use both types of device, you must deploy both search definitions.

Note: You should use *only* the delivered facets. Do not add additional facets to the search definitions that have not been provided by Campus Solutions.

If you do not want to use a facet, you can remove it from the search definition. If you remove a facet from a search definition, you must run a full build index. This removes the facet from the index.

To remove a facet from a search definition:

1. Access the Deploy Search Definition page, select the search definition, then click Undeploy.
2. Go to the Search Attribute Mapping page (Peopletools, Search Framework, Designer, Search Definition, Map Search Attributes).
3. To remove an attribute that you do not want to use as a facet, deselect the corresponding Is Faceted check box. You can also deselect the corresponding Field to Index check box.

   Note: For class search, do not remove Class Status from the search definition. This means the check boxes Is Faceted and Field to Index *must* remain selected.

   ---

4. Save the record.
5. Go to the Facets page (Peopletools, Search Framework, Designer, Search Category, Facets).
6. From the Facets page, select Auto detect facets, then save.

   From the Facets page, you can use the Sequence column to change the order in which facets are displayed in search in PeopleSoft Fluid User Interface.

7. Go to the Deploy Search Definition page, select the search definition you modified, then click Deploy.

   If the Crawl Status indicates *Not Crawled*, it means that the full build index process must be run.

Alternatively, you can remove facets that are included in a search definition by deleting them from the search category. To do this:

1. Access the Search Category page (Peopletools >Search Framework >Designer >Search Category).
2. Look for the search definition whose facets you want to remove, and then select it.
3. Click Facets.
4. If Auto detect facets is selected, deselect it.
5. Click the corresponding minus sign (–) of the facet you want to remove.

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6. If you want to re-order the facets, use the Sequence column.
7. Click Save.
8. To check that the facets have been removed, log in and out of the system. The facets no longer appear in search results.

When you remove facets using the Search Category page, you do not have to run a full build. This means the facet index still remains and could add time when performing search queries. You can also use this page to add delivered facets.

Configuring Search Options in PeopleSoft Fluid User Interface

This section discusses how to configure various display options for searching classes and courses in PeopleSoft Fluid User Interface.

Related Links

Displaying Class Schedules in Fluid User Interface
Displaying Meeting Schedules in Fluid User Interface
Displaying Instructor Contact Information in Fluid User Interface
Displaying Class Labels in Fluid User Interface

Pages Used to Configure Search Options in PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Navigation*	*Usage*
Class Search Setup	SSR_CLSRCH_OPT_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Setup	Set up the various controls and display for Class Search and Enrollment within PeopleSoft Fluid User Interface.

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Page Name	Definition Name	Navigation	Usage
• Class Search Filters – Units • Class Search Filters – Meeting Times • Class Search Filters – Meeting Days • Class Search Filters – Common Attributes (CAF)	• SSR_FACETS_UNITS • SSR_FACETS_TIME • SSR_FACETS_DAYS • SSR_FACET_CAF_ATTR	• Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Filters >Units • Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Meeting Times • Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Meeting Days • Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Common Attributes (CAF)	Configure filters when you use facets in class search definition.
Class Option Setup	SSR_CLSOPTN_OPT	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Option Setup	Define whether time conflicts are checked and displayed in Fluid user interface.
Browse Course Catalog Options	SSR_CRSCTLG_OPT_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Browse Course Catalog Setup >Browse Course Catalog Options	Configure display settings for the course catalog in PeopleSoft Fluid User Interface.
Browse Course Catalog Filters	SSR_CRSCTLG_FLT_FL	Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Browse Course Catalog Setup >Browse Course Catalog Filters	Configure filters options for the course catalog in PeopleSoft Fluid User Interface.

Setting Up Class Search and Enrollment for Fluid User Interface

Access the Class Search Setup page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Setup).

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Image: Class Search Setup page 1 of 2

This example illustrates the fields and controls on the Class Search Setup page 1 of 2. You can find definitions for the fields and controls later on this page.

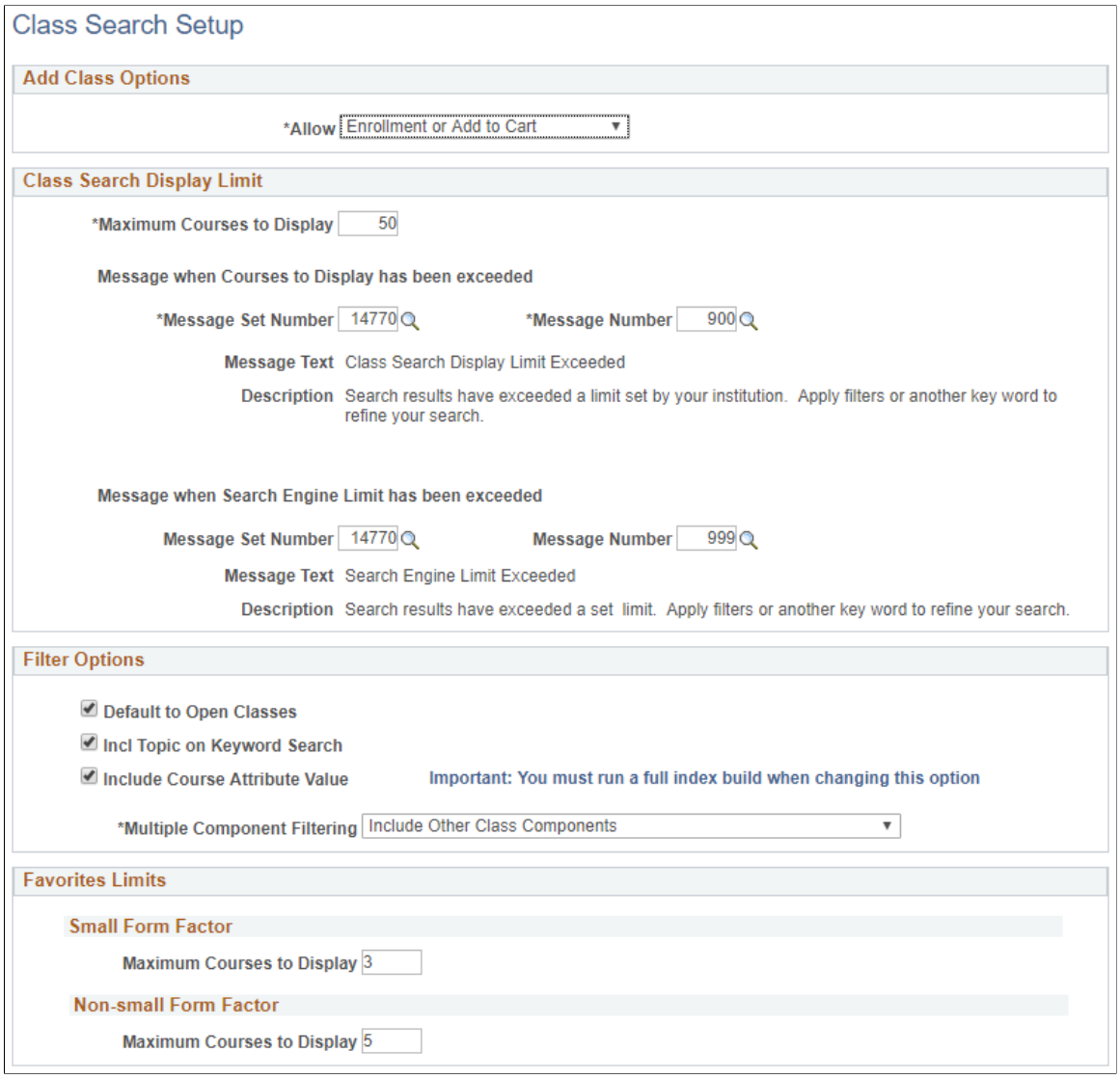

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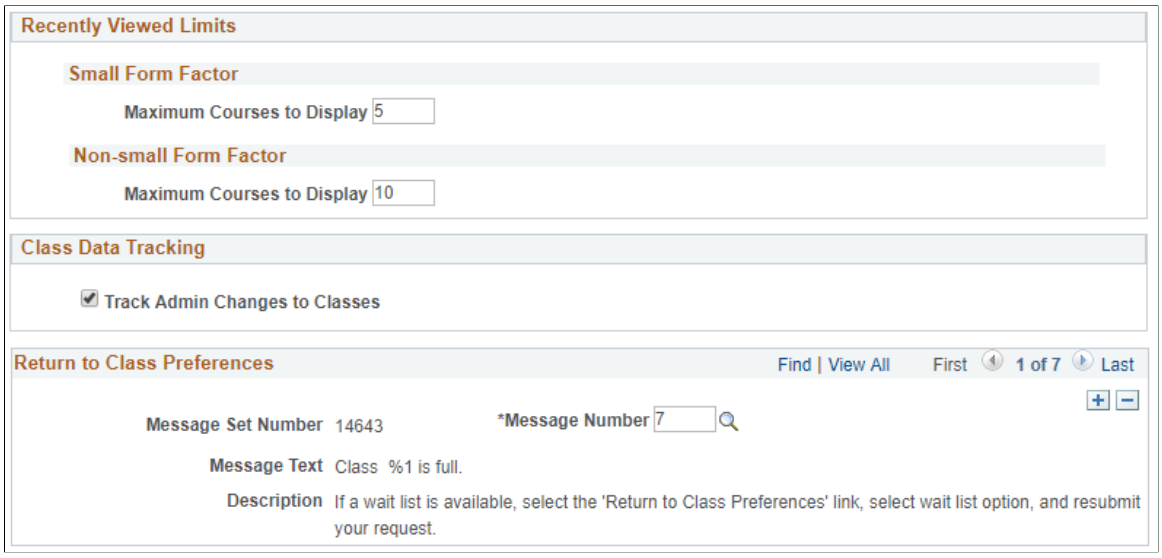
Image: Class Search Setup page 2 of 2

This example illustrates the fields and controls on the Class Search Setup page 2 of 2. You can find definitions for the fields and controls later on this page.



Use the Class Search Setup page to configure the display settings for Class Search and Enrollment in Fluid user interface.

Add Class Options

In this region, you can select:

- *Enrollment Only* to allow students to directly enroll in classes without having to add classes to the shopping cart. When you select this option, the Shopping Cart is disabled and students must enroll directly in the classes selected.
- *Add to Cart Only* so that students always have to add classes to their Shopping Cart before being permitted to enroll.
- *Enrollment or Add to Cart* to allow students to either enroll directly into classes or add classes to their shopping cart. This option is available as part of the Class Search Enrollment Process.

Class Search Display Limit

Use this region to control the number of courses that appear in search results. This number refers to the number of courses that appear on the Fluid user interface and not the number of courses retrieved by the system. Unlike class search in the classic user interface, the search process in Fluid user interface checks *all* class indexes based on the keyword users enter. Although the limit might be set to ‘50’, there may be more results than are shown on the page. Filtering the search results may change the items that appear on the page. The other results that do not appear may show up depending on the filters that are selected. The maximum number of results that can be retrieved is set to 10,000.

Campus Solutions provides a message that is displayed when the class search limit is exceeded. You can change the message in the message catalog to meet your requirements.

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Filter Options

Default to Open Classes

If you select this check box, the open class facet is applied to the search results before the search results are displayed. This ensures that only open classes are retrieved.

Otherwise, all courses or classes are returned regardless of their status. Using filter options makes it possible to select open, waitlisted, or closed courses and classes.

Incl Topic on Keyword Search (Include Topic on Keyword Search)

Select this check box to enable users to search for classes using a course topic. If you do not select this check box, searches using course topics are not possible because the system cannot retrieve results.

Include Course Attribute Value

If you select this check box, attribute names (example: General Education) as well as attribute values (example: General Education: Writing Skills) are displayed as a facet in class search. Otherwise, only the attribute name is displayed as a facet.

Note: When you modify this check box (select or deselect), run a Class Search Index Full Build in order to apply the changes. Running a full build index temporarily prevents search results from appearing as all indexes are rebuilt.
If you want to allow class search to remain in service, then you can apply the changes by running the pre-process and incremental builds. See Building Indexes for Class and Course Search.

Multiple Component Filtering

Select:

- *Include Other Class Components* to configure class search results to display *any* course that includes the component you selected. For example, if you set up your class search definition and include the facet “Lecture,” when students search for classes the results will display any course that contains a Lecture component.
- *Only the Selected Component* to configure class search results to display *only* courses that contain the component you selected. For example, if you include only the facet “Lecture” in your class search definition, when students search for classes the results will display only courses whose component is Lecture. If a course consists of Lecture *and* Laboratory, it does not appear in class search results.

Favorites Limits

Use this region to set the maximum number of favorite courses favorites that can be saved and displayed on small and non-small form factor devices. Once the maximum number is reached, a message is displayed in self-service to indicate that no further favorites can be saved.

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Recently Viewed Limits

Use this region to set the maximum number of recently viewed courses that appear on small and non-small form factor devices. Once the maximum number is reached, the oldest recently viewed course (timewise) is overridden by the next recently viewed course.

Class Data Tracking

Track Admin Changes to Classes Select this check box together with the check boxes Fluid Self Service (on the Student Records Installation page) and Track Admin Changes to Courses (on the Browse Course Catalog Options page) to automatically track changes to courses and classes. These are used to determine what appears in class search and the course catalog in Fluid user interface.

Oracle recommends you select this check box to capture changes to classes. However, you may wish to deselect this check box for a period of time if, for example, you are creating the class schedule for the next or future term and do not want indexes to be created (at this time) for these terms.

See:

- Setting Up Self-Service Features for Student Records
- Configuring Display Settings for the Course Catalog in PeopleSoft Fluid User Interface

Return to Class Preferences

There are circumstances where the enrollment process completes but the student is unable to enroll in classes and may receive an error message from the Enrollment Engine. There are also circumstances where students can return to the enrollment process (for example, when adding a waitlist or permission number) to add the required data to complete the enrollment process successfully.

Use this region to set up a message that, when returned by the Enrollment Engine, adds a link to the confirmation page in Fluid self-service. This link allows the student to return to class preferences during the enrollment process. Campus Solutions pre-populated this region with a few system messages to allow a student to return to the enrollment process. You can remove these messages or add your own system messages to allow students to return to the enrollment process (where it makes sense to do so) to add data and successfully complete the transaction.

Related Links

Configuring Facets

Setting Up Class Filter Options in Fluid User Interface

Access the following pages:

- Class Search Filters – Units page Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Units)

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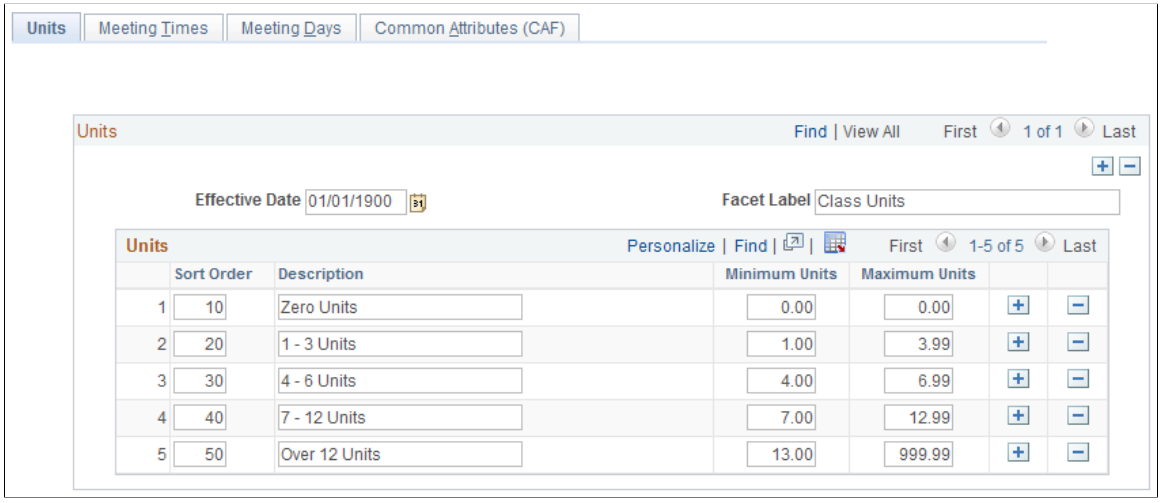
- Class Search Filters – Meeting Times page Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Meeting Times
- Class Search Filters – Meeting Days page Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Meeting Days
- Class Search Filters – Common Attributes (CAF) page Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Search Filters >Common Attributes (CAF)

Note: The values that are delivered in the following pages are only examples. If they are not relevant to your institution, you can change or remove them. These pages should be configured only if you use facets in class search definition.

Image: Class Search Filters - Units page

This example illustrates the fields and controls on the Class Search Filters - Units page. You can find definitions for the fields and controls later on this page.



Sort Order Use this column to set the order in which values appear in Fluid class search results.

Description Specify the value to which a unit is converted and appears as a facet value.

Minimum Units, **Maximum Units** Set the minimum and maximum number of units that are used to validate against if selected in Fluid class search.

Each row on the Units page is converted to a facet value that is used to narrow down the search results in Fluid class search. The value users select is matched against the class unit value.

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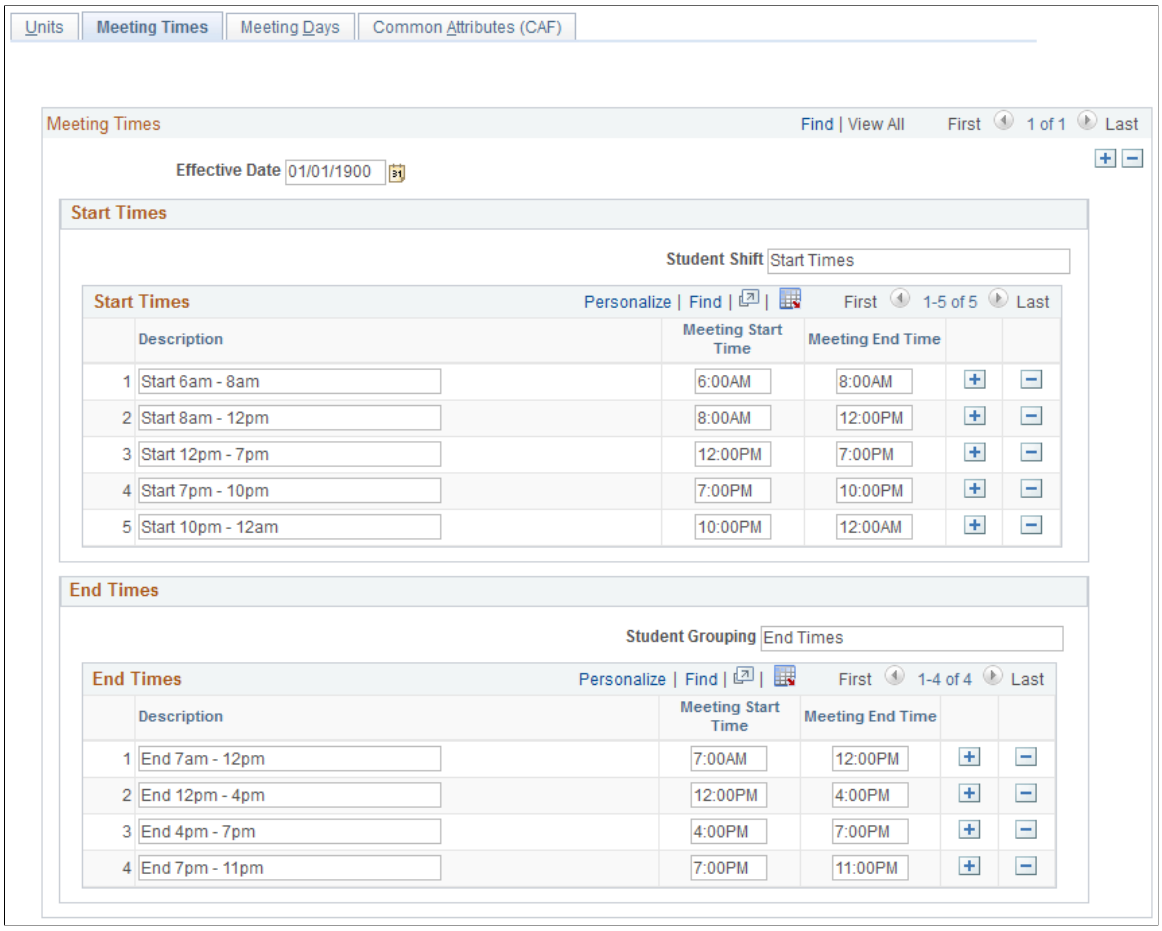
Image: Class Search Filters - Meeting Times page

This example illustrates the fields and controls on the Class Search Filters - Meeting Times page. You can find definitions for the fields and controls later on this page.



Description Specify the value to which the times are converted and appears as a facet value.

Meeting Start Time, **Meeting End Time** Meeting Start and End times are converted into two separate facets that are used to narrow down the search results in Fluid class search. The value users select is matched against the class meeting pattern start and end times. All classes within a class option must meet the facet value to be retrieved.

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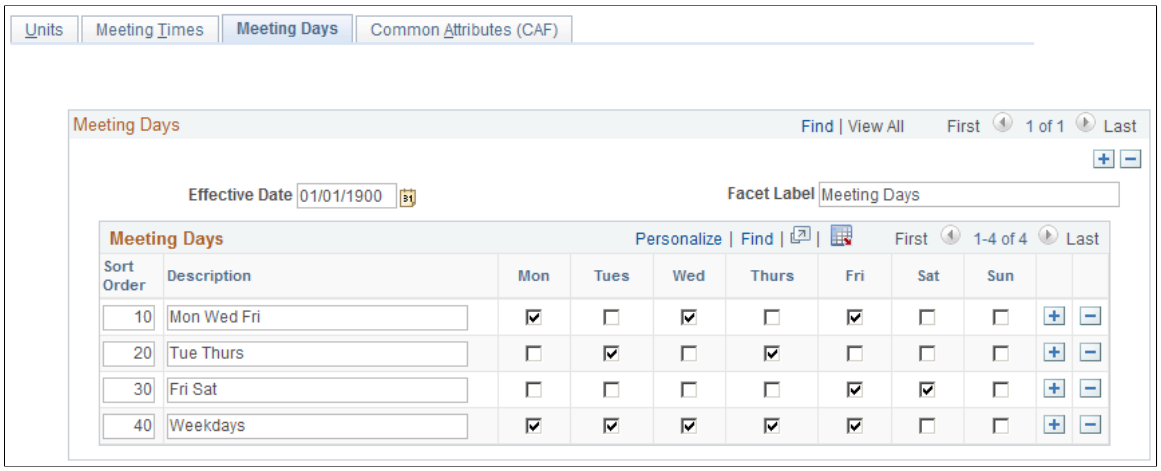
Image: Class Search Filters - Meeting Days page

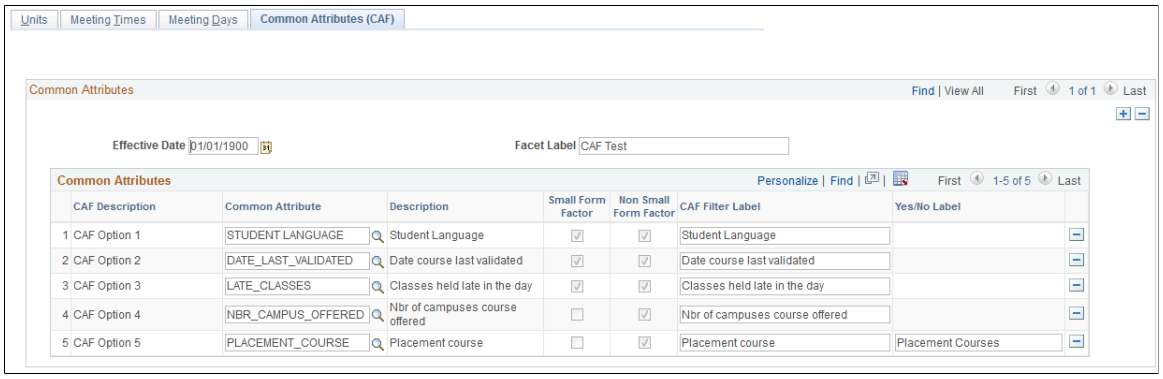
This example illustrates the fields and controls on the Class Search Filters - Meeting Days page. You can find definitions for the fields and controls later on this page.



Each row on the Meeting Days page is converted to a facet value that is used to narrow down the search results in Fluid class search. The value users select is matched against class meeting pattern days. All classes within the class option must meet the facet value to be retrieved.

Image: Class Search Filters - Common Attributes (CAF) page

This example illustrates the fields and controls on the Class Search Filters - Common Attributes (CAF) page. You can find definitions for the fields and controls later on this page.



Campus Solutions delivers this as an empty page. You can use a maximum of five Common Attribute Framework (CAF) records.

Currently, only three CAF records are deployed for small form factor devices, but you can deploy up to five CAF records. Make sure the CAF records you want to use for small form factor devices are added as the top three rows. If your institution requires it, you can use up to five CAF records (or none at all) on the search definition. As CAF records are converted to facets, using text-related CAF is not supported.

See Configuring PeopleSoft Search Framework for Search in Fluid.

Related Links

"Understanding Common Attribute Framework" (PeopleSoft Campus Solutions 9.2: Campus Community)

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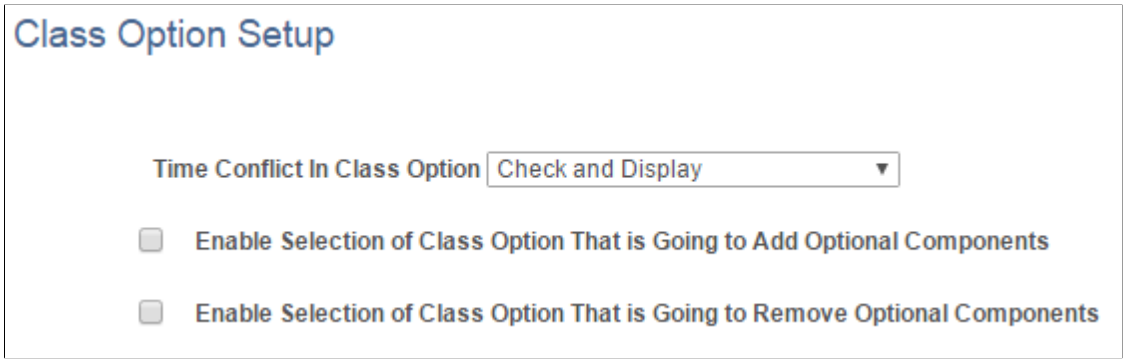
Checking Time Conflicts in Class Options for Fluid User Interface

Access the Class Option Setup page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Class Search Setup >Class Option Setup).

Image: Class Option Setup page

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



Use this page to control whether time conflicts in class option are checked and displayed on the Course Information or Class Selection page.

Time Conflict in Class Option Select:

- *Check and Display* to check if any time conflicts exist and to display the time conflicts in the class options for the Course Information or Class Selection page in Fluid.

  Students are not able to select class options with time conflicts, but are able to see the information.

- *Check and Hide* to check if any time conflicts exist but these conflicts are not displayed in class options.

- *Do not Check* to tell the system not to check for time conflicts.

Note: For class search results, the class status of each component and the number of seats or waitlist places available are dynamically generated as part of the actual class search, and appear in class search results. Because these are dynamically generated, there is no requirement to run any processes to keep this data updated.
For example, when a student performs a class search, aside from checking the class indexes, the system also makes a ‘live’ search in the database to check the class status of each component, number of seats, and waitlist places, and then return this data as part of class selection.

Configuring Display Settings for the Course Catalog in PeopleSoft Fluid User Interface

Access the Browse Course Catalog Options page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Browse Course Catalog Setup >Browse Course Catalog Options).

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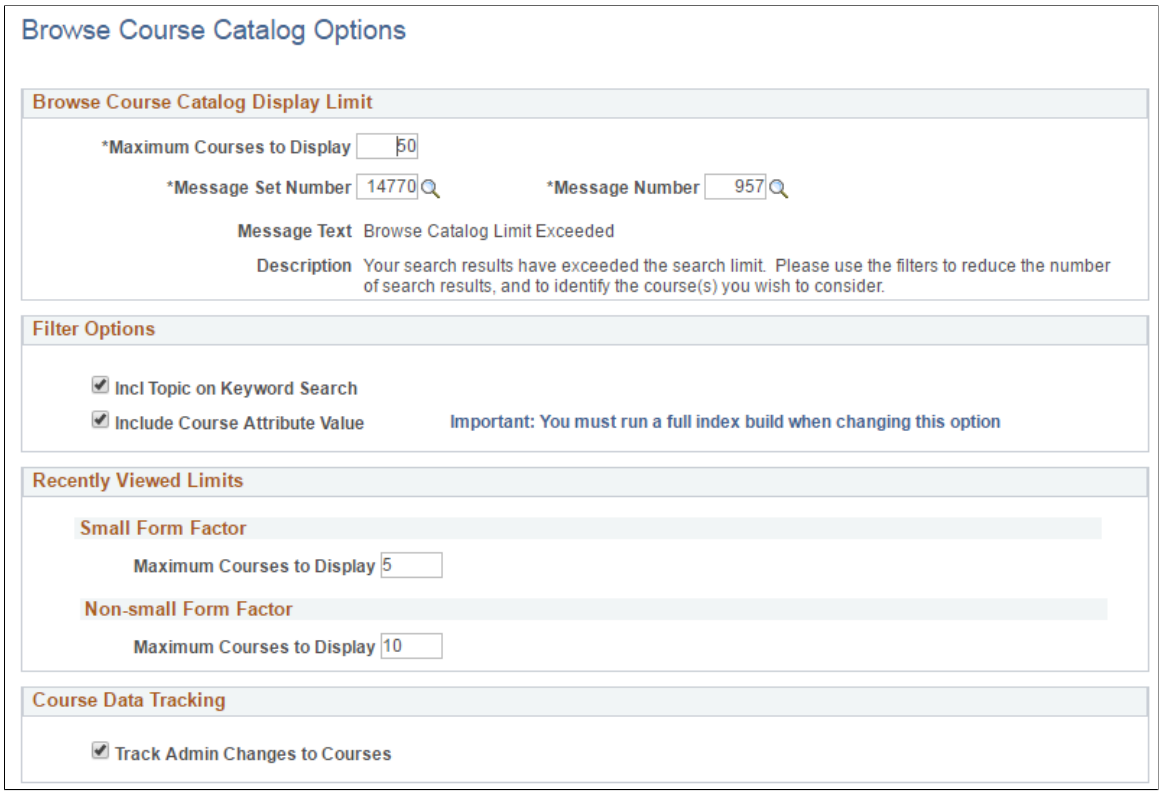
Image: Browse Course Catalog Options page

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



Browse Course Catalog Display Limit

Use this region to control the maximum number of courses that appear in search results. By default, Maximum Courses to Display is set to 50. You can change this value.

Although only the maximum numbers of courses appear, it is likely that there are more than 50 courses in the search results. Filtering the results queries the whole search results data, not just the courses that appear on the page. Oracle recommends that the search limit is kept to a reasonable number to allow the search results to be easily read. The search results can be refined using facets.

Campus Solutions provides a message that is displayed when the course catalog search limit is exceeded. You can change the message in the message catalog to meet your requirements.

Filter Options

Incl Topic on Keyword Search (Include Topic on Keyword Search)
Select this check box to enable users to search for courses using a course topic. If you do not select this check box, searches using course topics are not possible because the system cannot retrieve results.

Include Course Attribute Value
If you select this check box, attribute names (for example, General Education) as well as attribute values (for example, General Education: Writing Skills) are displayed as a facet in

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the course catalog search. Otherwise, only the attribute name is displayed as a facet.

Note: When you modify this check box (select or deselect), run a Browse Course Catalog Index Full Build in order to apply the changes. Running a full build index temporarily prevents search results from appearing as all indexes are rebuilt.
If you want to allow searching in the course catalog to be available, then you can apply the changes by running the pre-process and incremental builds. See Building Indexes for Class and Course Search.

Recently Viewed Limits

Use this region to set the maximum number of recently viewed courses that appear on smartphones, tablets, desktops or laptops. Once the maximum number is reached, the oldest recently viewed course (time-wise) is overridden by the next recently viewed course.

Course Data Tracking

Track Admin Changes to Courses Select this check box together with the check boxes Fluid Self Service (on the Student Records Installation page) and Track Admin Changes to Classes (on the Class Search Setup page) to make sure administrative changes are automatically tracked.

Oracle recommends you select this check box to capture changes to courses.

See:

- Setting Up Self-Service Features for Student Records
- Setting Up Class Search and Enrollment for Fluid User Interface

Configuring Filter Options for the Course Catalog in PeopleSoft Fluid User Interface

Access the Browse Course Catalog Filters page (Set Up SACR > Product Related >Student Records >Fluid Self Service Setup >Browse Course Catalog Setup >Browse Course Catalog Filters).

Note: The values that are delivered in the following page are only examples. If they are not relevant to your institution, you can change or remove them. This page should be configured only if you use the unit facet in browse course catalog search definition.

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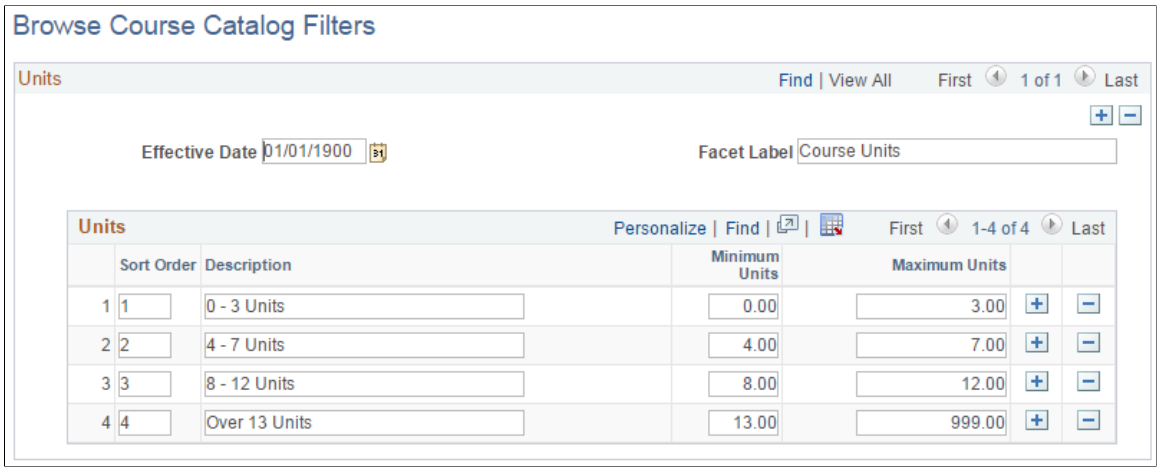
Image: Browse Course Catalog Filters page

This example illustrates the fields and controls on the Browse Course Catalog Filters page. You can find definitions for the fields and controls later on this page.



Sort Order Use this column to set the order in which values appear course catalog search results in PeopleSoft Fluid User Interface.

Description Specify the value to which a unit is converted and appears as a facet value.

Minimum Units, **Maximum Units** Set the minimum and maximum number of units that are used to validate against if selected in Fluid browse course catalog.

Each row on the Units page is converted to a facet value that is used to narrow down the search results when you use PeopleSoft Fluid User Interface. The value users select is matched against the course unit value.

Building Indexes for Class and Course Search

This section discusses how to:

- run full and incremental builds to build the search indexes for classes and courses
- determine when to run maintenance builds
- remove favorites and recently viewed classes from class search
- remove recently viewed course from the course catalog

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Image: Overview of Class Search and Elasticsearch Administrative Process

This diagram is an overview of the administrative processes required to build class search indexes

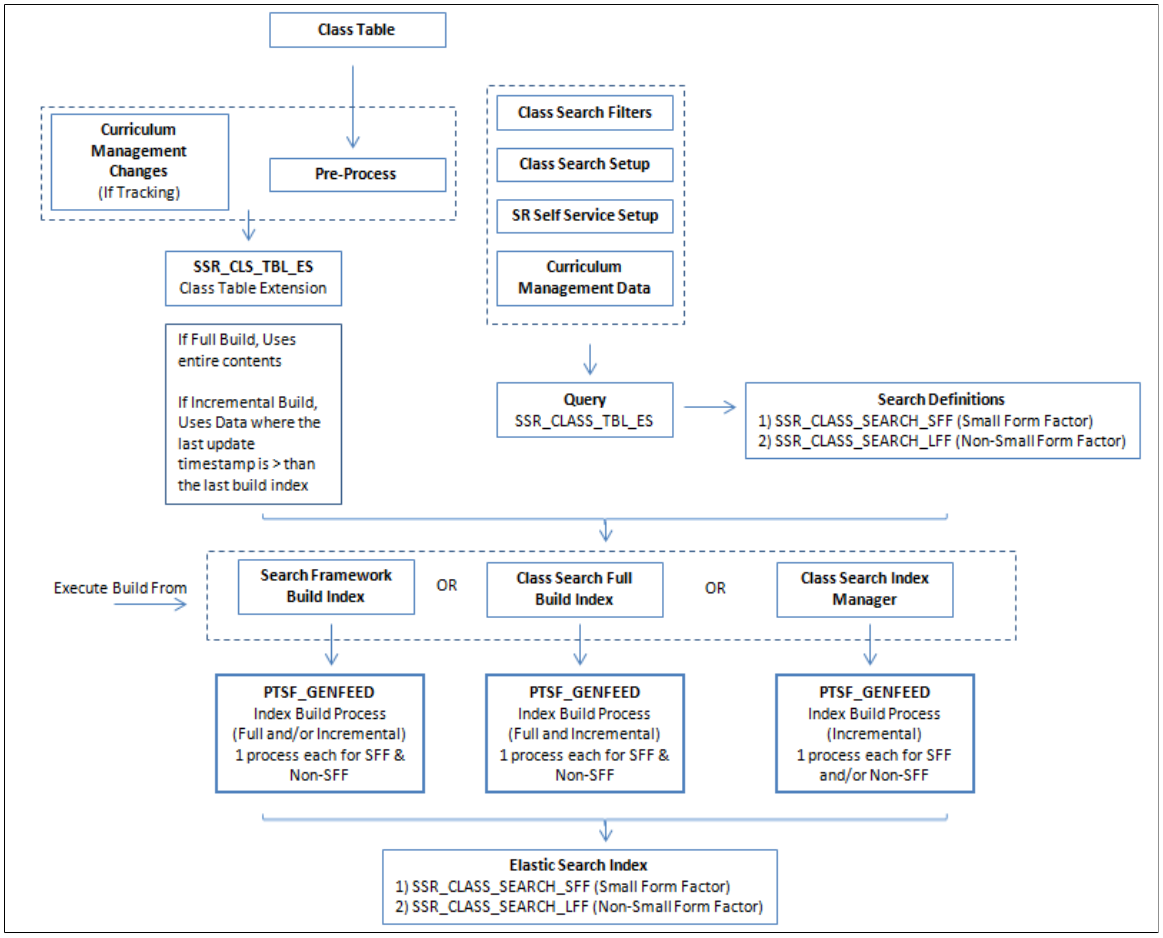

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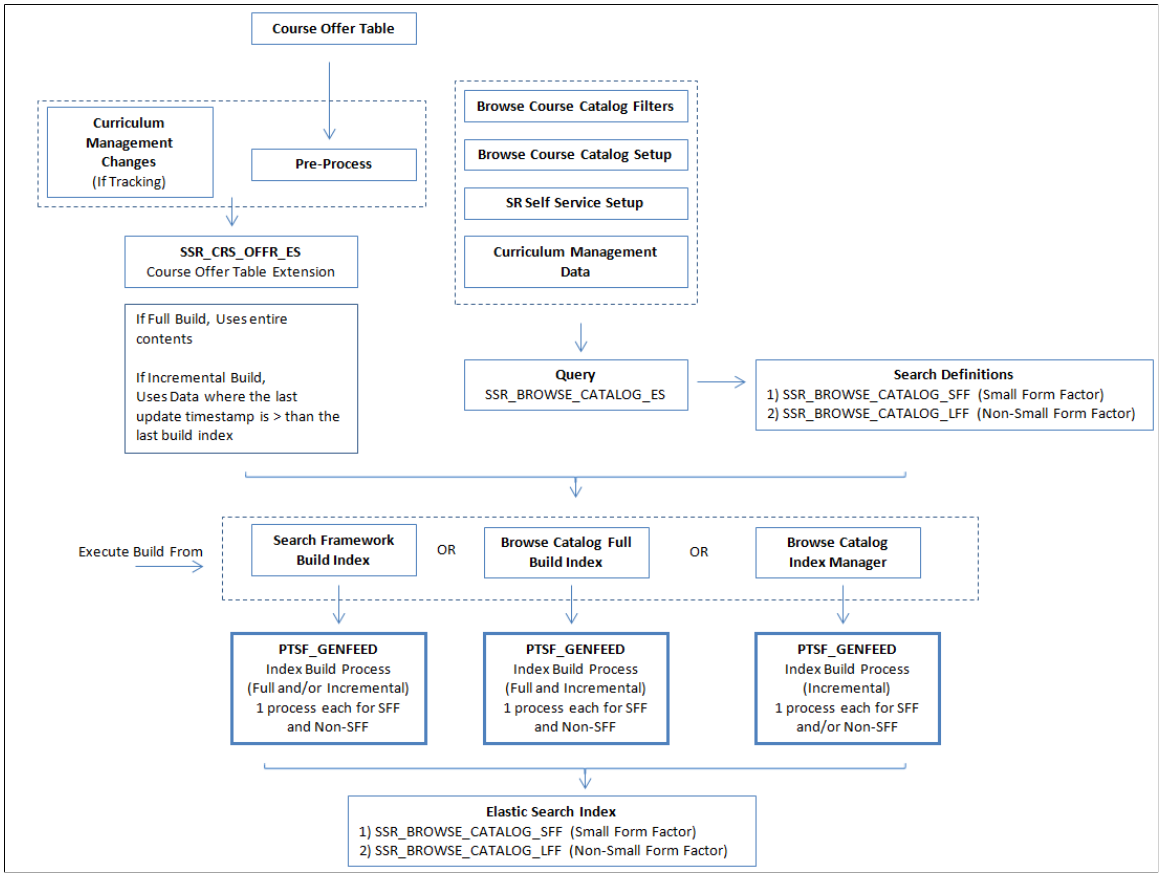
Image: Overview of Course Search and ElasticSearch Administrative Process

This diagram is an overview of the administrative processes required to build course search indexes



Note on Class Search Results

The class status of each component and the number of seats or waiting list available are dynamically generated as part of the actual class search and appear in class search results. Because these are dynamically generated, there is no requirement to run any processes to keep this data updated.

For example, when a student performs a class search, aside from checking the class indexes the system also makes a ‘live’ search in the database to check the class status of each component, number of seats, and waiting list, and then returns this data as part of class selection.

Pages Used to Build the Indexes for Class and Course Search

Page Name	*Definition Name*	*Navigation*	*Usage*
Class Search Index Pre-Processing	SSR_CS_IDX_GEN_FL	Curriculum Management >Fluid Class Search >Class Search Index Pre-Process	Determine which schedule of classes are available in class search.
Class Search Index Full Build	SSR_CS_IDX_FULL_FL	Curriculum Management >Fluid Class Search >Class Search Index Full Build	Run a full index build for small (smartphones) and non-small form factor (tablets, laptops or desktops) devices.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Class Search Index Manager	SSR_CS_IDX_TERM_FL	Curriculum Management >Fluid Class Search >Class Search Index Manager	Run an incremental build.
Purge Class Search Favorites and Recently Viewed	SSR_CS_RVF_PURG_FL	Records and Enrollment >Fluid Class Search >Purge Favs and Recently Viewed	Remove favorites and recently viewed classes from class search.
Course Index Pre-Processing	SSR_BC_IDX_GEN_FL	Curriculum Management >Fluid Browse Course Catalog >Course Index Pre-Processing	Determine which courses are available in the course catalog.
Course Index Full Build	SSR_BC_IDX_FULL_FL	Curriculum Management >Fluid Browse Course Catalog >Course Index Full Build	Run a full index build for small (smartphones) and non-small form factor (tablets, laptops or desktops) devices.
Course Index Manager	SSR_BC_IDX_TERM_FL	Curriculum Management >Fluid Browse Course Catalog >Course Index Manager	Run an incremental build.
Purge Recently Viewed Courses	SSR_BC_RV_PURG_FL	Curriculum Management >Fluid Browse Course Catalog >Purge Recently Viewed Courses	Remove recently viewed courses from the course catalog.

Determining When to Run Build Processes to Maintain the Class Search Index

After you install and implement PeopleSoft Search Framework and Elasticsearch as well as complete the full setup of class search options for Fluid, you must run the Class Search Index Pre-Process and Class Search Index Full Build to build the initial class search index.

The following table indicates the administrative changes that require an index build, and identifies which processes to run. Use the information in this table in conjunction with the succeeding information about maintaining indexes on an ongoing basis. You should be extremely careful when running a full build index—this should be run only during downtime—because search results are not displayed. The pre-process and incremental build can be used in combination during most situations (and does not require class search downtime), except when there are changes to search definitions.

Source of Administrative Changes	*Source Detail*	*Run Class Search Index Full Build?*	*Run Class Search Index Manager (Incremental Build)?*
Class Search Filters	Units, Meeting Days, Start Times, End Times, CAF	Yes, if you do not use Pre-Process	Yes, if you use Pre-Process to identify classes affected by any changes

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Source of Administrative Changes	*Source Detail*	*Run Class Search Index Full Build?*	*Run Class Search Index Manager (Incremental Build)?*
Class Search Setup	Include Course Attribute Value	Yes, if you do not use Pre-Process	Yes, if you use Pre-Process to identify classes affected by any changes
Curriculum Management	Course Catalog, Schedule of Classes	Yes, if you do not use Pre-Process No, if you use *Track Admin Changes to Classes* on the Class Search Setup page.	Yes, if you use Pre-Process to identify classes affected by any changes Yes, if you use *Track Admin Changes to Classes* on the Class Search Setup page.
Pre-Process	Any Action	No	Yes
Student Records Self-Service Setup	Use Waitlisting	Yes, if you do not use Pre-Process	Yes, if you use Pre-Process to identify classes affected by any changes

Oracle recommends that you run the administrative processes from the Curriculum Management >Fluid Class Search menu rather than PeopleSoft Search Framework. Once the initial Class Search Index Pre-Process and Class Search Index Full Build are run, Class Search can be used.

You can maintain class indexes on an ongoing basis, as described below. Enrollment-related class data is handled dynamically as part of class search results.

- When the Track Admin Changes to Classes check box is selected:

  If you select the Track Admin Changes to Classes check box on the Class Search Setup page, any changes to class data is tracked in the class table extension (SSR_CLS_TBL_ES).

  If there are changes to class data and the changes are being tracked, it is *not* required to run the Class Search Index Pre-Process as class data changes are tracked *after* the initial pre-process and full build index. However, you must always run the Class Search Index Manager (incremental build) to ensure that all changes (for example, new classes, and so on) are updated in the class indexes.

  In this sample scenario, upon installation an institution completes all required setup and makes sure the Track Admin Changes to Classes check box is selected. Let us assume that build processes have not been run. The institution implements class search on September 1, 2016. The Fall 2016 – Schedule of Classes has been created prior to September 1. The initial Class Search Index Pre-Process and Class Search Index Full Build are run on September 2, 2016 so that indexes are built for Fall 2016. (More terms can be added to the pre-process if the schedule of classes has been built out by this date.) The Spring 2017 – Schedule of Classes has also been created prior to September 1. However, this term was not included in the pre-process and index builds on September 2. When the institution requires Spring 2017 to be available in class search, you must run the Class Search Index Pre-Process and Class Search Index Manager (incremental build). For Summer 2017, a schedule of classes has not been built as of September 1, 2016. The schedule is built out on September 5, 2016. If Track Admin Changes to Classes has been selected prior to September 5, then the Summer 2017 class indexes can be built using the Class Search Index Manager (incremental build). It is not required to run Class Search Index Pre-Process and Class Search Index Full Build because all changes are being tracked. Changes to the class data for Fall 2016 after the initial processes have been run on September 2 are tracked in the class extension table if this is enabled. The institution can then run the Class Search

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Index Manager (incremental build) to update the class indexes. The institution does not need to run the Class Search Index Pre-Process.

- When changes are made to setup configuration:

  When you make changes to the following setup data, you must run the Class Search Index Full Build:

  - Class Search Filters page: Units, Meeting Days, Meeting Times (start and end times), Common Attribute Framework
  - Class Search Setup page: Filter Options – Include Course Attribute Value
  - Curriculum Management: Course Catalog, Schedule of Classes (only if tracking is not enabled)
  - Enrollment page: Enrollment Features – Use Waitlisting

  When you run the Class Search Index Full Build, all indexes are recreated. Because of this, you should only run Class Search Index Full Build when students are not using class search. Alternatively, you can run Class Search Index Pre-Process *and* Class Search Index Manager (incremental build).

  In this sample scenario, the institution has run the initial Class Search Index Pre-Process and Class Search Index Full Build. The institution then decides to select the Include Course Attribute Value check box on the Class Search Setup page. Instead of running a Class Search Index Full Build, which would recreate all indexes and make class search unavailable, the institution can run Class Search Index Pre-Process and Class Search Index Manager (incremental build).

- When the Track Admin Changes to Classes check box is deselected:

  In most cases, institutions will make sure that the Track Admin Changes to Classes check box is selected on the Class Search Setup page so that all class changes are tracked. Although this check box can be deselected (that is, switched off) or “switched off” for a period of time, it is important to understand what is required if the institution chooses to deselect the Track Admin Changes to Classes check box .

  In this scenario, when adding classes for Fall 2017, the institution might want to deselect the Track Admin Changes to Classes check box because they don’t want classes to appear in class search. (Alternatively, you can hide classes by making the term unavailable in the Term table.) In this situation, the institution can just run the Class Search Index Pre-Process and Class Search Index Manager (incremental build) once they have completed creating class schedules for Fall 2017. However, because the institution deselected the Track Admin Changes to Classes check box, if updates are made to class data for other terms (for example, Spring 2017, or any existing terms that have already been indexed), then the institution must run a Class SearchIndex Pre-Process and Class Search Index Manager (incremental build) for all terms where changes have been made since tracking has been switched off. It would be necessary to manually track all the changes that have been made to know which terms the institution must update using the pre-process and index manager.

  If the institution switched off tracking and there are no changes to class data, then the institution does not need to run any processes. Oracle highly recommends that class changes are tracked, where possible, and that the Track Admin Changes to Classes is selected.

Related Links

Configuring Search Options in PeopleSoft Fluid User Interface

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Determining When to Run Build Processes to Maintain the Course Search Index

The following table indicates the administrative changes that require an index build, and identifies which processes to run. You should be extremely careful when running a full build index—this should be run only during downtime—because search results are not displayed. The pre-process and incremental build can be used in combination during most situations (and does not require class search downtime), except when there are changes to search definitions.

Source of Administrative Changes	*Source Detail*	*Run Class Search Index Full Build?*	*Run Class Search Index Manager (Incremental Build)?*
Browse Course Catalog Filter	Units	Yes	No
Browse Course Catalog Options	Include Course Attribute Value	Yes	No
Curriculum Management	Course Catalog Changes	No, if you use *Track Admin Changes to Courses* on the Browse Course Catalog Options page.	Yes, if you use *Track Admin Changes to Classes* on the Browse Course Catalog Options page.

Related Links

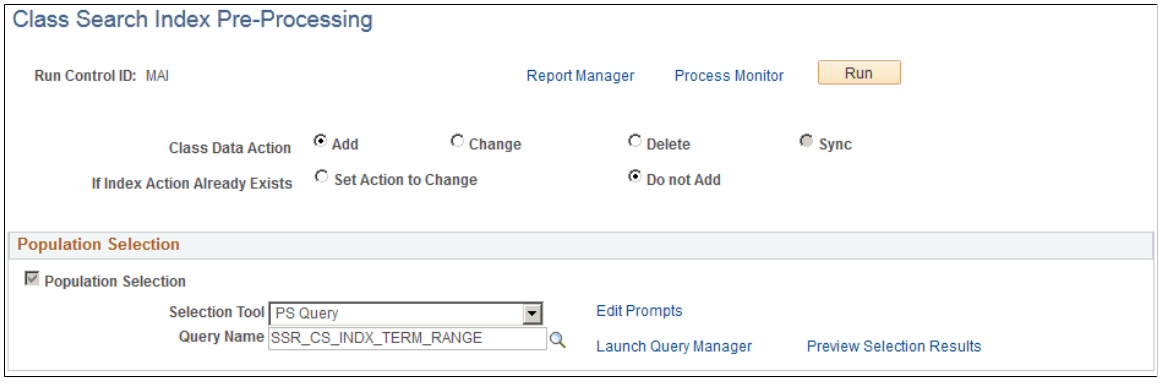
Configuring Search Options in PeopleSoft Fluid User Interface

Running Class Search Index Pre-Processing

Access the Class Search Index Pre-Processing page (Curriculum Management >Fluid Class Search >Class Search Index Pre-Process).

Image: Class Search Index Pre-Processing page

This example illustrates the fields and controls on the Class Search Index Pre-Processing page. You can find definitions for the fields and controls later on this page.



Use this page to determine which schedule of classes are available in class search. Initially, this process should be run to add classes for terms that you want to be available in class search. You can also use this page for ongoing maintenance.

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Add	Select to add new classes to the index. Example: Adding classes for new term
Delete	Select to remove classes from the index. Example: Removing classes from an older term
Change	Select to update classes already indexed. Example: Adding class search filters, changes to class meeting patterns, units, and so on.
Sync	Select to correct classes that are not in the class table but exist in the index, and vice-versa. You can run Sync only when using the query SSR_CS_INDX_BY_TERM_SYNC.

Population Selection

The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool to identify IDs for a specific transaction, you must use it.

Select the Population Selection check box to use the Population Selection process to select the schedule of classes that you want to be available in class search. When you select this check box, the Selection Tool and Query Name fields become available. Oracle recommends you use the delivered queries.

Selection Tool	Select *PS Query*.
Query Name	The following queries are provided: • SSR_CS_INDX_BY_TERM_SESSION: Class Index by Term and Session • SSR_CS_INDX_BY_TERM_SUBJECT: Class Index by Term and Subject • SSR_CS_INDX_BY_TERM_SYNC: Class Index by Term Sync • SSR_CS_INDX_TERM_RANGE: Class Index By Term Range

Running a Full Build for Class Search Index

Access the Class Search Index Full Build page (Curriculum Management >Fluid Class Search >Class Search Index Full Build).

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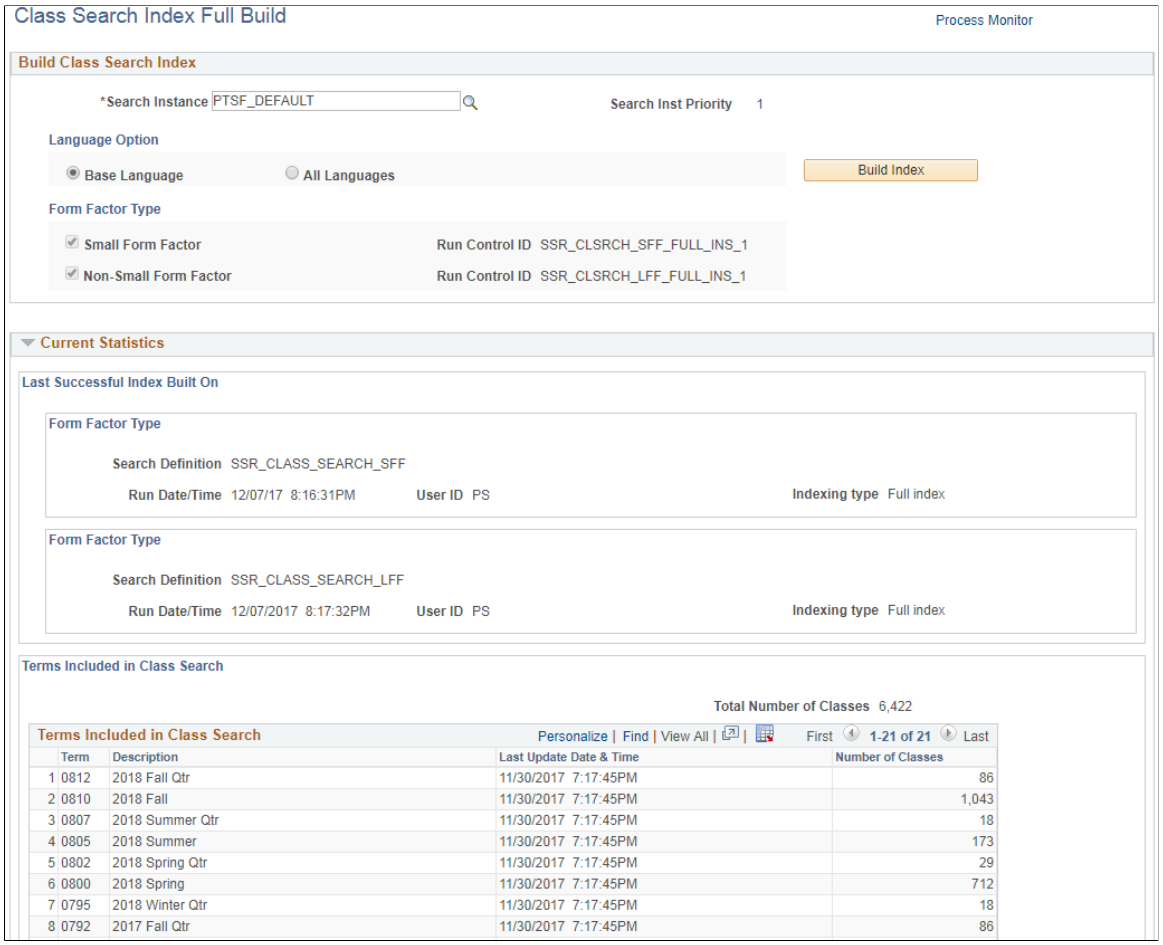
Image: Class Search Index Full Build page

This example illustrates the fields and controls on the Class Search Index Full Build page. You can find definitions for the fields and controls later on this page.



Search Instance Select the search instance you want to use. The run control IDs for the form factor types automatically update to correspond to the search instance you select.

The full build process should be run after the initial implementation of Elasticsearch, PeopleSoft Search Framework search definitions, and setting up class search for Fluid. The process runs for both small and non-small form factor devices. It indicates the terms and number of classes that have had indexes built.

Warning! Running the full index build process prevents self-service class search from displaying search results as all the indexes are rebuilt. Exercise extreme care when running this process. Make sure you run this process only during system downtime or when students do not have access to Class Search. Oracle recommends that a select few users should have access to this process.

You must run a full build if you make any changes (like adding or removing facets) to PeopleSoft Search Framework. The Class Search Index Full Build page allows you to submit a full build for small and large form factor devices. Alternatively, you can also submit a full build using the Schedule Search Index (PeopleTools >Search Framework >Administration >Schedule Search Index).

If you do not want to run a full build, add or remove delivered facets using the Search Category page. See Configuring PeopleSoft Search Framework for Search in Fluid.

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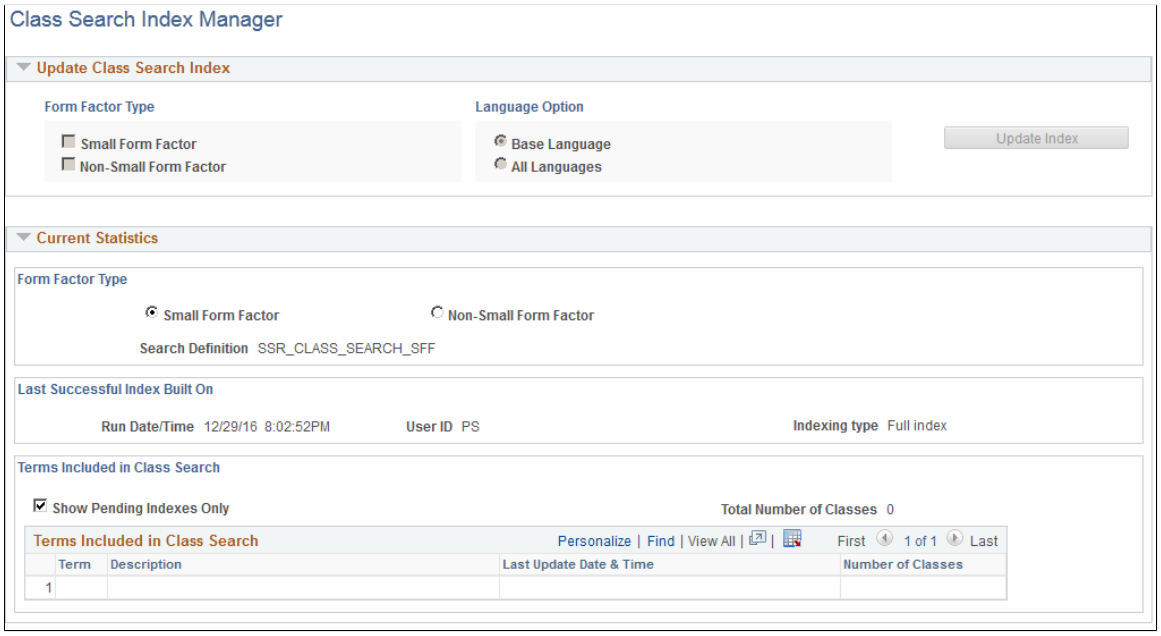
See Also *PeopleTools: Search Technology*, Administering PeopleSoft Search Framework.

Running an Incremental Build for Class Search Index

Access the Class Search Index Manager page (Curriculum Management >Fluid Class Search >Class Search Index Manager).

Image: Class Search Index Manager

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



Use the Class Search Index Manager page to manually trigger an incremental build. The process indicates which class changes are to be made. This page displays pending classes that require an incremental build, and allows the submission of an incremental build process. The incremental build process does not prevent class search results from being displayed as not every index is rebuilt.

Removing Favorites and Recently Viewed Classes from Class Search

Access the Purge Class Search Favorites and Recently Viewed page (Records and Enrollment >Fluid Class Search >Purge Favs and Recently Viewed.

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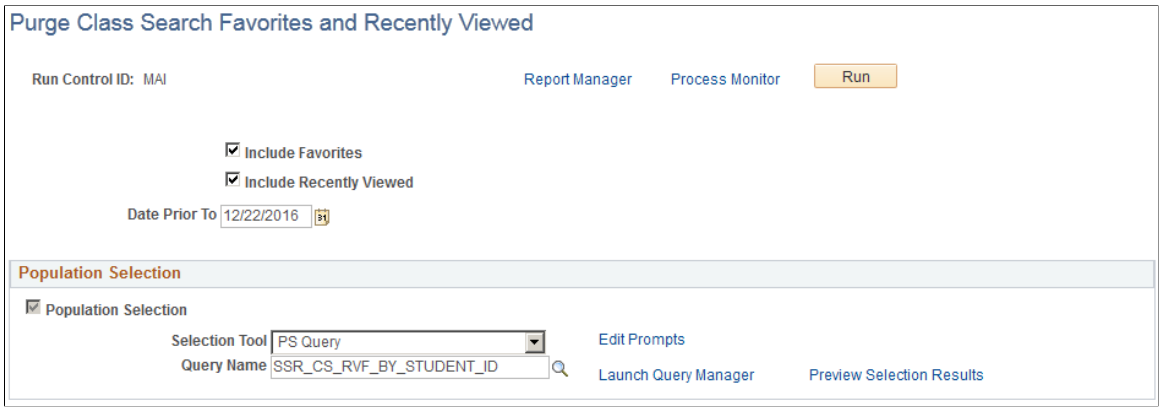
Image: Purge Class Search Favorites and Recently Viewed

This example illustrates the fields and controls on the Purge Class Search Favorites and Recently Viewed. You can find definitions for the fields and controls later on this page.



Use this page to remove either favorites or recently viewed classes—or both—from class search. Because favorites and recently viewed classes are term-specific, you normally run this process at the end of the term.

Date Prior To Select to define the date when data should be removed.

Campus Solutions provides the following queries:

Population Selection

The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool to identify IDs for a specific transaction, you must use it.

Select the Population Selection check box to use the Population Selection process to select the favorites and recently viewed classes that you want to purge. When you select this check box, the Selection Tool and Query Name fields become available.

Selection Tool Select *PS Query*.

Query Name The following queries are provided:

- SSR_CS_RVF_BY_STUDENT_ID: Purge Student CS by Student ID
- SSR_CS_RVF_BY_TERM_RANGE: Purge Student CS by Term

Running Course Search Index Pre-Processing

Access the Course Index Pre-Processing page (Curriculum Management >Fluid Browse Course Catalog >Course Index Pre-Processing).

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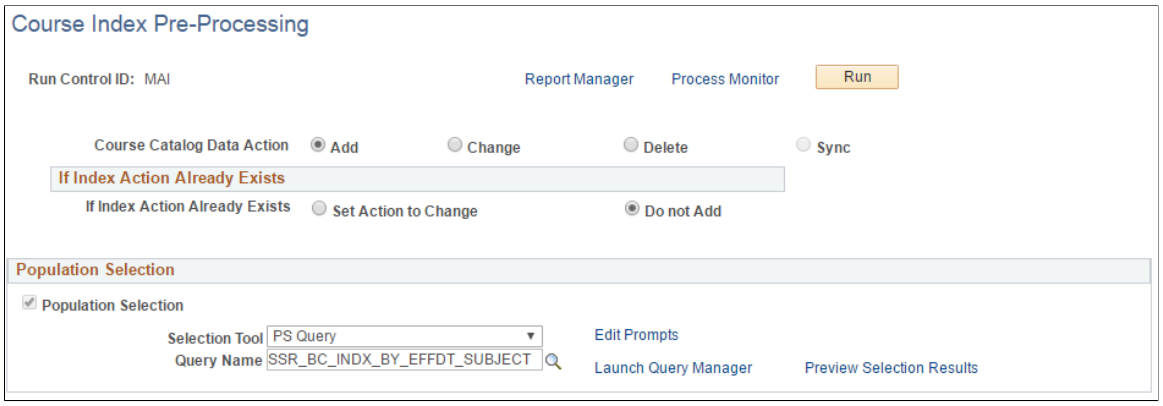
Image: Course Index Pre-Processing page

This example illustrates the fields and controls on the Course Index Pre-Processing page. You can find definitions for the fields and controls later on this page.



Use this page to determine which courses appear in the course catalog. Initially, you run this process to make courses available for search in the course catalog. You can also use this page for ongoing maintenance.

Add	Select to add new courses to the index. Example: Adding course for new subject
Delete	Select to remove courses from the index. Example: Removing courses from a subject that is no longer offered
Change	Select to update courses already indexed. Example: Adding course search filters, changes to courses typically offered, units, and so on
Sync	Select to correct courses that are not in the course table but exist in the index, and vice-versa. You can run Sync only when using the query SSR_BC_INDX_BY_EFFDT_SYNC.

Population Selection

The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool to identify IDs for a specific transaction, you must use it.

Select the Population Selection check box to use the Population Selection process to select the courses that you want to be available in the course catalog search. When you select this check box, the Selection Tool and Query Name fields become available. Oracle recommends you use the delivered queries.

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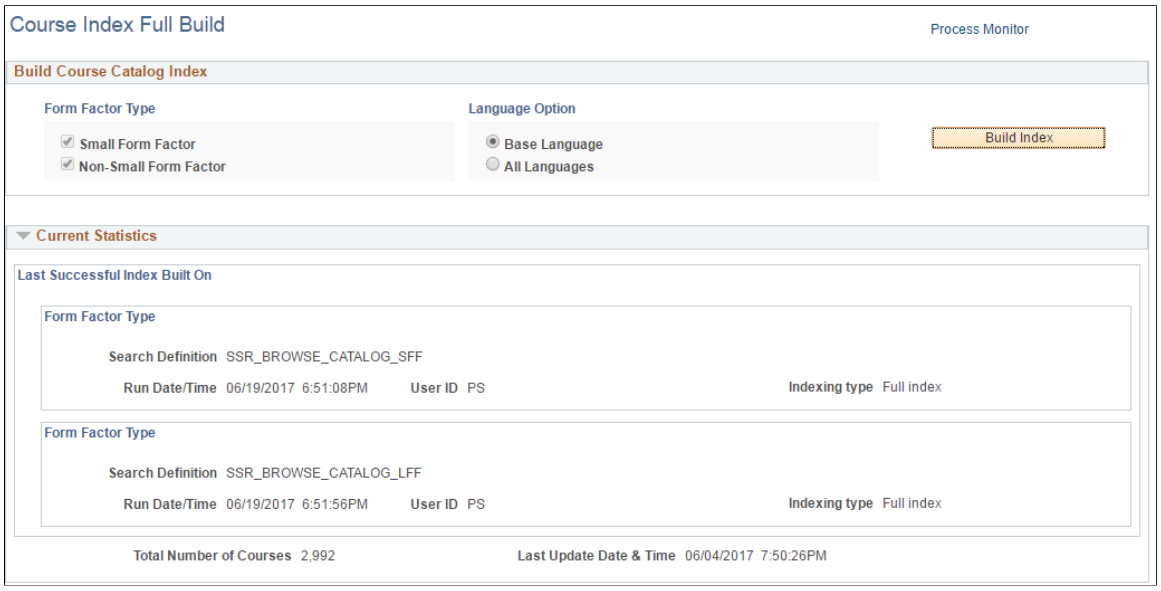
Selection Tool	Select *PS Query*.
Query Name	The following queries are provided: • SSR_BC_INDX_BY_EFFDT: Course Catalog Index by Effective Date • SSR_BC_INDX_BY_EFFDT_CAREER: Course Catalog Index by Career • SSR_BC_INDX_BY_EFFDT_SYNC: Course Catalog by Effective Date Sync • SSR_BC_INDX_BY_EFFDT_SUBJECT: Course Catalog Index By Subject

Running a Full Build for the Course Search Index

Access the Course Index Full Build page (Curriculum Management >Fluid Browse Course Catalog >Course Index Full Build).

Image: Course Index Full Build page

This example illustrates the fields and controls on the Course Index Full Build page. You can find definitions for the fields and controls later on this page.



You should run the full build process after the initial implementation of Elasticsearch, PeopleSoft Search Framework search definition, and configuring display settings for the course catalog in PeopleSoft Fluid User Interface. The process runs for both small and non-small form factor devices. It indicates the number of courses that have had indexes built.

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Important! Running the full index build process prevents the course catalog from displaying search results as all the indexes are being rebuilt. Exercise extreme care when running this process. Make sure you run this process only during system downtime or when students do not have access to course search (Browse Course Catalog).
Oracle recommends that only a select few users have access to this process.

You must run a full build if you make any changes (such as adding or removing facets) to PeopleSoft Search Framework. The Course Index Full Build page allows you to submit a full build for small and non–small form factor devices.

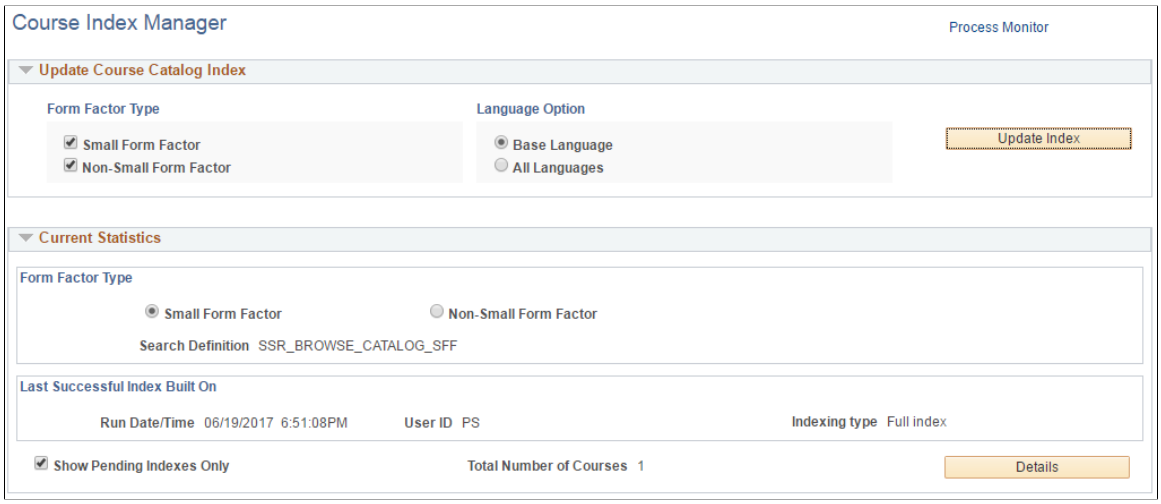
If you do not want to run a full build, you can add or remove delivered facets using the Search Category page. See Configuring PeopleSoft Search Framework for Search in Fluid.

Running an Incremental Build for the Course Search Index

Access the Course Index Manager page (Curriculum Management >Fluid Browse Course Catalog >Course Index Manager).

Image: Course Index Manager page

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



Use the Course Index Manager page to manually trigger an incremental build. The process indicates which course changes are to be made. This page displays pending courses that require an incremental build, and allows the submission of an incremental build process. The incremental build process does not prevent course search results from being displayed as not every index is rebuilt.

Removing Favorites and Recently Viewed Classes from Course Search

Access the Purge Recently Viewed Courses page (Curriculum Management >Fluid Browse Course Catalog >Purge Recently Viewed Courses.

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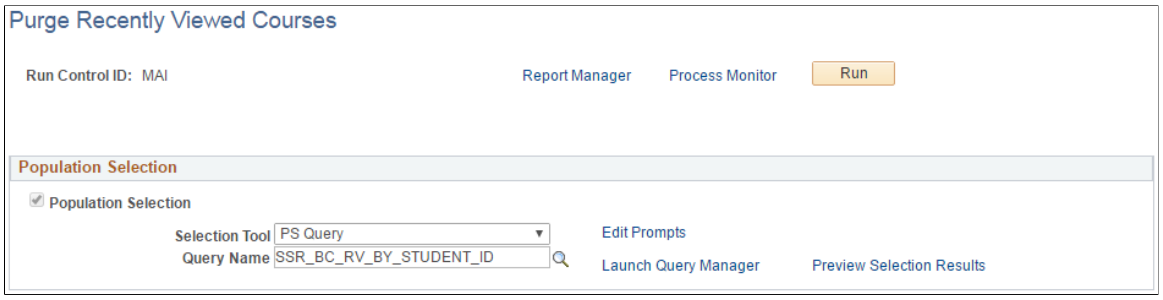
Image: Purge Recently Viewed Courses page

This example illustrates the fields and controls on the Purge Recently Viewed Courses page. You can find definitions for the fields and controls later on this page.



Use this page to remove recently viewed courses from browse course catalog.

Campus Solutions provides the following queries:

Population Selection

The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool to identify IDs for a specific transaction, you must use it.

Select the Population Selection check box to use the Population Selection process to select the favorites and recently viewed classes that you want to purge. When you select this check box, the Selection Tool and Query Name fields become available.

Selection Tool Select *PS Query*.

Query Name The following queries are provided:

- SSR_BC_RV_BY_STUDENT_ID: Purge Student ID
- SSR_BC_RV_BY_INSTITUTION1: Purge by Institution only
- SSR_BC_RV_BY_INSTITUTION: Purge by Student ID and Institution

Scheduling an Incremental Build

To schedule an incremental build that runs automatically in the background:

1. Make sure these check boxes are selected:
   - Fluid Self Service (on the Student Records Installation page). See "Reviewing or Defining Student Records Installation Settings" (PeopleSoft Campus Solutions 9.2: Student Records).

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- Track Admin Changes to Classes (on the Class Search Setup page) and Track Admin Changes to Courses (on the Browse Course Catalog Options page) to automatically track changes to courses and classes. These are used to determine what appears in class search and the course catalog when you use Fluid user interface.

  See Configuring Search Options in PeopleSoft Fluid User Interface.

2. Go to PeopleTools >Process Scheduler >Recurrences, then click Add New Value.

   a. In Recurrence Name, enter a name for your schedule, then click Add.

      The value you assign to Recurrence Name appears in process and job definitions, so it should be readily identifiable.

      The Recurrence Definition page appears.

   b. From the Recurrence Definition page, add the frequency in which to schedule the incremental build.

      If you change class data frequently and you create new classes during the enrollment period, you may wish to schedule an incremental build to run more frequently. If you create classes on the fly during enrollment (for example, you create classes multiple times during the day), you can also use the Class Search Index Manager as this allows you to immediately run the incremental build process.

      For information on the fields and controls on the Recurrence Definition page, see *PeopleTools: Process Scheduler*, Defining PeopleSoft Process Scheduler Support Information, Defining Recurrence Definitions.

   c. Click Save.

3. Go to PeopleTools >Process Scheduler >Jobs, then click Add New Value.

   a. In Process Job Name, enter a value, then click Add.

      The Job Definition page appears.

   b. In Process Category, assign a value.

      Oracle provides these categories: Default and LOADCACHE.

   c. In the Process List region, use these values:

      Process Type = Application Engine

      Process Name = PTSF_GENFEED (Index Search Documents)

   d. Click Job Definition Options.

   e. In Process Groups, select an existing group or add a new class by entering a unique process group.

      A job definition can be a member of multiple process groups. Click + to add new rows.

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Process Groups are assigned in PeopleSoft Security Administrator. This enables you to specify the process requests that classes of users can run. For information on the fields and controls on the Job Definition page, see *PeopleTools: Process Scheduler*, Defining Jobs and Jobsets.

f. Click Save.

4. Go to PeopleTools >Process Scheduler >Schedule JobSet Definitions, then click Add New Value.

   a. In Schedule Name, enter a name for the schedule.

   b. In Job Name, select the value you provided in Process Job Name (step 3a).

   c. Click Add.

      The Schedule JobSet Definition page appears.

   d. In Run Control ID, enter a value.

   e. In Recurrence Name, enter the value you provided in step 2a.

   f. Click Schedule JobSet Items to set up a jobset definition for small and large form factor devices (if you use both and want to create a schedule for both).

   g. For class search, in Run Control ID use: SSR_CLASS_SEARCH_SFF_INCR or SSR_CLASS_SEARCH_LFF_INCR.

   h. For course search, in Run Control ID use: SSR_BROWSE_CATALOG_LFF_INCR or SSR_BROWSE_CATALOG_SFF_INCR.

   i. Click Save.

   j. Click Schedule JobSet Definition.

   k. From the Schedule Information region, in Status, select Active.

   l. Click Save.

   For information on the fields and controls on the Schedule Job Definition page, see *PeopleTools: Process Scheduler*, Defining Jobs and Jobsets, Defining Scheduled JobSets.

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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 in the classic user interface, you must:

- Set up SF business units.
- Establish charge priorities.
- Establish payment overall priorities.
- Define Item Types for Deposit, eCheck, and credit card payments.
- 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 9.2: Student Financials)
- "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.2: 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 9.2: Student Financials).

See *Electronic Payment Integration Developer's Reference Guide* on My Oracle Support (ID 1982664.1).

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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 9.2: Student Financials).

Setting Up Institution Sets

Institution sets are used in self service for classic and Fluid user interfaces.

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.

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.

Understanding Institution Sets

An institution set enables you to define parameters for the PeopleSoft Student Financials self-service pages on classic and Fluid user interfaces, 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 9.2: Student Financials)

"Preparing for User Profiles Management" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Pages Used to Set Up Institution Sets

Page Name	*Definition Name*	*Navigation*	*Usage*
General Options	INSTITUTION_SET_01	Set Up SACR > Common Definitions > Self Service > Student Financials > SF Institution Set > General Options	Define basic institution set parameters.
Electronic Payments	SSF_INST_SET_03	Set Up SACR > Common Definitions > Self Service > Student Financials > SF Institution Set > Electronic Payments	Define parameters of electronic payments.
Institution Set Privacy Policy	SSF_INST_SET_04	Click the Privacy Policy link on the Electronic Payments page.	Define a privacy policy for your institution.
Business Units	INSTITUTION_SET_02	Set Up SACR > Common Definitions > Self Service > Student Financials > SF Institution Set > Business Units	Define business unit parameters.

Defining Basic Institution Set Parameters

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

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.

Note: This is not used in Fluid functionality.

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

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Financial drop-down list in Student Center and whether the link appears at the bottom of the Account Inquiry page.

Note: This is not used in Fluid functionality.

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.

Note: This is not used in Fluid functionality.

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.

Note: This is not used in Fluid functionality.

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.

Note: This is not used in Fluid functionality.

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.

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See "Specifying Tuition Calculation Parameters" (PeopleSoft Campus Solutions 9.2: 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.*

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Manage My Bank Accounts

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

Note: This is not used in Fluid functionality.

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 Installation Table: Settings and Defaults page, 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
- "Selecting General Installation Options" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Note: This is not used in Fluid functionality.

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.

Note: This is not used in Fluid functionality.

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:

Charge	*Date Incurred*	*Amount*
Tuition	July 1, 2006	1,000.00 USD
Fee	September 5, 2006	50.00 USD
Room	November 1, 2006	500.00 USD

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.

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Fluid Options

Use this grid to enable and set up Direct Deposit Enrollment in Fluid user interface.

Direct Deposit Enrollment Select to allow students to enroll in direct deposit using Fluid user interface.

If you select this check box, make sure the following fields are deselected and fields with values should be blank:

- In the Self Service Options grid: Manage My Bank Accounts, Allow Change in Country, Direct Deposit Enrollment
- Manage Bank Options grid and corresponding fields
- Direct Deposit Options grid and corresponding fields
- Manage Banks Service Impact on the Business Units page. See Defining Self-Service Business Units for Institution Sets.

Allow Change in Country Select to allow students to set the country and currency of their bank account using Fluid user interface. Otherwise, the country is derived from the Installation Table: Settings and Defaults page, and the currency is derived from the SF Institution Set setup.

Allow Revocation Select to allow students to delete a bank account that has been set up for direct deposit using Fluid user interface. When you select this, a Revoke Direct Deposit button appears on the Direct Deposit page.

See Managing Financial Accounts Using PeopleSoft Fluid User Interface.

Account Inquiry

The selections made in this group box determine what students see in the Account Inquiry self-service component (SSF_SS_ACCT_SUMM) on classic and Fluid user interfaces. 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.

Note: This is not used in Fluid functionality.

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.

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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 display details of charges by billing invoice ID date.

Note: Display Charge Detail and Display Invoice Due are not used in Fluid functionality.

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.

Note: This is not used in Fluid functionality.

Display Pending Payments

Select to display the student's pending payments on the following pages:

Account Inquiry - Account Summary tab: What I Owe grid.

Account Inquiry - Payments tab: Pending Payments grid.

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

Note: This is not used for hosted payment.

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 deselected, 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.

Note: This is not used for hosted payment.

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.

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

If this check box is deselected, 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.
- Deselected, the total due amount is not 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 deselected, 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.

Note: This is not used in Fluid functionality.

Manage Bank Options

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

Note: This is not used in Fluid functionality.

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.

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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.

Note: This is not used in Fluid functionality.

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:

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- Using Account Services
- "Understanding Student Financials General Setup" (PeopleSoft Campus Solutions 9.2: Student Financials)
- "Understanding Refunding Setup" (PeopleSoft Campus Solutions 9.2: Student Financials)
- "Understanding Refunds" (PeopleSoft Campus Solutions 9.2: Student Financials)
- AP Direct Deposit Setups UPK

Defining Self-Service ePayments for Institution Sets

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.
A flexible interface supports the processing of credit card and eCheck transactions

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 9.2: Student Financials)
- "Understanding ePayment Transactions" (PeopleSoft Campus Solutions 9.2: Student Financials)
- *Electronic Payment Integration Developer's Reference Guide* in My Oracle Support (ID 1982664.1).

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.

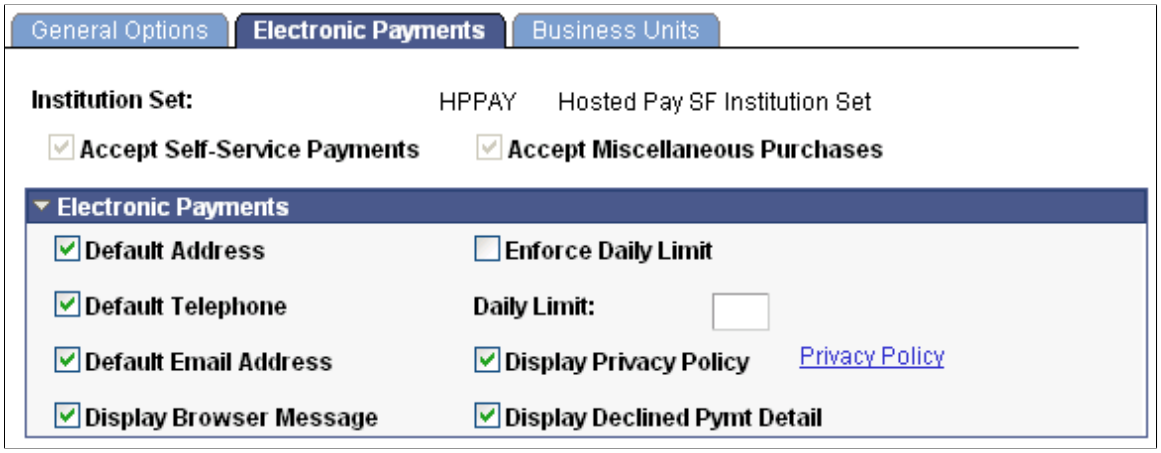

Image: Electronic Payments page (2 of 2)

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.

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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 9.2: 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

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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

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.

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 is not 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.

The Make a Payment page using Fluid user interface always begins with Step 1, Select Payment Method. See Making Electronic Payments.

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 is 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.

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Payment Merchant

The check boxes are selected or deselected 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 9.2: 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.

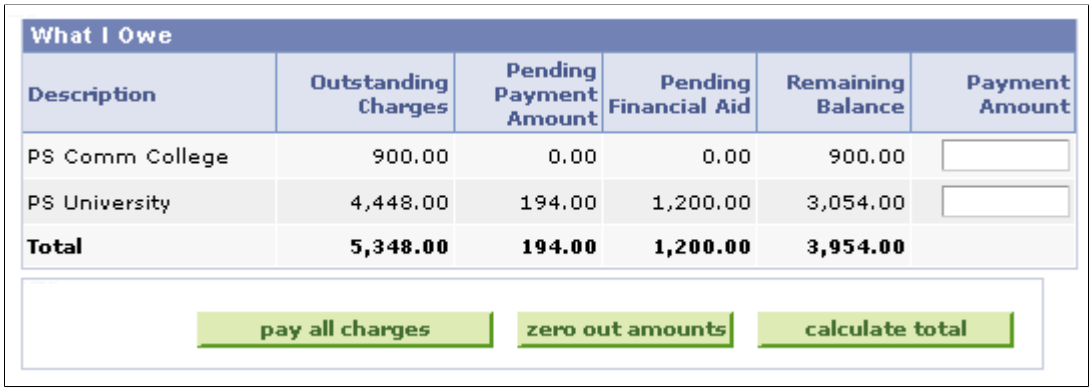
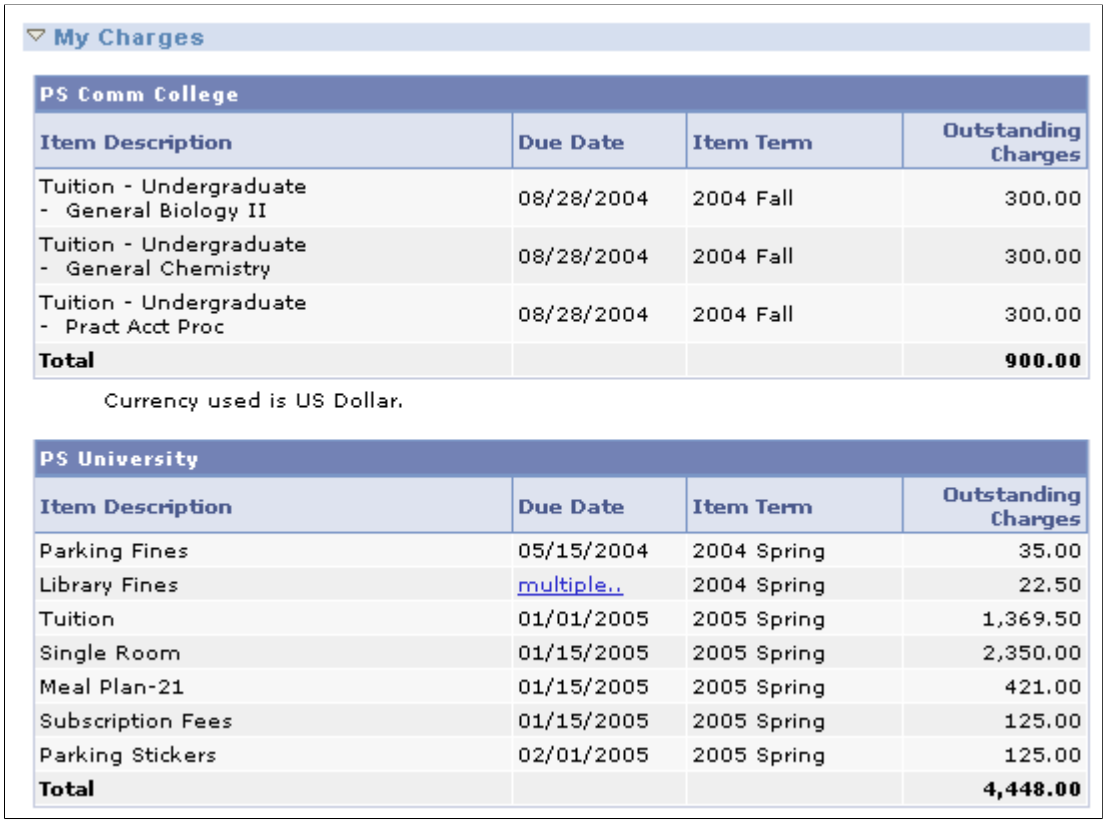


Image: Allocation Level By Business Unit page (2 of 2)

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.



My Charges

PS Comm College

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

Currency used is US Dollar.

PS University

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

Allocation Level by 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.

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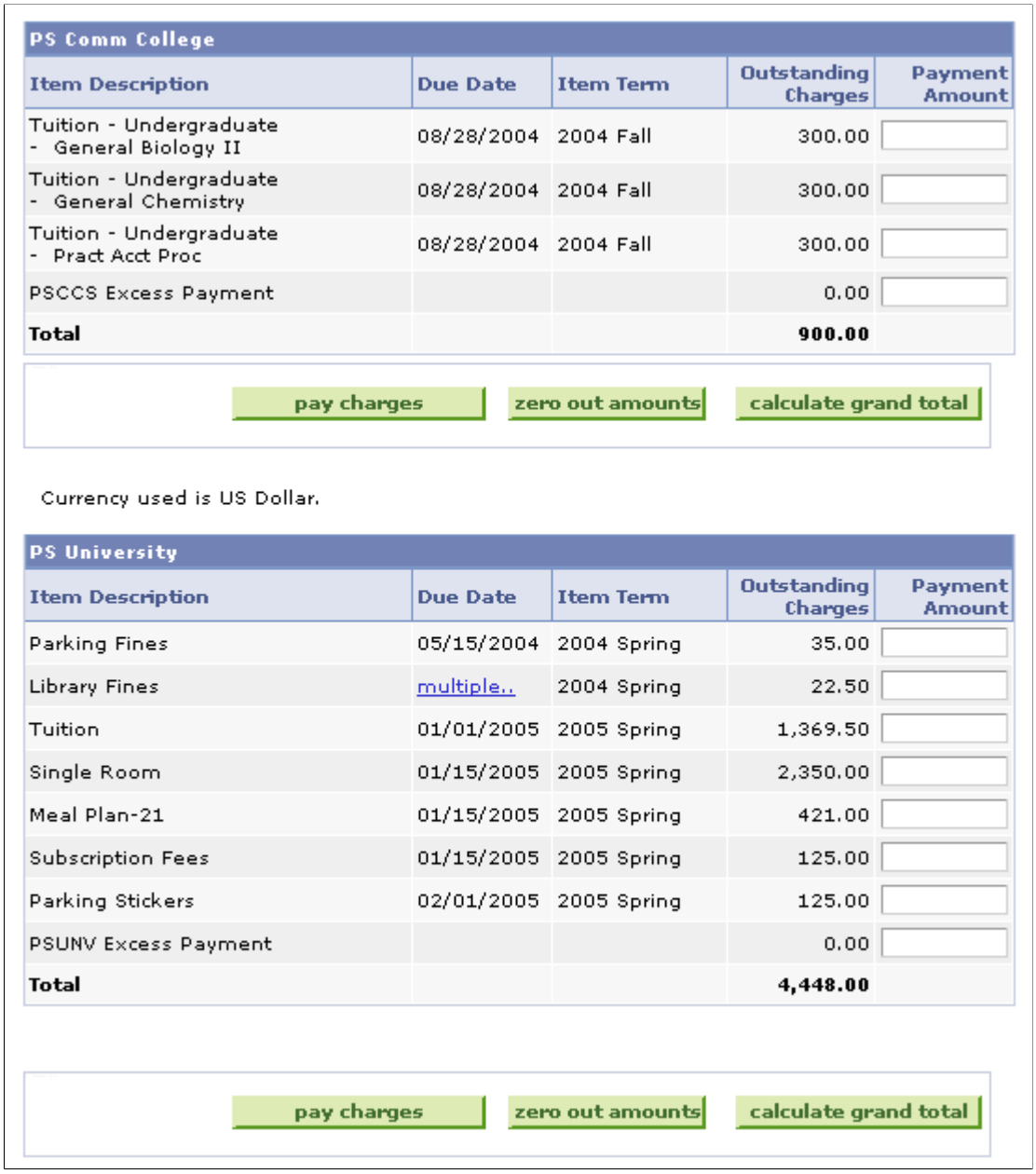
Image: Allocation Level by Charge page (1 of 2)

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.



PS Comm College

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

pay charges | zero out amounts | calculate grand total

Currency used is US Dollar.

PS University

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

pay charges | zero out amounts | calculate grand total

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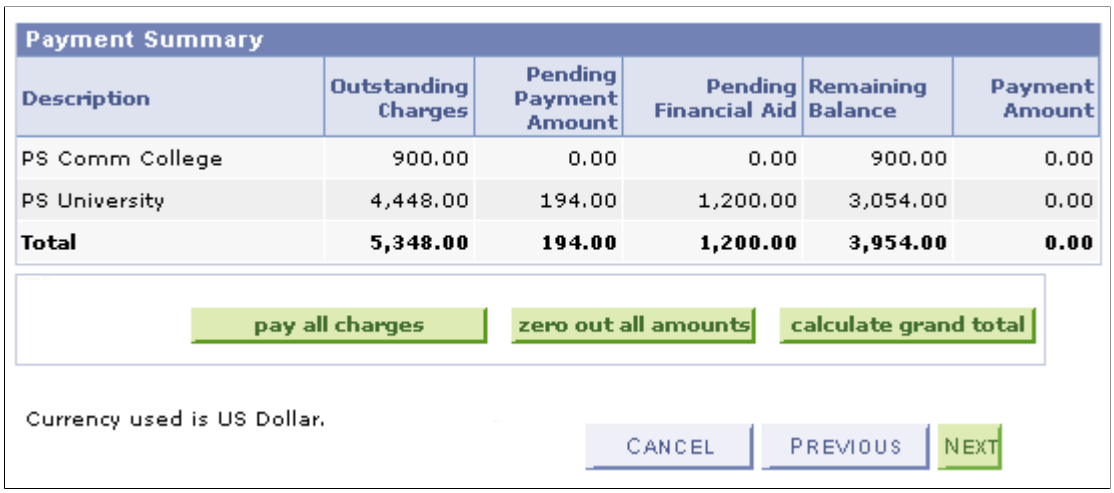
Image: Allocation Level by Charge page (2 of 2)

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.



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 must 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.

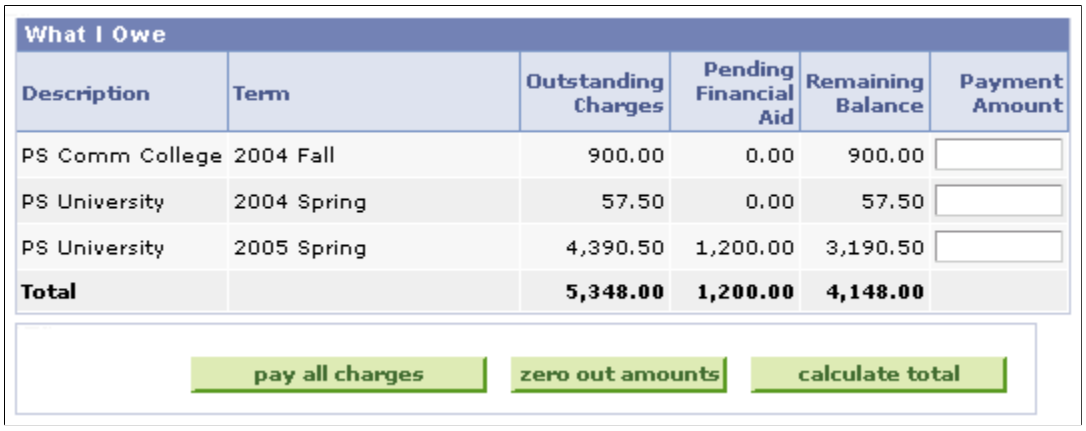


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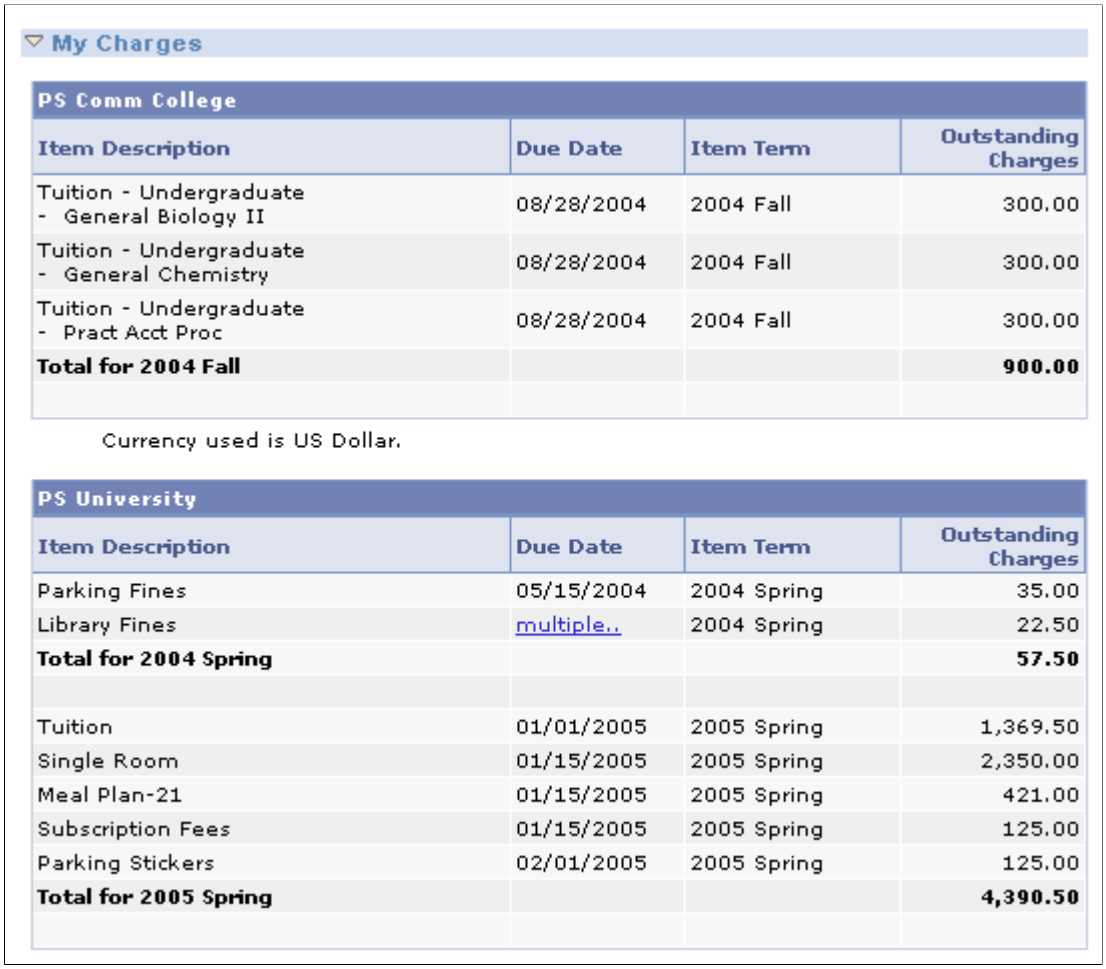
Image: Allocation Level by Term page (2 of 2)

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

PS Comm College

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

Currency used is US Dollar.

PS University

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

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.

Note: This is not used in Fluid functionality.

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.

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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).

Note: This is not used in Fluid functionality.

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).

Note: This is not used in Fluid functionality.

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 is not 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.

Note: This is not used in Fluid functionality.

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

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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.

Note: This is not used in Fluid functionality.

Miscellaneous Fees

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.

Note: This group box is not used in Fluid functionality.

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 are 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.

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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 9.2: 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).

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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.

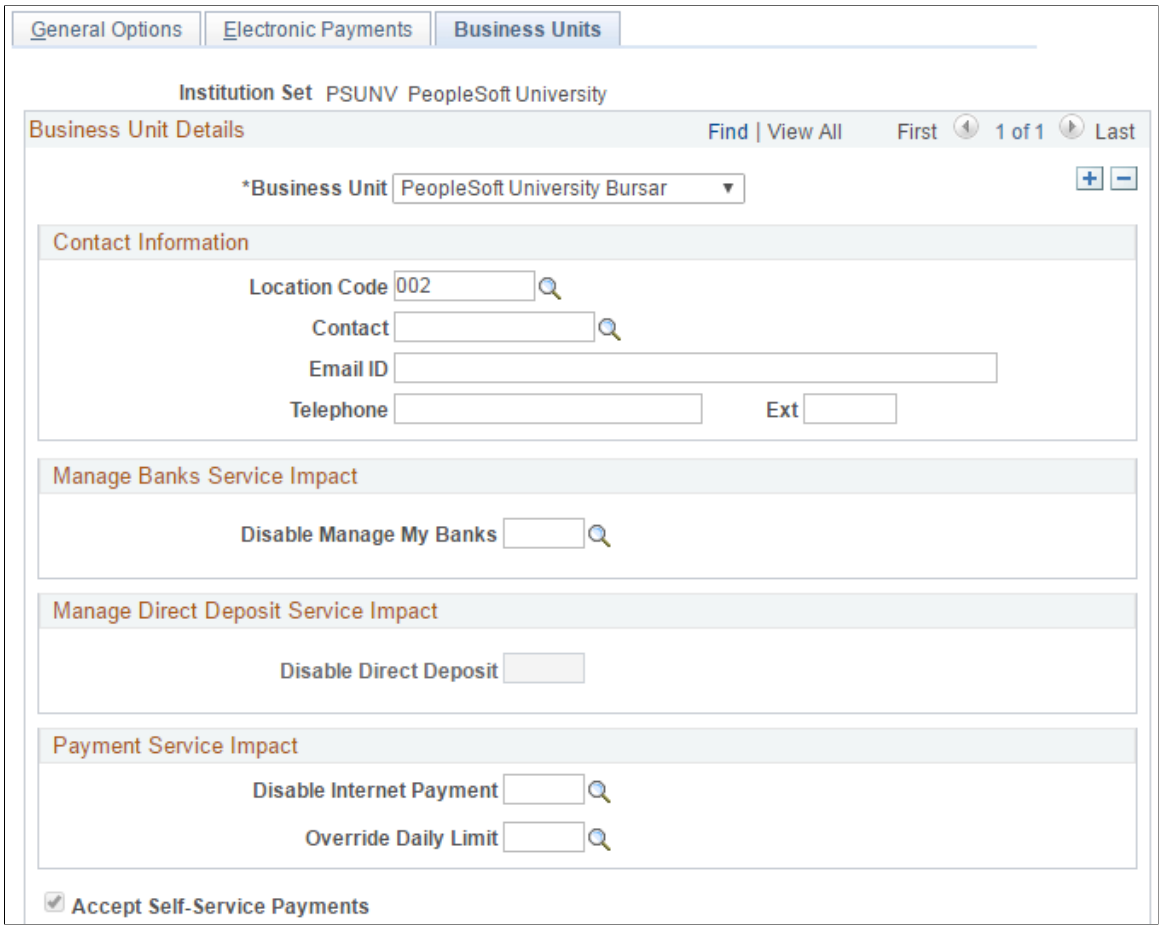

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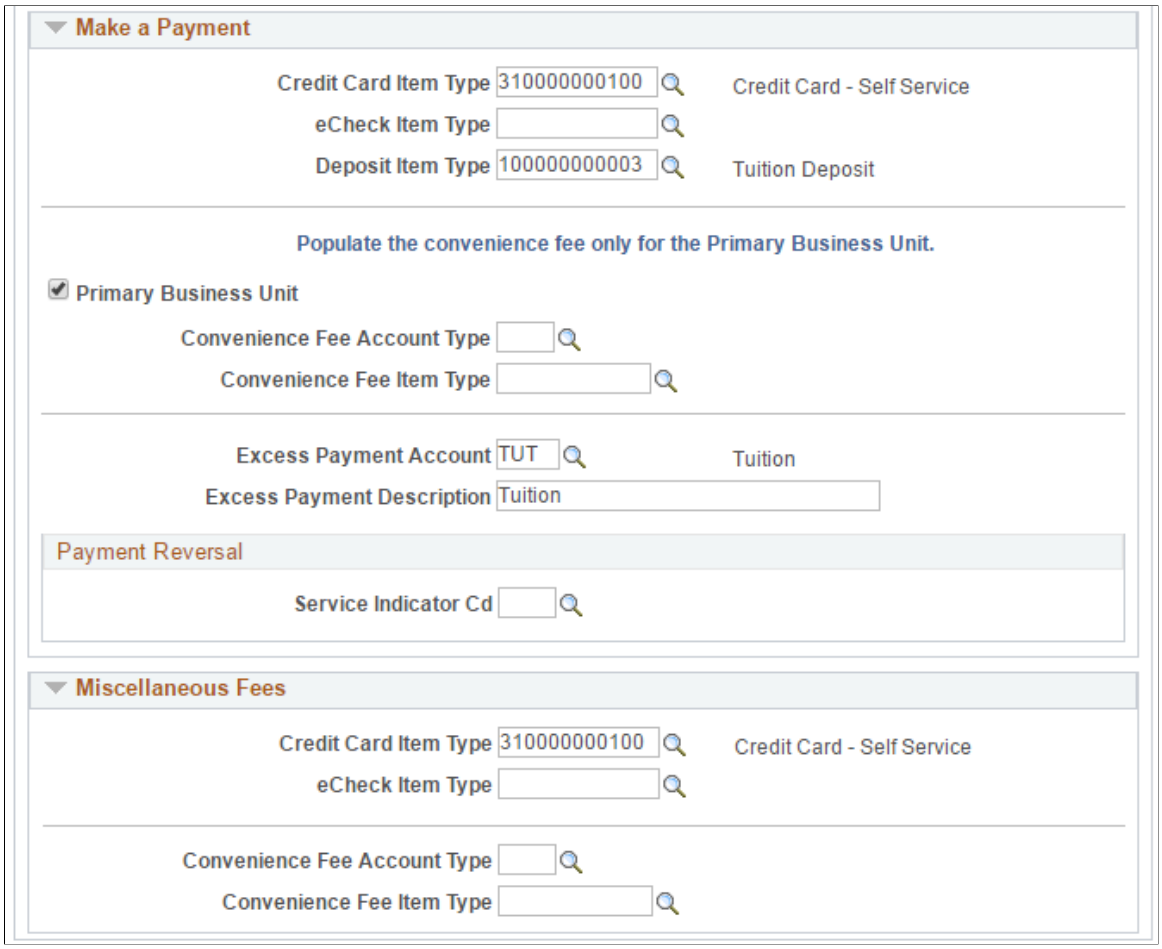
Image: Business Units page (2 of 2)

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.



This page is used for both classic and fluid self service.

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.

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Contact Information

Note: This group box is not used in Fluid functionality.

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

Note: This group box is not used in Fluid functionality. If Direct Deposit Enrollment is enabled for fluid self service, then this grid is disabled.

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.

Manage Direct Deposit Service Impact

Use Disable Direct Deposit service impact to prevent a student from accessing the Direct Deposit page in Fluid self service. This could be a temporary action because of fraud or a similar event.

See Managing Financial Accounts Using PeopleSoft Fluid User Interface.

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 students have this impact on their account, they 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 students have this impact on their account, they can 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

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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 9.2: 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 9.2: 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.

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See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.2: 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.

Note: This group box is not used in Fluid functionality.

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 9.2: 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.

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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 9.2: 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.

See "Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.2: Student Financials).

Setting Up Self-Service Options

This section discusses how to define business unit labels that are used in classic and fluid user interfaces.

Page Used to Set Up Self-Service Options

Page Name	*Definition Name*	*Navigation*	*Usage*
SF Self Service Options	SS_SF_OPTIONS	Set Up SACR > Common Definitions > Self Service > Student Financials > SF Self Service Options	Define business unit labels. The values that you enter here are used in the View By drop-down list boxes and in grids on self-service pages.

Defining Business Unit Labels

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

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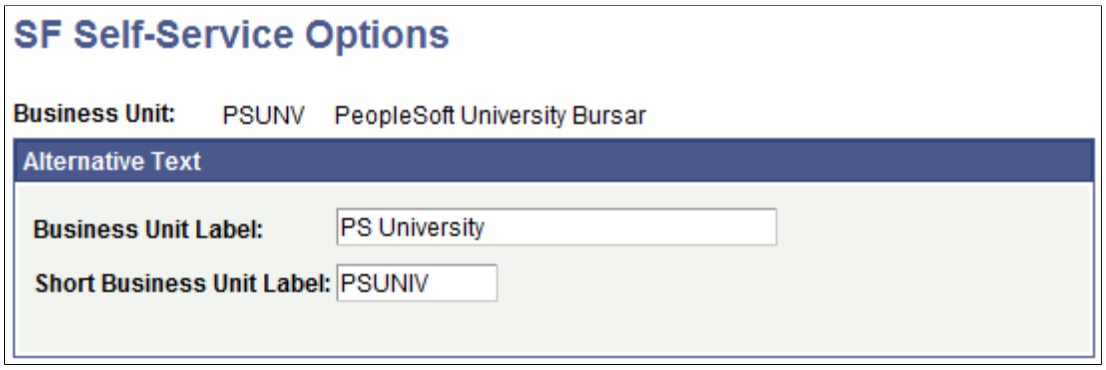
Image: SF Self Service Options page

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.



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 9.2: 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. In the self service classic interface, students can select and purchase items or services, for example, parking or a health plan. The user does not need to be a student (especially for nonterm-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

Page Name	*Definition Name*	*Navigation*	*Usage*
Purchase Category	SSF_PUR_CATEGORY	Set Up SACR > Common Definitions > Self Service > Student Financials > Purchase Category	Set up a purchase category.

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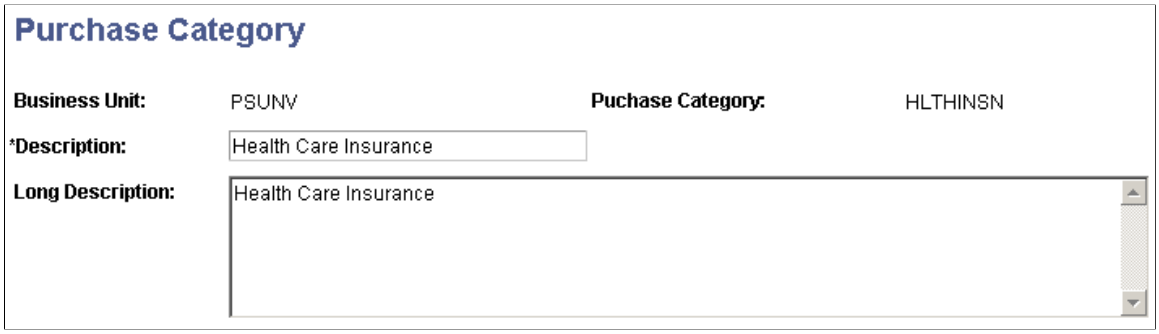
Page Name	*Definition Name*	*Navigation*	*Usage*
Purchase Items	SSF_PUR_ITEM_TBL	Set Up SACR > Common Definitions > Self Service > Student Financials > Purchase Items	Set up fee structure for purchase of miscellaneous items.

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.



Setting Up Purchase Items

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

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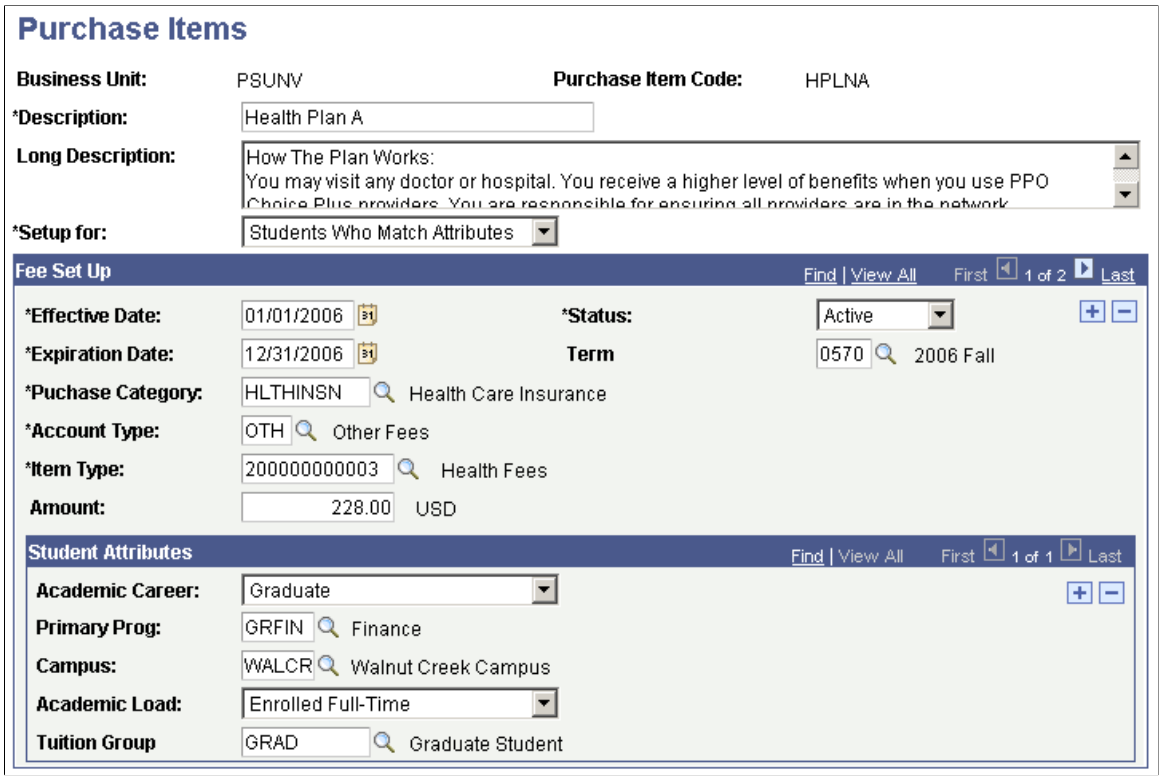
Image: Purchase Items page

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.



Description Enter a description of the purchase item. This appears 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 sees 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.

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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 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)

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- 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.

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Chapter 7

Setting Up Financial Aid Self-Service

Understanding Campus Self Service for Financial Aid

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

Financial Aid Self Service is accessible using classic or PeopleSoft Fluid User interface.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Setting Up Self-Service Inquiry Options

Page Used to Set Up Self-Service Inquiry Options

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

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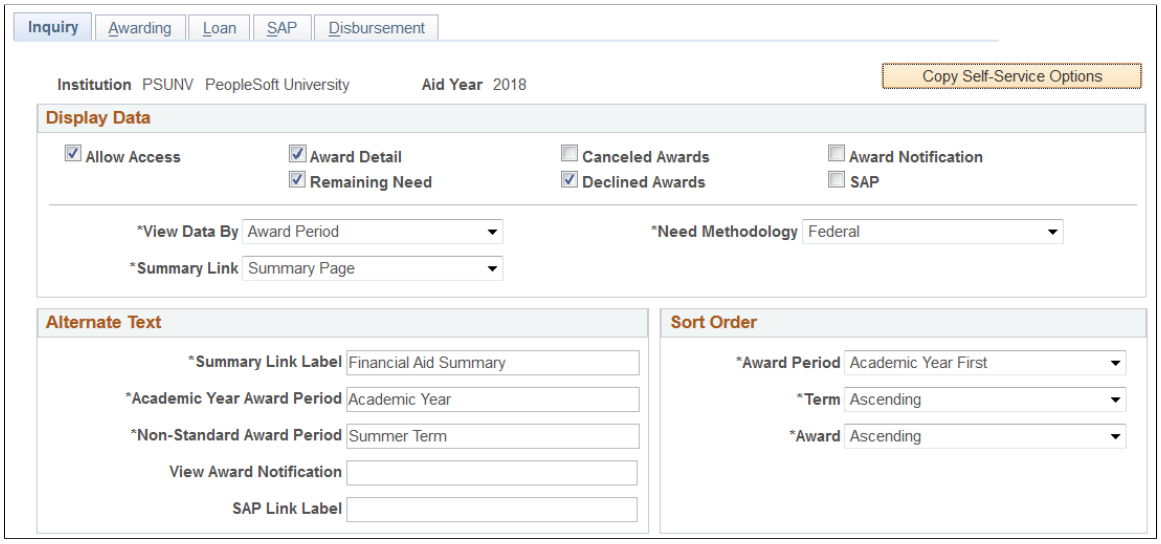
Defining Self-Service Options

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

Image: Inquiry page

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



Use this page to define financial aid elements on classic and fluid interfaces 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 classic and fluid interfaces. 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 Packaging Status Summary 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 Inquiry 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 Self Service Inquiry page, the student can access the self-service award pages. The administrative user can set these fields in batch.

Award Detail

Select to display the Financial Aid Award Summary page for classic and fluid interfaces. If you clear the check box, in the

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	Financial Aid Self Service classic page the student sees the Financial Aid - Self Service Links page.
Remaining Need	Select to display the student's remaining need on the Financial Aid - Financial Aid Eligibility page.
Canceled Awards	Select to display canceled awards. If the student has canceled awards, the system activates the Canceled Awards link on the Award Summary page.
Declined Awards	Select to display declined awards. If the student has declined awards, the system activates the Declined Awards link on the Award Summary page.
Award Notification	Select to display the FE Award Notification PDF link on the student's Financial Aid -Award Summary page and Financial Aid -Award Package page. **Note:** This is not used in fluid functionality.
SAP (Satisfactory Academic Progress)	Select to display a Satisfactory Academic Progress link on the Financial Aid – Award Summary pages. **Note:** This is not used in fluid functionality.
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.

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

Alternate Text

Summary Link Label

Enter a name for this link. The text 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.

Note: This is not used in fluid functionality.

Academic Year Award Period

Enter text such as *Academic Year 2005*. The system displays this text when referring to this specific award period on self-service pages.

Non-Standard Award Period

Enter text such as *Summer*. The system displays this text when referring to this specific award period on self-service pages.

View Award Notification

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.

Note: This is not used in fluid functionality.

SAP Link Label (Satisfactory Academic Progress)

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 *Satisfactory Academic Progress*.

Note: This is not used in fluid functionality.

Sort Order

Award Period

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

Select from:

Academic Year First: Displays academic year data first and then nonstandard period data.

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

Latest Period First: Displays the award period into which the student's most recent term falls. For example, if a student has awards for both Summer 2004 (nonstandard period) and Fall

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2004 (academic year), and these terms are part of the same aid year, then the academic year period is displayed first.

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

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

Term

Select from:

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

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

Award

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

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

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

For the fluid interface, awards are displayed in the same package sequence order as they appear on administrator Awarding pages.

Note: This is not used in fluid functionality.

Copy Self Service Options

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

Related Links

Managing Financial Aid Using PeopleSoft Fluid User Interface

Setting Up Self-Service Awarding Options

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

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Page Used to Set Up Self-Service Awarding Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Awarding	SS_FA_INSTALL2	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options > Awarding	• Define filter options for self-service awarding access criteria. • Set up processing options and Consumer and Entrance Interview URLs. • Define the authentication method and number of required references for the Perkins eMPN. • Enable student access from the Award Inquiry or Accept/Decline pages. • Add instructional text for reporting or viewing.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid > View Packaging Status Summary > Packaging Status Summary	Set access to External Award reporting on student self-service pages.

Defining Self-Service Awarding Options

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

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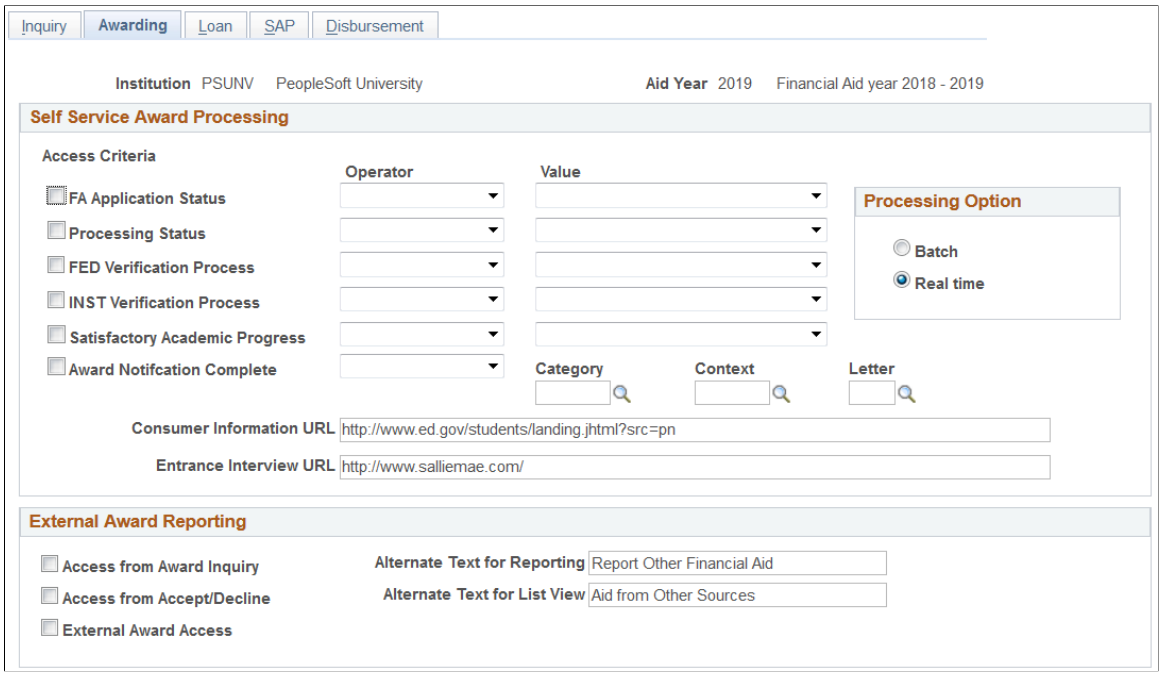
Image: Awarding page

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



Use this page to define access criteria, processing options, and custom URLs for self-service awarding. From this page, you can also define options to allow access to external awards.

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

Self Service Award Processing

Use filters to determine when a student can access the self-service awarding page. Make sure you select the corresponding check box next to the filter to include it in the criteria.

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

FA Application Status (Financial Aid application status) — Select to allow a student access to self-service awarding depending on the application status you specify: Active, Canceled, or Restricted.

Processing Status — Select to allow self-service awarding access based on the student's processing status: Applied, Competed, No App Rcd, Package, or Review.

FED Verification Process (federal verification process) — Select to allow self-service awarding access based on the student's federal verification status: Complete, Nor Reqd, Pending, or Required.

INST Verification Process — Select to allow self-service awarding access based on the student's institutional verification status: Complete or Incomplete.

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Satisfactory Academic Progress Select to allow self-service awarding access if the student meets your institution's criteria for satisfactory academic progress: Meets SAP, Not Meet, Probation, or Undetrmine.

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

Category Select an option:

Appeal: FA Appeals

Award: Financial Aid Award Notification

SAT: Satisfactory Academic Progress Letters

SCHLRS: Scholarship Communications

VERF: Verification Processing

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

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

Consumer Information URL* Enter your institution's student information site. 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. This site may reflect awarding rights and responsibilities such as statement of educational purpose, truth-in-lending content, or other financial aid information.

Note: This field is not used in fluid functionality.

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.

Note: This field is not used in fluid functionality.

Processing Option

This section controls whether students' decisions regarding their awards are processed in real time or by batch.

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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.

Batch

Select to let the system load 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.

By default, this option is selected.

Real time

Select to let the system load 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.

External Award Reporting

Access from Award Inquiry

Select to display a link on the students' Award Inquiry Self Service pages.

Note: This field is not used in Fluid functionality.

Access from Accept/Decline

Select to display a link on the students' Accept Award and Decline Award Self Service pages.

Note: This field is not used in Fluid functionality.

External Award Access

Select to display Outside Aid in the students' Fluid Self Service menu.

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Note: This new option is used for Fluid self service only.

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

Note: This field is not used in Fluid functionality.

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

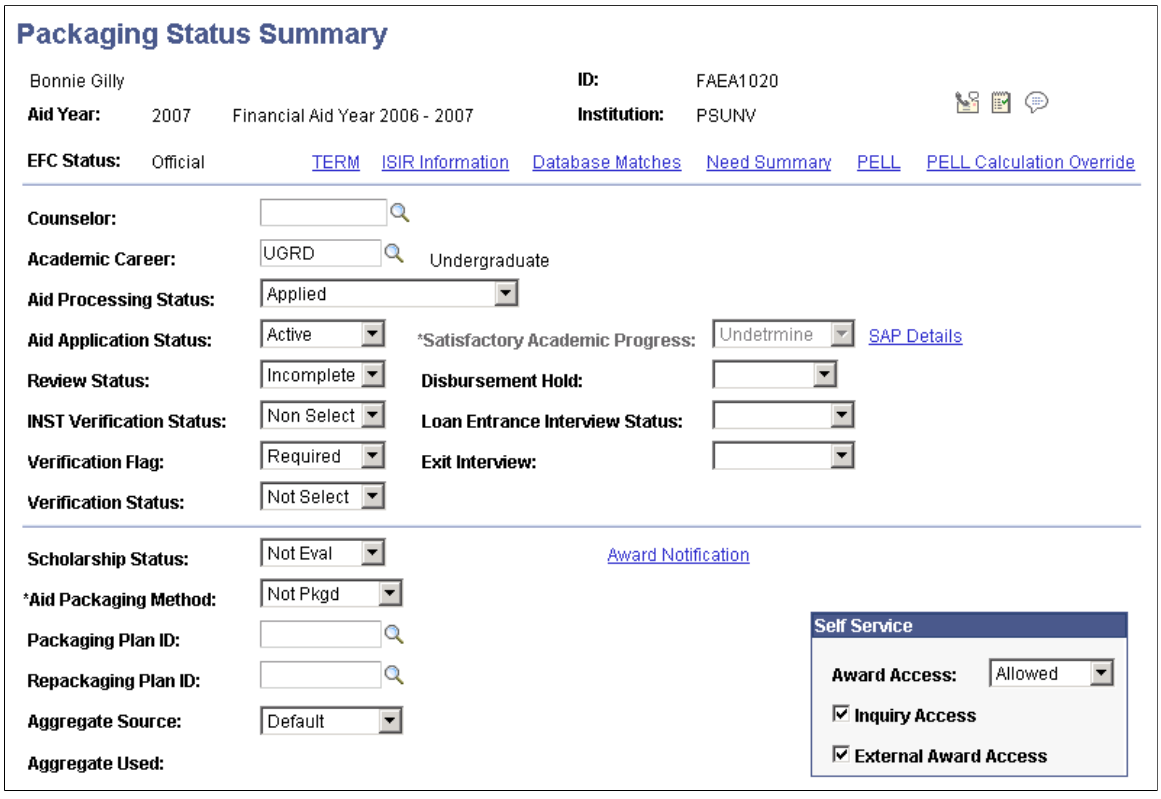
Note: This field is not used in Fluid functionality.

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.



To set access to external award reporting for each student:

Self Service

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

Inquiry Access Select to enable student access to award information.

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

Setting Up FE FAN View and Print Options

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

Page Name	*Definition Name*	*Navigation*	*Usage*
FE Award Notification Defaults	FANLTR_DEFAULTS	Financial Aid > Awards > Notification Letter > Award Notification Defaults	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.
Inquiry Options	SS_FA_INSTALL	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options > Inquiry Options	Select the Award Notification check box in the Display Data group box to display the FE Award Notification PDF link on the students' Award Summary and Award Detail pages. Enter a name for the link to the FE Award Notification PDF process in the View Award Notification field in the Alternate Text group box.
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types > FA Item Type 3	Select *Print* from the Print Letter Option drop-down list box.

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Setting Up Loan Options

Note: These settings are not used to set up fluid functionality.

This section discusses how to:

- Display lender selection
- Define self-service lenders
- Control the display of loan counselling links
- Define general loan information
- Set up options for eMPN processes

Related Links

"Setting Up Loan Origination for CRC" (PeopleSoft Campus Solutions 9.2: Financial Aid)
"Setting Up Loan Participants" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Pages Used to Set Up Loan Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Loan	SS_FA_INSTALL3	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options > Loan	Use this page to: • Set lender selection to appear on the student self-service page. • Control the display of entrance interview links and exit interview links on the students' self-service pages. • Specify a URL to direct students to a page with detailed information about loans. • Set up options to support your eMPN processes
Identify Self Service Lenders	SFA_LNDR_SELECT_SU	Set Up SACR > Product Related > Financial Aid > Loans > Identify Self Service Lenders	Select the preferred lender for each loan type.
Create CRC Loan Participants	SFA_CRC_DEST_ID	Set Up SACR > Product Related > Financial Aid > Loans > CR Common Line > Create CRC Loan Participants	Identify the lenders for Common Line loans.

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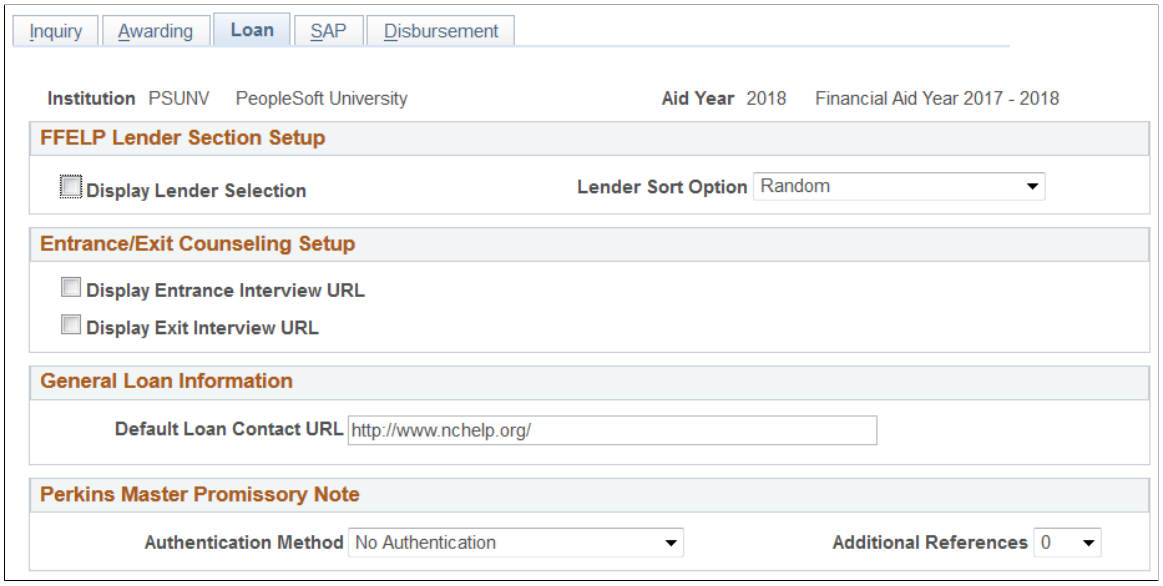
Page Name	Definition Name	Navigation	Usage
Maintain Lender Codes	LENDER_LOAD_MAINT	Set Up SACR > Product Related > Financial Aid > Loans > Common Line 4 > Maintain Lender Codes	Identify the lenders for CL4 loans.

Displaying Lender Selection

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

Image: Loan page

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



Use this page to set up lender selection for the student and ensure that the preferred lenders are set up. You might have set up lenders while processing FFELP loans.

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.

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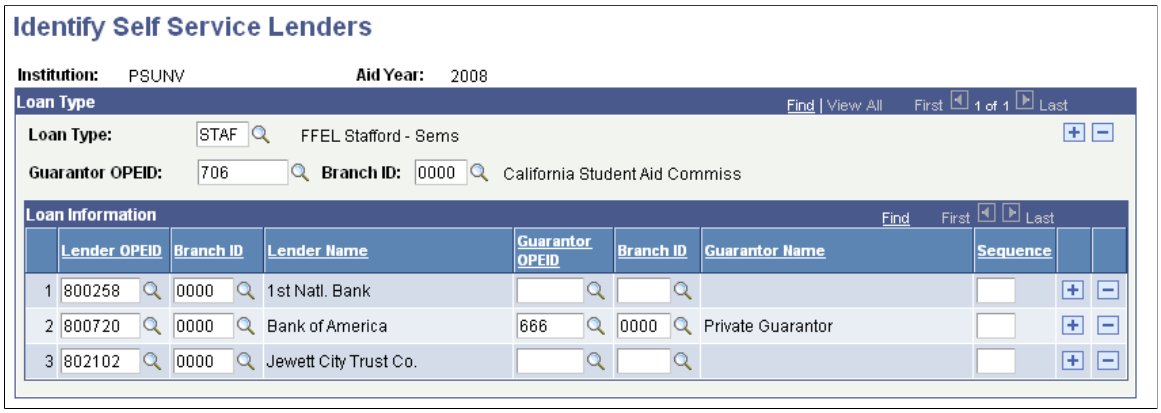
Sequence Number results in lenders being displayed based on the sequence number that was assigned to each lender on the Identify Self-Service Lenders page.

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.



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.

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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 (gurantor office of postsecondary education identifier) — 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.

Branch ID — Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.

Loan Information

Lender OPEID (lender office of postsecondary education identifier) — Enter the lender OPEID available to the student for this loan type. The values in the lookup list are from the CRC participant setup.

Branch ID — Required if the Lender OPEID field is populated. Enter the branch ID that is associated with the lender.

Guarantor OPEID (gurantor 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.

Branch ID — Required if the Guarantor OPEID field is populated. Enter a branch ID that is associated with the guarantor.

Sequence — If *Sequence Number* is selected in the Lender Sort Option field on the Loan Options page, use this field to display the lenders to the student. to the student.

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

Controlling the Display of Loan Counseling Links

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

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

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Entrance Exit Counseling Setup

These check boxes control the display of the Entrance and Exit fields on the Award Details > Loans page. If you do not want to display a link at certain times of the year, clear the check box.

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.

For more information regarding Loan Counseling Setup, see:

- "Understanding Loan Counseling" (PeopleSoft Campus Solutions 9.2: Financial Aid)
- "Understanding Disbursement Rules" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Related Links

"Managing Loan Counseling Data" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Defining General Loan Information

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

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 service provider 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.

Setting up Options for eMPN Processes

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

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.

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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.

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.

Note: These settings are not used to set up fluid functionality.

Page Used to Set Up Satisfactory Academic Progress Options

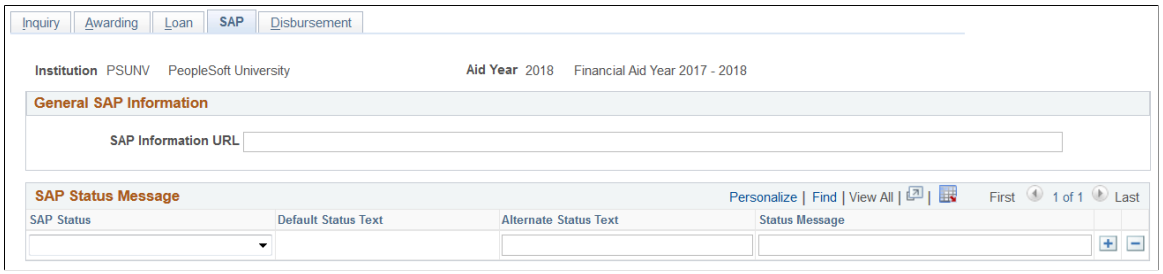
Page Name	*Definition Name*	*Navigation*	*Usage*
SAP	SS_FA_INSTALL4	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options > SAP	Control the display of the SAP informational link and SAP status text.

SAP Options for Self-Service

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

Image: SAP (Satisfactory Academic Progress) page

This example illustrates the fields and controls on the SAP (Satisfactory Academic Progress) 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.

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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 Disbursement Options

This section discusses how to display award disbursement information in PeopleSoft Fluid User Interface.

Page Used to Set Up Disbursement Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Disbursement	SS_FA_INSTALL5	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self Service Options > Disbursement	Define how disbursement information is displayed.

Disbursement Options

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

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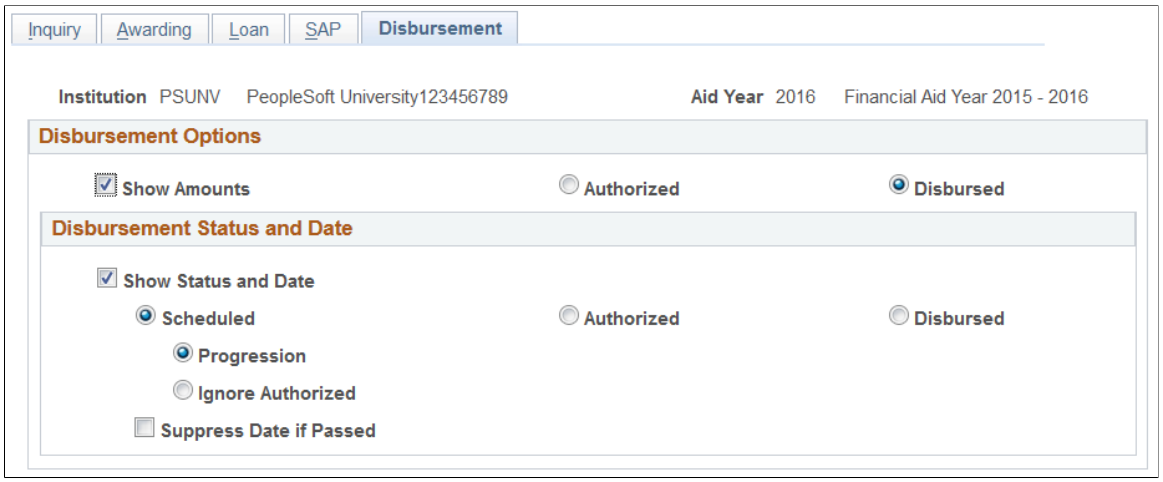
Image: Disbursement page

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



To access this page, you must select the Fluid Self Service check box on the Financial Aid Defaults page. See "Establishing Defaults" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Use this page to define how disbursement information appears in PeopleSoft Fluid User Interface.

Disbursement Options

Show Amounts

Select to display award disbursement amounts, then select any one of these options:

- *Authorized*: Select to treat any authorized amount as disbursed. The amount is displayed in the Disbursed fields.
- *Disbursed*: (default) Select to show the amount only when the award amount has been disbursed and not just authorized.

If you select this check box, Show Status and Date is enabled.

Disbursement Status and Date

Show Status and Date

Show Status and Date works in conjunction with Show Amounts.

Select to display award disbursement statuses and dates, then select any one of these options:

- *Scheduled*: Select to display disbursement status that starts with ‘Scheduled’. The scheduled date is retrieved from the Disbursement ID setup record.

  If you select this option, Progression (default), Ignore Authorized, and Suppress Date if Passed are enabled.

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- *Authorized*: Select to display the disbursement status and date that start with 'Authorized'. The Authorized date is followed by the Disbursed date as the award for a Disbursement ID progresses from authorized to disbursed state.
- *Disbursed*: (default) Select this option to display the disbursement status and date only when the award amount has been 'Disbursed'.

Progression Select to display the Scheduled date followed by the Authorized date followed by the Disbursed date as the award for a Disbursement ID progresses through various disbursement states.

Ignore Authorized Select to display the Scheduled date followed by the Disbursed date as the award for a Disbursement ID progresses from a Scheduled to a Disbursed state.

When you select this option, once the award amount is *Authorized*, the system continues to treat the award amount as *Scheduled*.

If you select Show Amounts = *Authorized* and Show Status and Date = *Ignore Authorized*, you receive a warning that prevents you from selecting this combination. The system then automatically sets Show Amounts = *Disbursed*.

Suppress Date if Passed Select if you do not want to display the Scheduled Disbursement Date if it has passed (that is, Scheduled Disbursement Date occurs earlier than the current date).

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.

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

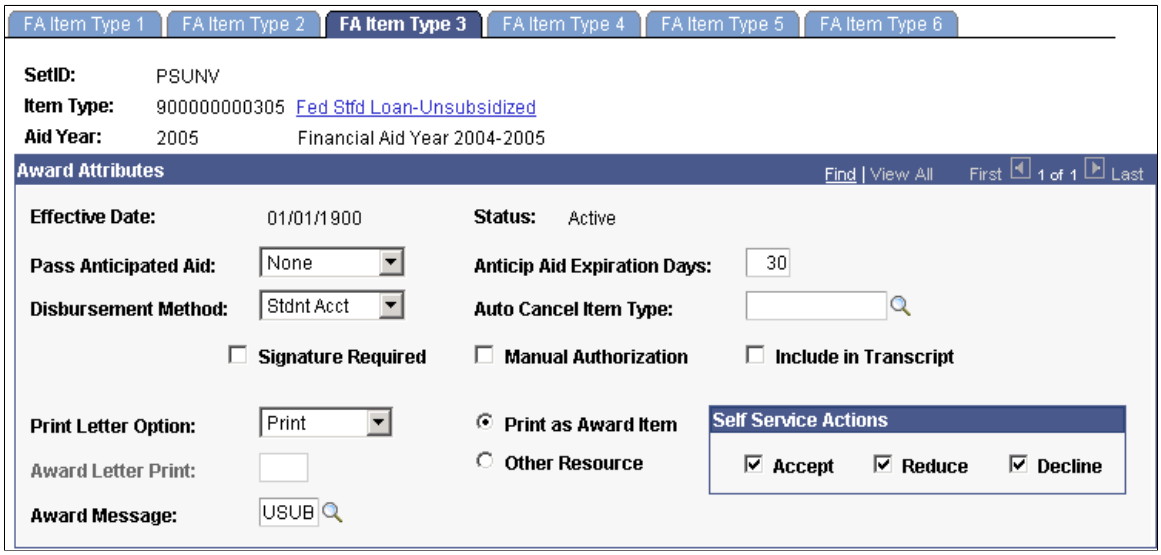
Page Name	*Definition Name*	*Navigation*	*Usage*
FA Item Type 3	ITEM_TYPE_FA_3	Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types > FA Item Type 3	Set up disbursement information and self-service action options.
Packaging Status Summary	STDNT_AID_PACKAGE	Financial Aid >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

Defining Self-Service Actions in Packaging

Access the FA Item Type 3 page (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.*

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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 9.2: Financial Aid)

"Defining Disbursement and Anticipated Aid" (PeopleSoft Campus Solutions 9.2: Financial Aid)

Defining Self-Service Access in Packaging

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

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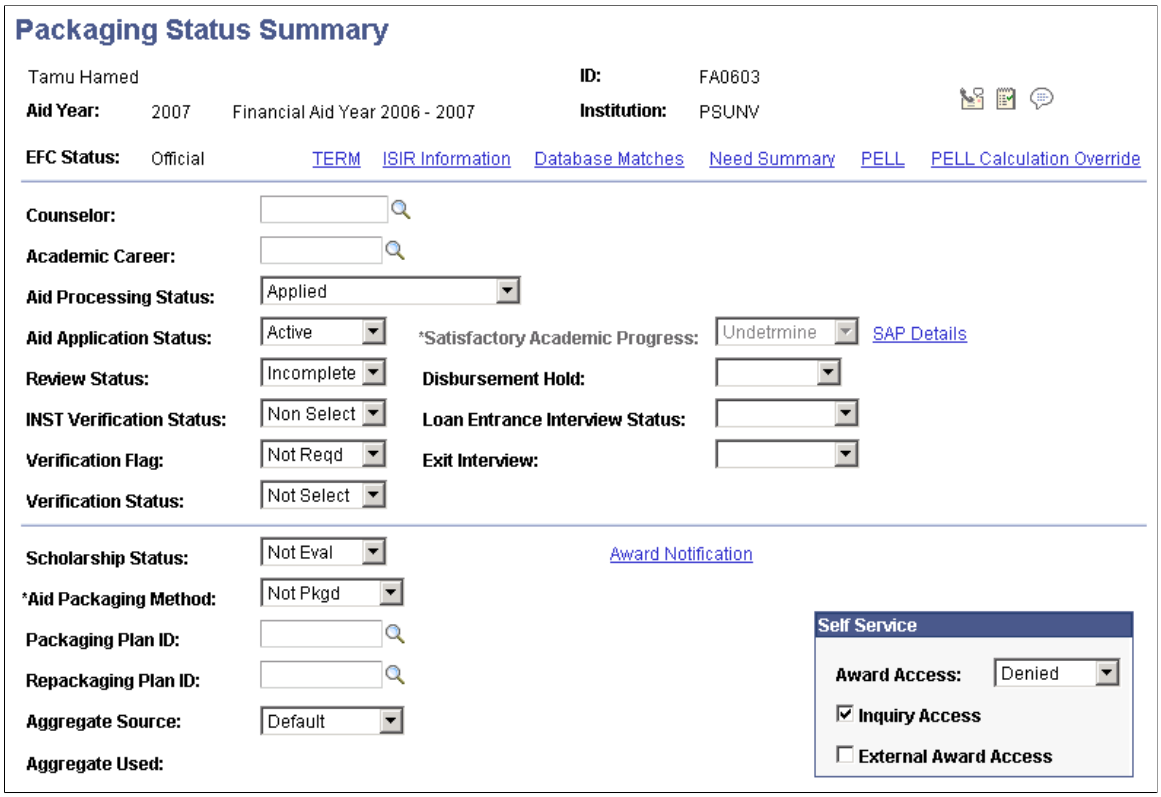
Image: Packaging Status Summary page

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.



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 acknowledgment for the given year regardless of filtering option criteria established in self-service awarding options setup.

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.

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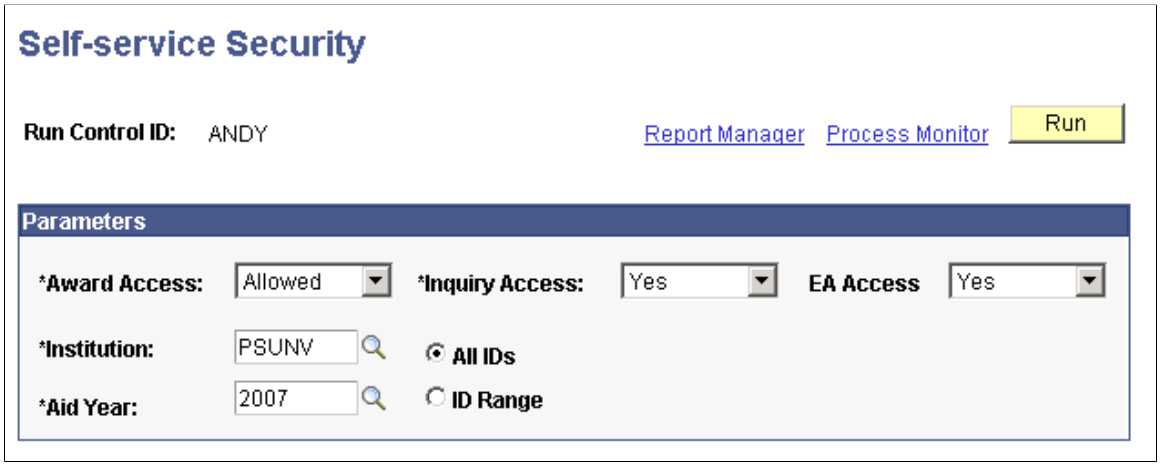
Changing Award and Inquiry Access

Access the Self-service Security page (Financial Aid > Awards > Self Service Awarding > Assign Self Service Access > Self-service Security).

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.



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.

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Page Used to Modify Self-Service Loan Status Descriptions

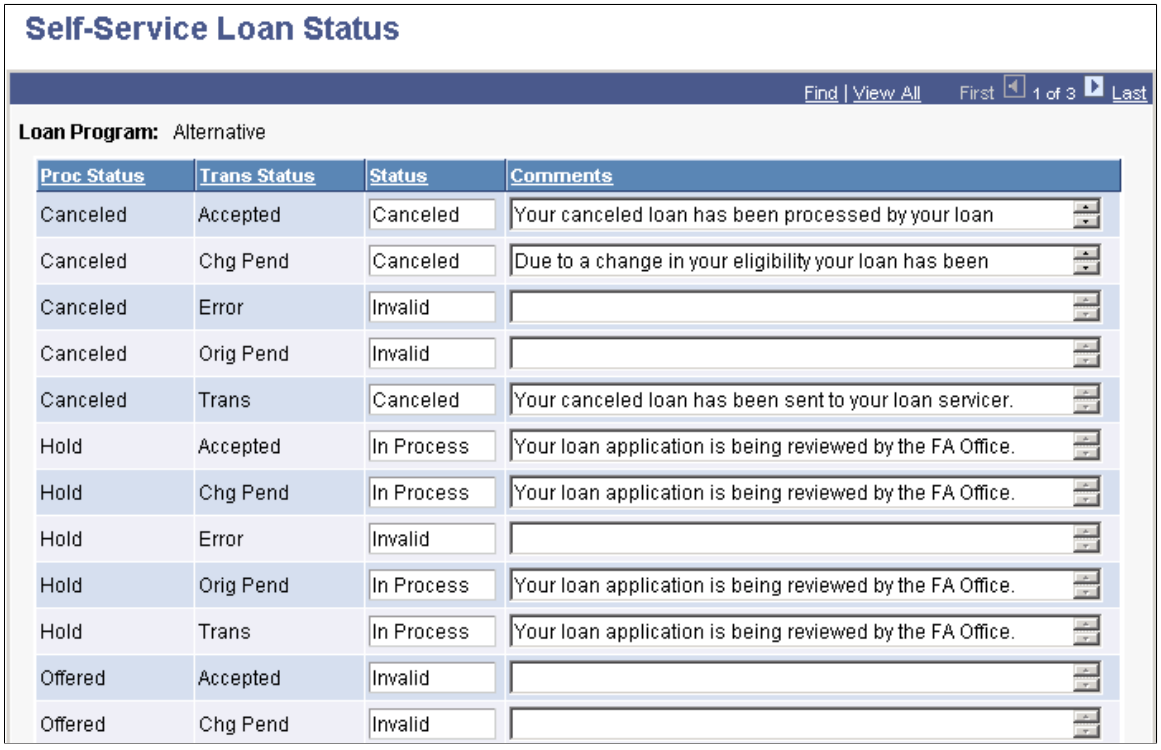
Page Name	*Definition Name*	*Navigation*	*Usage*
Self-Service Loan Status	SS_FA_LOAN_STAT	Set Up SACR > Common Definitions > Self Service > Financial Aid > Self-Service Loan Status	Modify loan status descriptions and comments text that you want a student to see online. This page provides students with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

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.



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.

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Creating User-Defined Text

Each self-service classic or fluid 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.

Defining Custom Text for Fluid Interfaces

To define custom text for fluid interfaces, use the following message numbers in Message Set 14409.

Use Message Number	***To Define Custom Text For***
1401	Outstanding Offers Page
1404	Manage Accepted Awards Page
1405	Award Summary Page
1406	Award Details, General Page: Award Status (if the status is *offered*)
1407	Award Details, Amounts Page
1408	Award Details, Loan page: Entrance Interview (if the status is *incomplete*)
1409	Award Details, Loan page: Exit Interview (if the status is *incomplete*)
1410	Award Details, Loan page: Promissory Note Status (if the note status is *unsigned*)
1411	Award Details, Loan page

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Use Message Number	*To Define Custom Text For*
1412	Award Summary, Declined Awards page
1413	Award Summary, Canceled Awards page
1414	Accept/Decline Page
1415	Disbursement Status is Scheduled
1416	Disbursement Status is Authorized
1417	Disbursement Status is Disbursed
1431	Outside Aid page
1432	Report Outside Aid page
1434	View Outside Aid page
1435	Need Summary page
1436	Cost of Attendance page
1437	Expected Family Contribution page
1439	Financial Aid Summary User Defined page
1440	Shopping Sheet Page, New Window Warning
1441	Shopping Sheet Page

Related Links

Managing Financial Aid Using PeopleSoft Fluid User Interface

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Chapter 8

Setting Up Recruiting and Admissions Self-Service

Understanding Self-Service Request Information

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

Prerequisites

Before you can set up your parameters for the Request Information transaction, you must set up a communications infrastructure in PeopleSoft 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 9.2: Campus Community)

"Defining 3C Engine Events" (PeopleSoft Campus Solutions 9.2: 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).

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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

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

Enabling Segments and Prospect Career Fields

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

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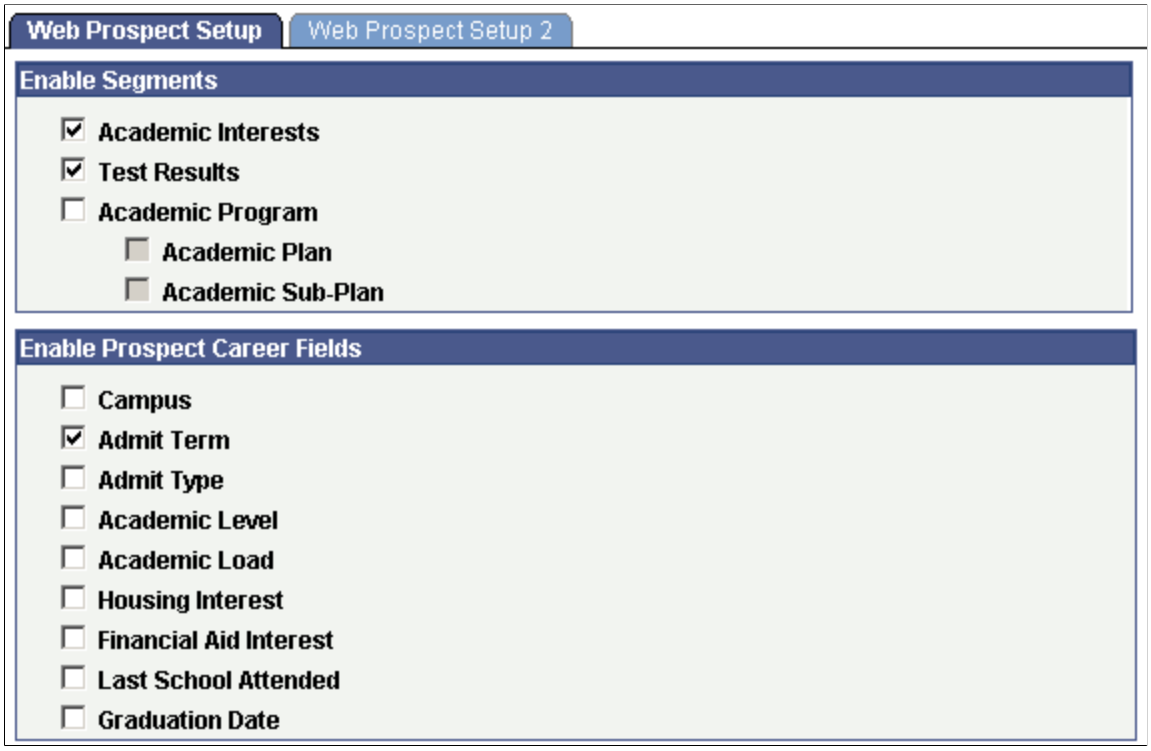
Image: Web Prospect Setup page

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

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).

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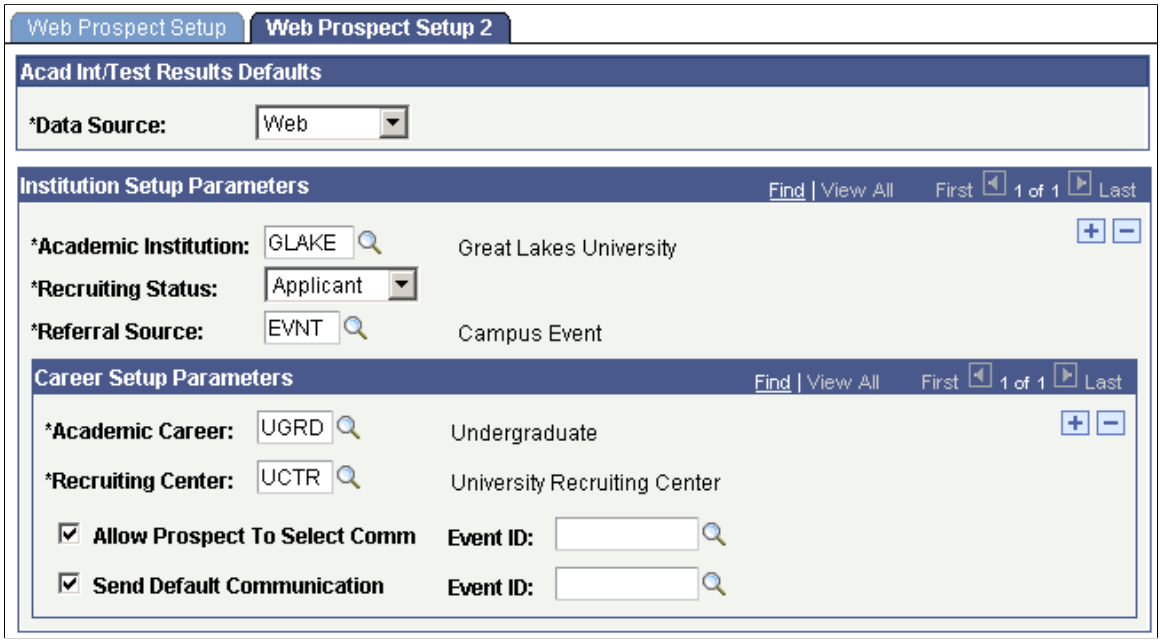
Note: Clearing a check box in this group box hides its corresponding field on the Request Information detail page. For example, if you clear the Academic Level check box, visitors to your website do not see the Academic Level field on the Request Information detail page.

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.

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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.

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See "Creating an Event" (PeopleSoft Campus Solutions 9.2: Campus Community).

Configuring Self Service Display for Applicants

This topic discusses how to configure the Self Service display for applicants.

For the classic user interface, the application status can be displayed on the Application Status self-service page, the Admissions section of the Student Center and Student Services Center pages. The checklist due date and checklist contact can be displayed on the Application Status page.

For the Fluid user interface, you can customize the Self Service display around specific applicant groups for these elements: Institution, Academic Career, and Admit Term information.

Pages Used to Configure Self Service Display for Applicants

Page Name	*Definition Name*	*Navigation*	*Usage*
Applicant Status Options	SAD_APPL_STATUS	Set Up SACR >Product Related >Recruiting and Admissions >Applicants > Applicant Status Options	Configure display options for application status and checklist item for the classic user interface.
Define Attributes	SAD_FLSS_DEF_ATT	Set Up SACR >Product Related >Recruiting and Admissions >Applicants > Fluid Applicant SS Setup >Define Attributes	Define attributes for an applicant group for the Fluid user interface.
Display Options	SAD_FLSS_DISPLAY	Set Up SACR >Product Related >Recruiting and Admissions >Applicants > Fluid Applicant SS Setup >Display Options	Configure display options for applications, decisions, or program actions.
Additional Options	SAD_FLSS_ACCDECC	Set Up SACR >Product Related >Recruiting and Admissions >Applicants > Fluid Applicant SS Setup >Additional Options	Configure display options for contact details, accept or decline offers, or wait-list actions.
Self Service Requests	SAD_FLSS_REQUEST	Set Up SACR >Product Related >Recruiting and Admissions >Applicants > Fluid Applicant SS Setup >Self Service Requests	Configure display options for requests for deferrals, withdrawals, or change of program or plan.

Configuring Display Options for Application Status and Checklist Items

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

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Use Applicant Status Options page to configure display options for applicants using Self Service classic interface.

Show Application Status

Select to display the application status on the Application Status, Student Center and Student Services Center 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 9.2: Campus Community)

Show Checklist Item Due Date

Select to display the due date and the Outstanding Items in the Application section of the Application Status page.

Show Checklist Item Contact

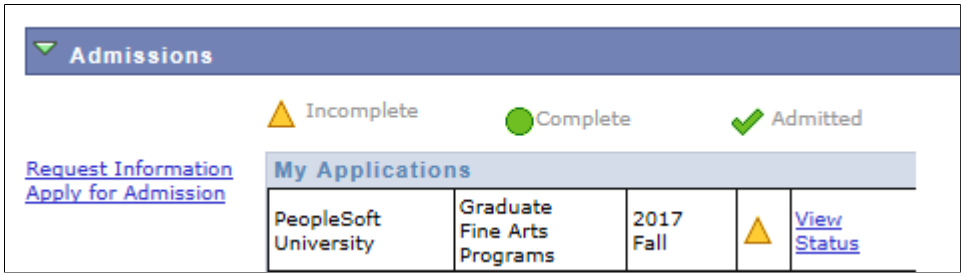
Select to display the checklist contact and the Outstanding Items in the Application section of the Application Status page.

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.



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.

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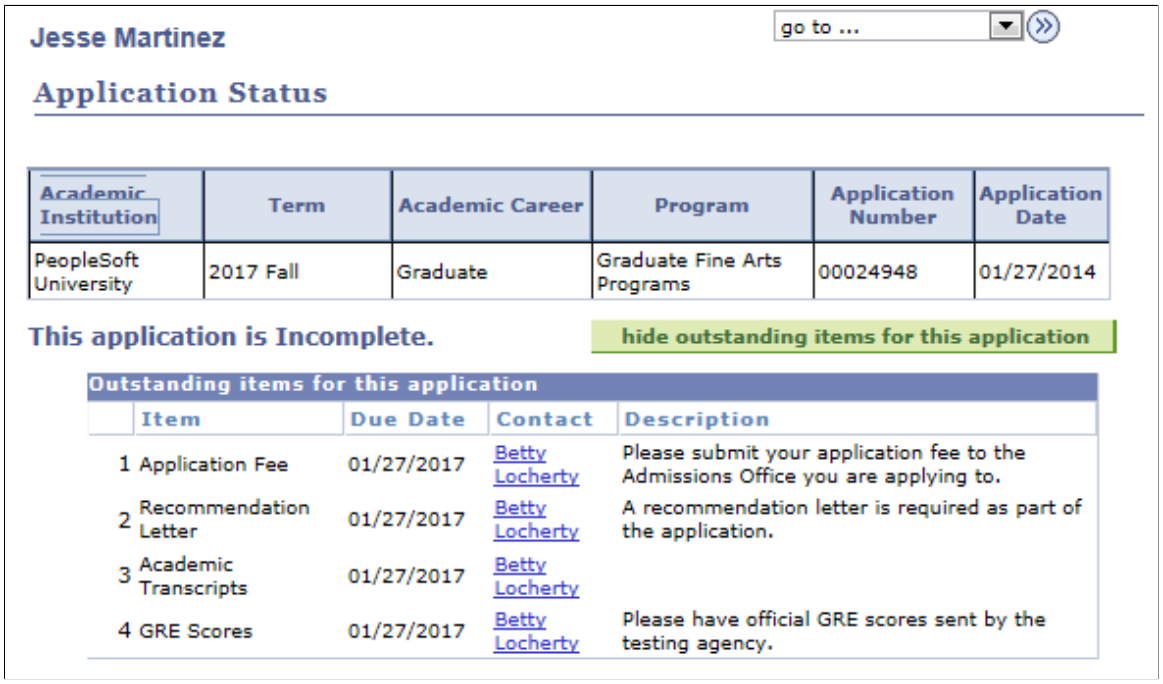
Image: Example of Applicant Status page displaying Due Date and Contact columns

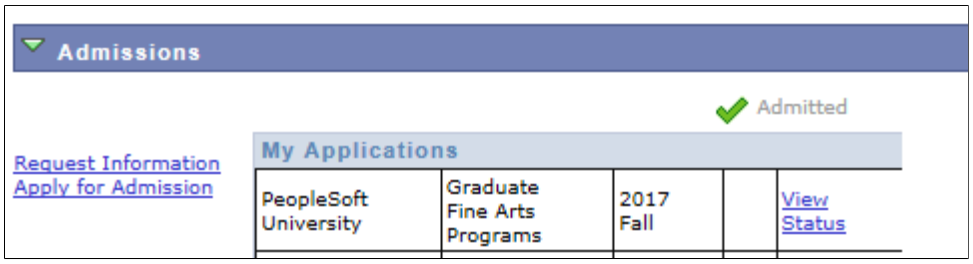
This is an example of Applicant Status page displaying the Due Date and Contact columns.



If you did not select the Show Application Status check box and the Complete check box for the PSUNV-Fine Arts Graduate application, the Admissions section in the Student Center page does not display any 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 does not display the Due Date and Contact columns.

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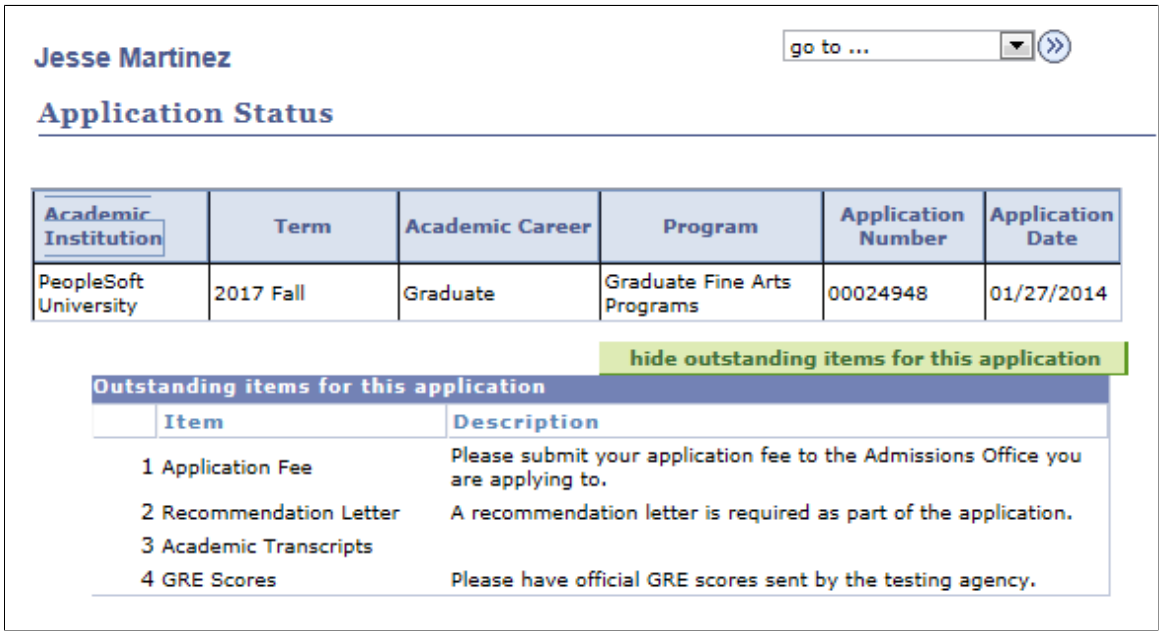
Image: Example of Applicant Status page not displaying Due Date and Contact columns

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



Defining Applicant Attributes for Applicant Self Service

Access the Define Attributes page (Set Up SACR >Product Related >Recruiting and Admissions >Applicants >Fluid Applicant SS Setup >Define Attributes).

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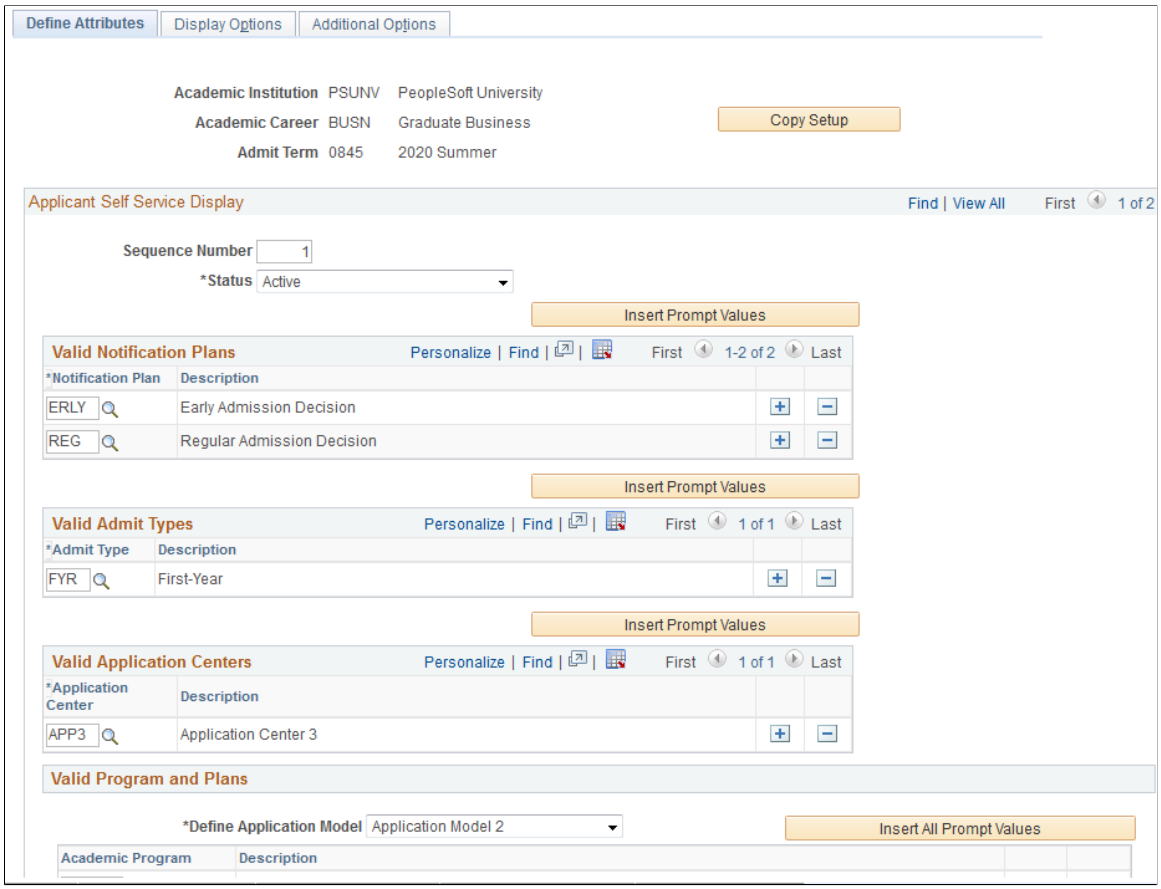
Image: Define Attributes page

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



Use the Define Attributes page to configure a set of attributes for an applicant cohort. The attributes you define are used to determine which options on the Display Options and Additional Options pages apply to an applicant cohort.

You can define one sequence to apply to all applicants or you can define multiple sequences under Institution, Academic Career and Admit Term to handle various applicant groups where you want to vary the display and timing of display to those groups.

Copy Setup Click to copy this setup to another term under the same institution and career.

Status Select the status for each row: active or inactive.

Valid Notification Plans

Select the type of notification plan. Click the Insert Prompt Values button to insert all valid notification plans.

Valid Admit Types

Select admit types which are valid under the institution or career.

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Valid Application Centres

Select an application center that is valid under a career. Other non-career specific application centers may be added as well.

Valid Program and Plans

Select an academic program that is valid under a career, and an academic plan that is valid under the associated career or program.

Define Application Model This field allows you to restrict setup only to the program level, or to allow for a more granular setup to the plan and sub-plan level.

Related Links

"Using the Applicant Home Page" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Configuring Display Options for Applicant Self Service

Access the Display Options page (Set Up SACR >Product Related >Recruiting and Admissions >Applicants >Fluid Applicant SS Setup >Display Options).

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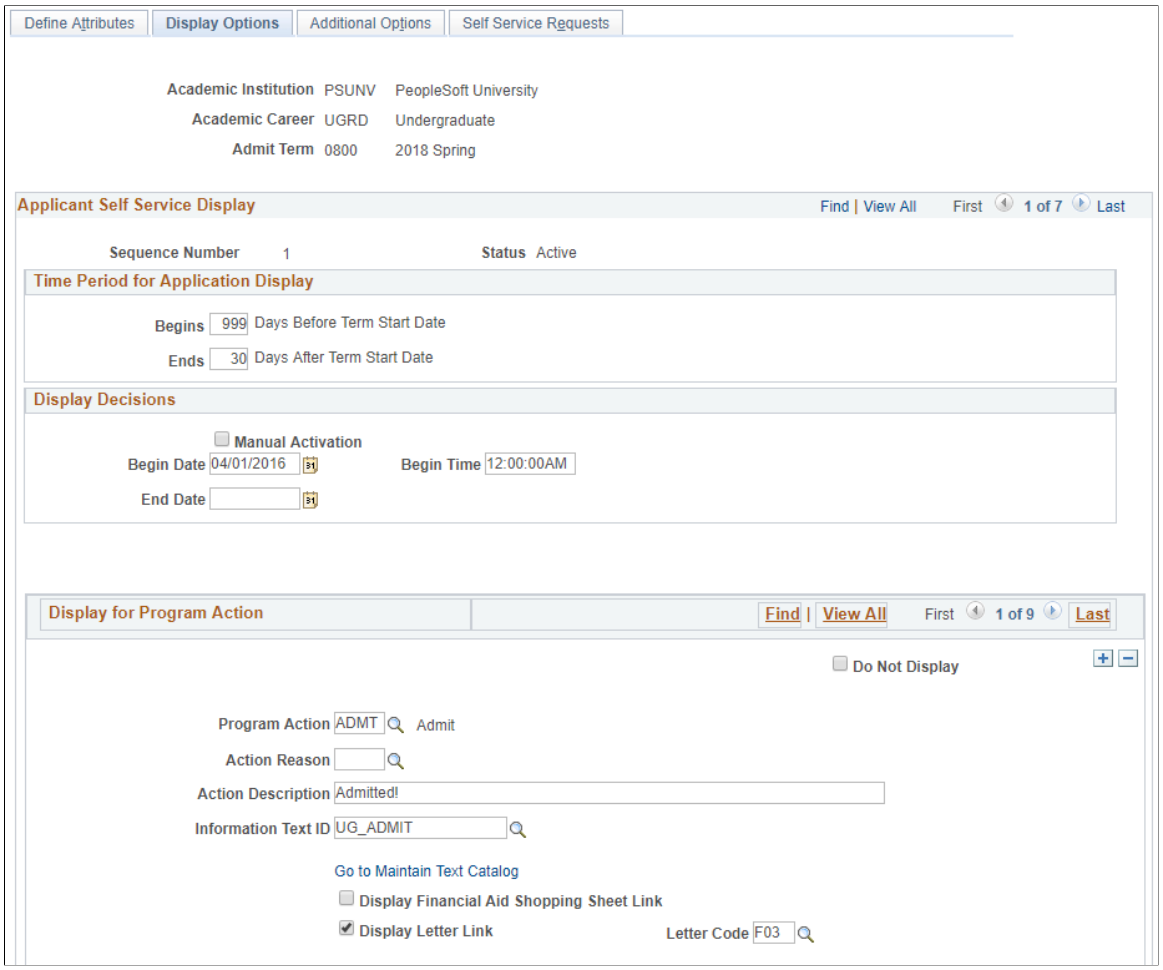
Image: Display Options page

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



Use the Display Options page to configure display options for the following items in Application Self Service in Fluid user interface:

- applications
- decisions
- program actions

Note: Self Service setup uses the Text Catalog to provide information to the applicants. Campus Solutions delivers a Text Catalog Owner ID of SAD, and a Sub ID of SSFL. In order to return values in the setup component, make sure you create your text IDs under this hierarchy.

Time Period for Application Display

Use this group box to define the length of time the application remains active in Self Service Fluid user interface. Start and end dates are calculated from the Term Start and End dates in the valid Term session table for the respective Institution and Career.

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BEGINS If you do not set a value, applicants that meet the set of attributes you define are not able to access their application in Self Service.

ENDS If you do not set a value, the application is always available in Self Service, that is, it does not expire.

Display Decisions

Use this group box to define when decisions become available to applicants in Self Service for the cohort defined for this sequence.

Manual Activation Select this check box to indicate that a user manually activates whether decisions appear in Self Service. When Manual Activation is selected, the Begin Date is disabled and any value previously populated is ignored.

Decisions may be any one of the following Program Action values:

- ADMIT (Admit)
- COND (Conditional Admit)
- WAIT (Waitlist)
- WAOF (Waitlist Offer)
- DENY

Activate This field is enabled only if you select Manual Activation. If Activate is selected, the decisions are immediately available to applicants in Self Service.

Begin Date Specify the date when you would like the decisions to be made available in Self Service.

Begin Time This field becomes available when you populate Begin Date. Specify an exact time on the Begin Date to display the decisions.

End Date Set the date when the decisions stop displaying.

Delay Days Use this option if you want decisions to appear for a set number of days from the decision row effective date. For example, if a program action of ADMT is dated 04/01/2016, and you specify 7 delay days, then the decision becomes available in Self Service on 04/08/2016.

This field is enabled *only* if Begin Date is blank.

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Display for Program Action

Use this group box to define which program action and action reason combinations appear in Applicant Self Service in Fluid user interface. The system obtains the program action and its corresponding reason from the current effective-dated row for the applicant or application. That program action and action reason combination is evaluated against the setup to determine whether that program action is set up for display. If the combination does not match the defined program action values, the system selects the next most current effective row from the application stack, then applies the same evaluation logic to determine what to display in Applicant Self Service.

You can specify what appears for each Program Action and Action Reason row. Some fields may or may not appear depending on the program action you select.

Do Not Display — Select this check box to prohibit the display of that program action in Self Service without needing to delete the row from the setup.

Program Action — Select values populated from the Admission Action Table.

Action Reason — Select values that are valid for the selected Program Action.

Action Description — Set a user-defined alternative text to use instead of the program action description. This appears for all program action values excluding Application (AAPL). The text you define here appears to the applicant as the status.

Information Text ID — Select a Text Catalog message to display as the content on the Status Information page which renders from the information icon.

Complete Action Description — User-defined alternative text to use instead of the program action description. Content specified here is displayed to the applicant as the Status. This field is available when the Program Action is APPL. This description will display when the application is marked complete.

Complete Text ID — Select a Text Catalog message to display as the content on the Status Information page which renders from the information icon in Self Service.

Incomplete Action Description — User-defined alternative text to use instead of the program action description. Content specified here is displayed to the applicant as the Status. This field is available when the Program Action is APPL. This description is displayed when the application has not been marked as complete.

Incomplete Text ID — Select a Text Catalog message to display as the content on the Status Information page which renders from the information icon in Self Service.

Go to Maintain Text Catalog — Select to open a new window that displays the Maintain Text Catalog component.

Display Financial Aid Shopping Sheet Link — Select to display the View Financial Aid Shopping Sheet link on the student’s Application Status page on the Fluid user interface.

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To ensure the Shopping Sheet link appears, additional setup is required within Financial Aid. See "Setting Up and Accessing a College Financing Plan" (PeopleSoft Campus Solutions 9.2: Financial Aid).

Display Letter Link Select this check box to display the View Decision Letter link to the applicant in Applicant Self Service.

This is available when the program action is:

- ADMIT (Admit)
- COND (Conditional Admit)
- DENY
- WAIT (Waitlist)
- WAOF (Waitlist Offer)

Letter Code Select the Letter Code that is typically assigned to the applicant cohort defined for the associated program action.

This is available when the program action is:

- ADMIT (Admit)
- COND (Conditional Admit)
- DENY
- WAIT (Waitlist)
- WAOF (Waitlist Offer)

Related Links

"Using the Applicant Home Page" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Configuring Other Display Options for Applicant Self Service

Access the Additional Options page (Set Up SACR >Product Related >Recruiting and Admissions >Applicants >Fluid Applicant SS Setup >Additional Options).

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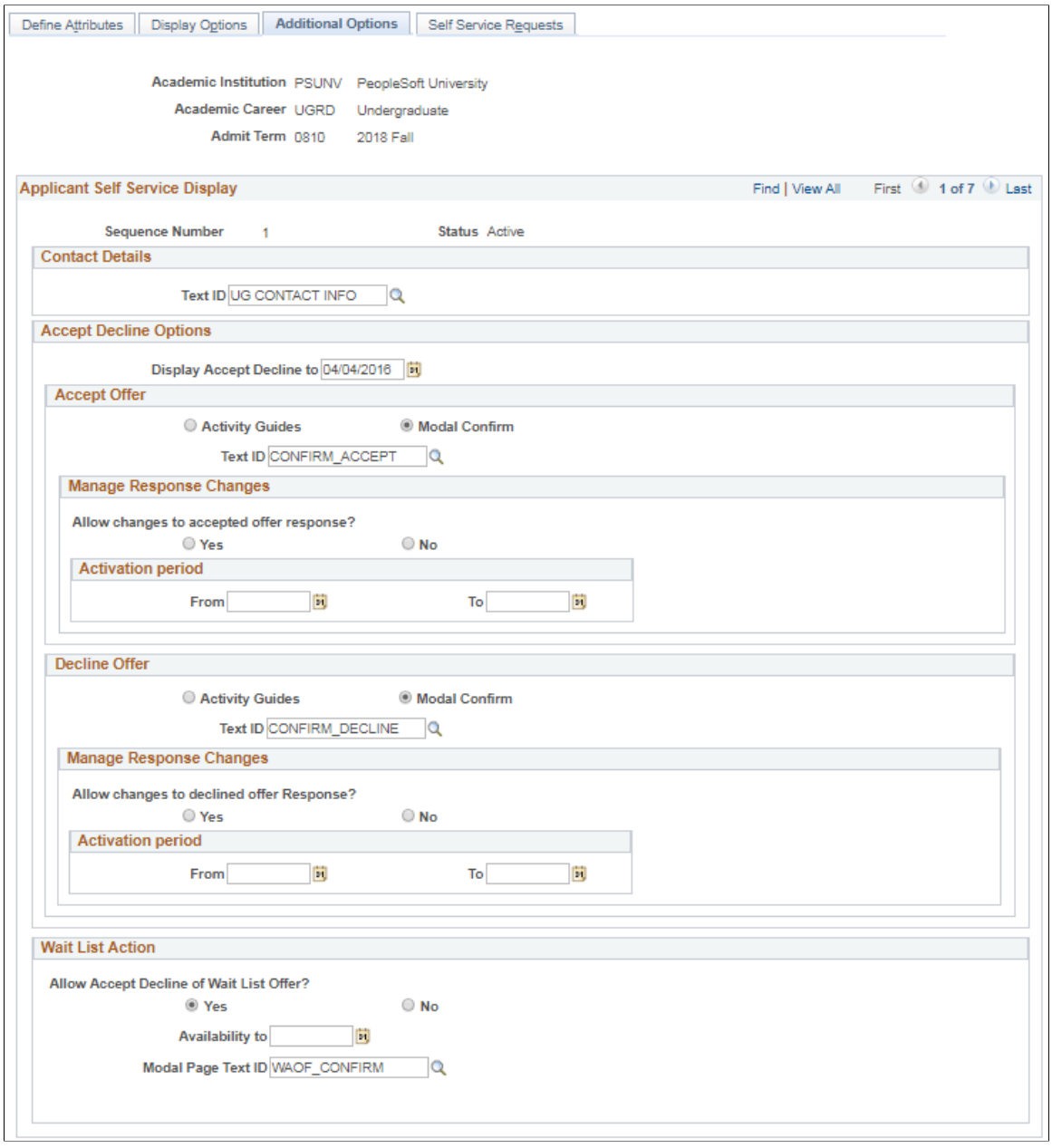
Image: Additional Options page

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



Use the Additional Options page to configure display options for contact details, accept or decline offers, and wait-list actions for Applicant Self Service. The options you define on this page appear only for applicants that meet the criteria you define on the Define Attributes page. See Defining Applicant Attributes for Applicant Self Service.

Contact Details

Select a Text ID from the Text Catalog to provide Content to the Contact Information page which renders from the Contact Us link in Self Service.

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Accept Decline Options

Display Accept Decline to

While the applicant does not act on an Offer of Admission, use this field to specify the date by which the Accept and Decline buttons continue to appear on the Application Status page.

If the date you set is greater than the current date, the Accept and Decline buttons are displayed until the date you specified is reached. Once the date you set is reached, the buttons do not appear on the Application Status page. If you do not set a value for this field, the buttons are always displayed.

Accept Offer / Decline Offer

Use this group box to define whether a Modal Confirm or Activity Guide is used when an applicant clicks the Accept or Decline button on the Application Status page. Depending on what you select, either the Modal Confirm or Activity Guide label and fields are displayed.

If you use an Activity Guide, you can select which Activity Guide to launch. PeopleSoft Campus Solutions delivers activity guides for Accept (SAD_ACCPOC) and Decline (SAD_DECPOC) options. These are intended as proofs of concept to demonstrate how each activity can be configured. Oracle recommends that you clone and configure guides for your own content and business process requirements.

In the delivered example, the Accept Offer activity guide leads the applicant through the acceptance steps of understanding the terms of the offer of admission and confirmation. Upon exiting the activity guide, the applicant is returned to the Application Status page. At this point, a Pay Admissions Deposit button may display if a deposit is due. Selecting the button launches the Student Financials Make A Payment activity guide. The applicant is returned to the Applicant Home page after completing the payment process.

Note: An applicant is able to view and use the Pay Admissions Deposit button while using the modal confirm method.

If an applicant declines an offer, the activity guide leads the applicant through a confirmation and survey, similar to existing Self-Service functionality in the classic user interface. Responses are populated on the Application Student Response page in Application Maintenance. Upon submitting the survey, the applicant is returned to the Application Status page.

For more information, see:

- Managing Financial Accounts Using PeopleSoft Fluid User Interface
- Setting Up Institution Sets
- "Understanding Student Activity Guides" (PeopleSoft Campus Solutions 9.2: Campus Community)

Manage Response Changes

Use this group box to allow applicants to change their response to the admission offer.

Allow changes to accepted offer Response

Select *Yes* to allow applicants who accepted the admission offer to change their response. By default, No is selected.

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Allow changes to declined offer Response Select *Yes* to allow applicants who declined the admission offer to change their response. By default, No is selected.

Activation Period Use this field to specify the date by which students are able to change their response.

If you do not set a date, the ability to change a response is always available .

Wait List Action

Use this group box to determine whether to allow applicants to accept or decline an offer to be on the wait list. When an applicant:

- accepts a wait-list offer, the program action WAIT (waitlist) is inserted in the applicant's application program action stack.
- declines a wait-list offer, the program action WAPP (applicant withdrawal) is inserted in the applicant's application program action stack.

Allow Accept Decline of Wait List Offer Select whether to allow applicants to accept or decline an offer to be on the wait list.

Availability to While the applicant does not act on a Wait List Offer, use this field to specify the date by which the Accept and Decline buttons continue to appear on the Application Status page.

If the date you set is greater than the current date, the Accept and Decline buttons are displayed until the date you specified is reached. Once the date you set is reached, the buttons do not appear on the Application Status page. If you do not set a value for this field, the buttons are always displayed.

Related Links

"Using the Applicant Home Page" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Configuring Display Options for Requests in Applicant Self Service

Access the Self Service Requests page (Set Up SACR >Product Related >Recruiting and Admissions >Applicants >Fluid Applicant SS Setup >Self Service Requests).

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Image: Self Service Requests page 1 of 2

This example illustrates the fields and controls on the Self Service Requests page 1 of 2. You can find definitions for the fields and controls later on this page.

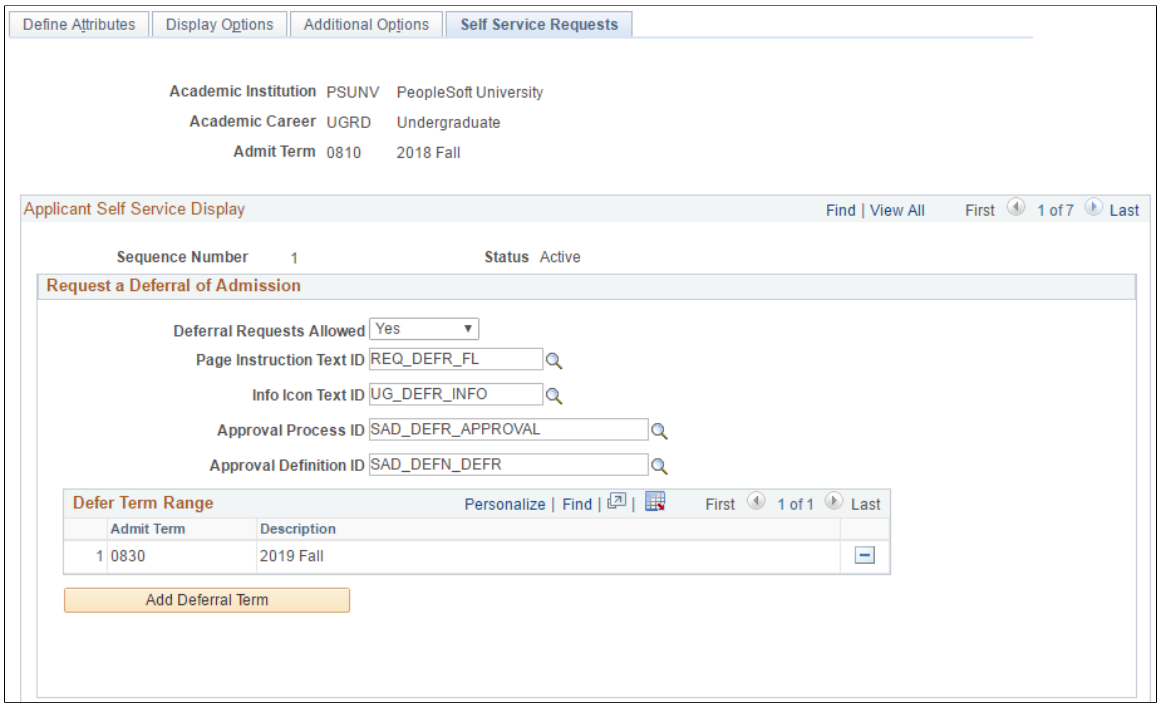
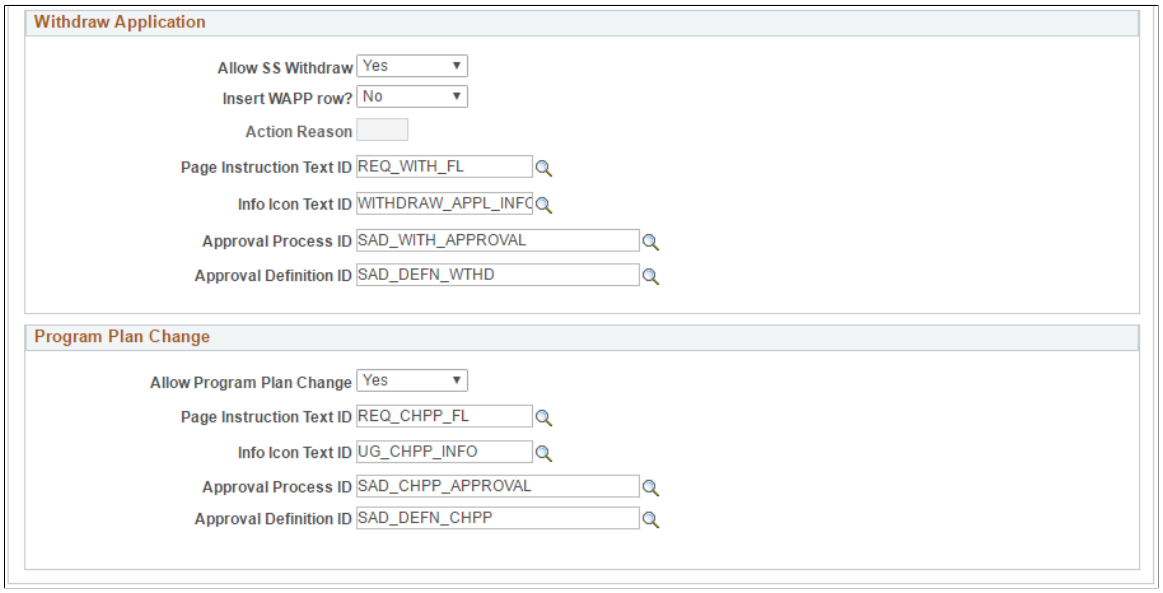


Image: Self Service Requests page 2 of 2

This example illustrates the fields and controls on the Self Service Requests page 2 of 2. You can find definitions for the fields and controls later on this page.



Use the Self Service Requests page to configure display options for the following requests in Applicant Self Service Fluid user interface: deferral, withdrawing an application, and changes to program or plan. The options you define on this page appear only for applicants that meet the criteria you define on the Define Attributes page. See Defining Applicant Attributes for Applicant Self Service

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Campus Solutions uses Approval Framework to facilitate the approval process for requests. To implement and use Approval Framework for Applicant Self Service, see Configuring Approval Framework for Applicant Self Service.

See also the product documentation for *PeopleSoft Approval Framework*.

Request a Deferral of Admission

Deferral Requests Allowed — Select whether to allow students to defer an admission.

Page Instruction Text ID — Select a text catalog entry that contains the information you want to display on the Fluid Self Service page.

Info Icon Text ID — Select a text catalog entry that contains the instructions that you want to display. This message appears when users click the information icon on the Requests page.

Approval Process ID — Select the process ID that you created for the deferral process.

Approval Definition ID — Select a definition ID that is configured for use with the Approval Process ID you selected.

Defer Term Range — Identify the valid terms to which an applicant can request a deferral. The values you add to this table appear on the Request a Deferral page in Self Service.

Withdraw Application

Allow SS Withdraw (Allow Self Service Withdraw) — Select whether to allow students to withdraw an application.

Insert WAPP Row (Insert Application Withdrawal Row) — Use this field to indicate whether the request to withdraw is automatically approved.

Select:

- *No* to manually approve the withdrawal request. The Action Reason field is disabled, and the Approval Process and Approval Definition ID fields are enabled and must be set.
- *Yes* and the system considers this as an automatic action and is handled by PeopleCode. An approval workflow is not needed. The Action Reason field is enabled and the Approval Process and Approval Definition ID fields are disabled. When the applicant confirms the withdrawal action, a WAPP row and the action reason is inserted in the applicant's application program action stack.

Action Reason — Select the value that is valid for the action.

Page Instruction Text ID — Select a text catalog entry that provides information to the applicant regarding the request for withdrawal. This information appears on the Fluid Self Service page.

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Info Icon Text ID Select a text catalog entry that contains the instructions that you want to display. This message appears when users click the information icon on the Requests page.

Approval Process ID Select the process ID that you created for the withdrawal process.

This field is available when Insert WAPP Row is set to *No*.

Approval Definition ID Select a definition ID that is configured for use with the Approval Process ID you selected.

This field is available when Insert WAPP Row is set to *No*.

Program Plan Change

Allow Program Plan Change Select whether to allow students to change their program or plan.

Page Instruction Text ID Select a text catalog entry that provides information to the applicant regarding the request for change. This information appears on the Fluid Self Service page.

Info Icon Text ID Select a text catalog entry that contains the information you want to display. This message appears when users click the information icon on the Requests page.

Approval Process ID Select the process ID that you created for the program plan change process.

Approval Definition ID Select a definition ID that is configured for use with the Approval Process ID you selected.

Configuring Approval Framework for Applicant Self Service

Campus Solutions utilizes Approval Framework to simplify the process of setting up the approval workflow for requests submitted through the Applicant Self Service Fluid user interface. With this, Campus Solutions provides the following setup (approval definition and transaction configuration) for each type of request. Your institution may use the delivered setup or create your own process ID using the same objects. If you choose to create your own process ID, you must create it under the Owner ID of Recruiting and Admissions. This is so you can assign the process ID you created to the Approval Process ID field.

Registering Information with Approval Framework

Use the Register Transactions page to register an approval transaction with Approval Framework. This is the page you use to create a process ID. For information about using the Register Transactions page, see *PeopleSoft Approval Framework*, Defining the Approval Transaction Registry.

Campus Solutions provides the following transaction setup for each request that applicants can submit through Self Service in Fluid user interface.

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Image: Register Transactions page for Deferrals Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Register Transactions page for Deferrals Requests in Self Service Fluid User Interface.

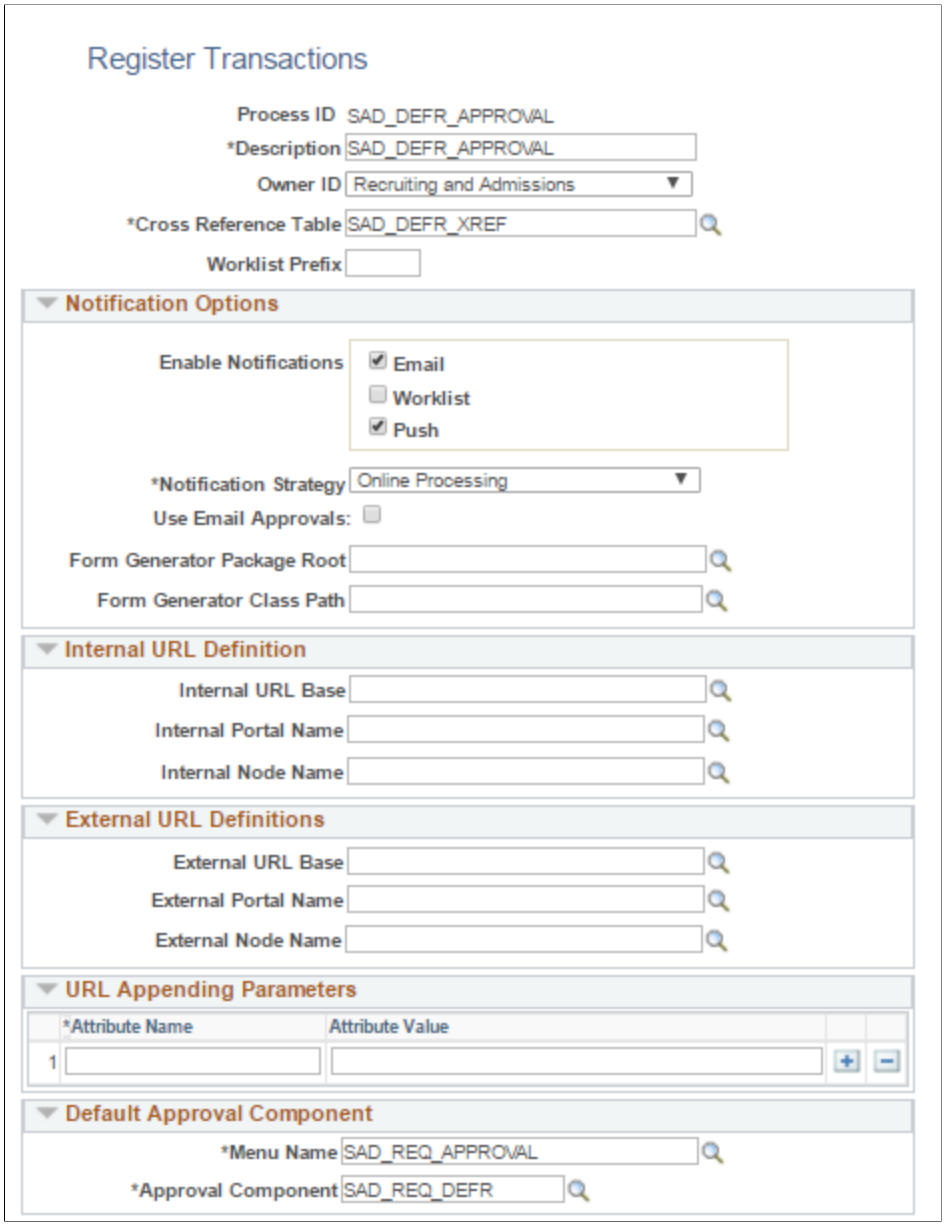

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Image: Register Transactions page for Withdrawal Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Register Transactions page for Withdrawal Requests in Self Service Fluid User Interface.

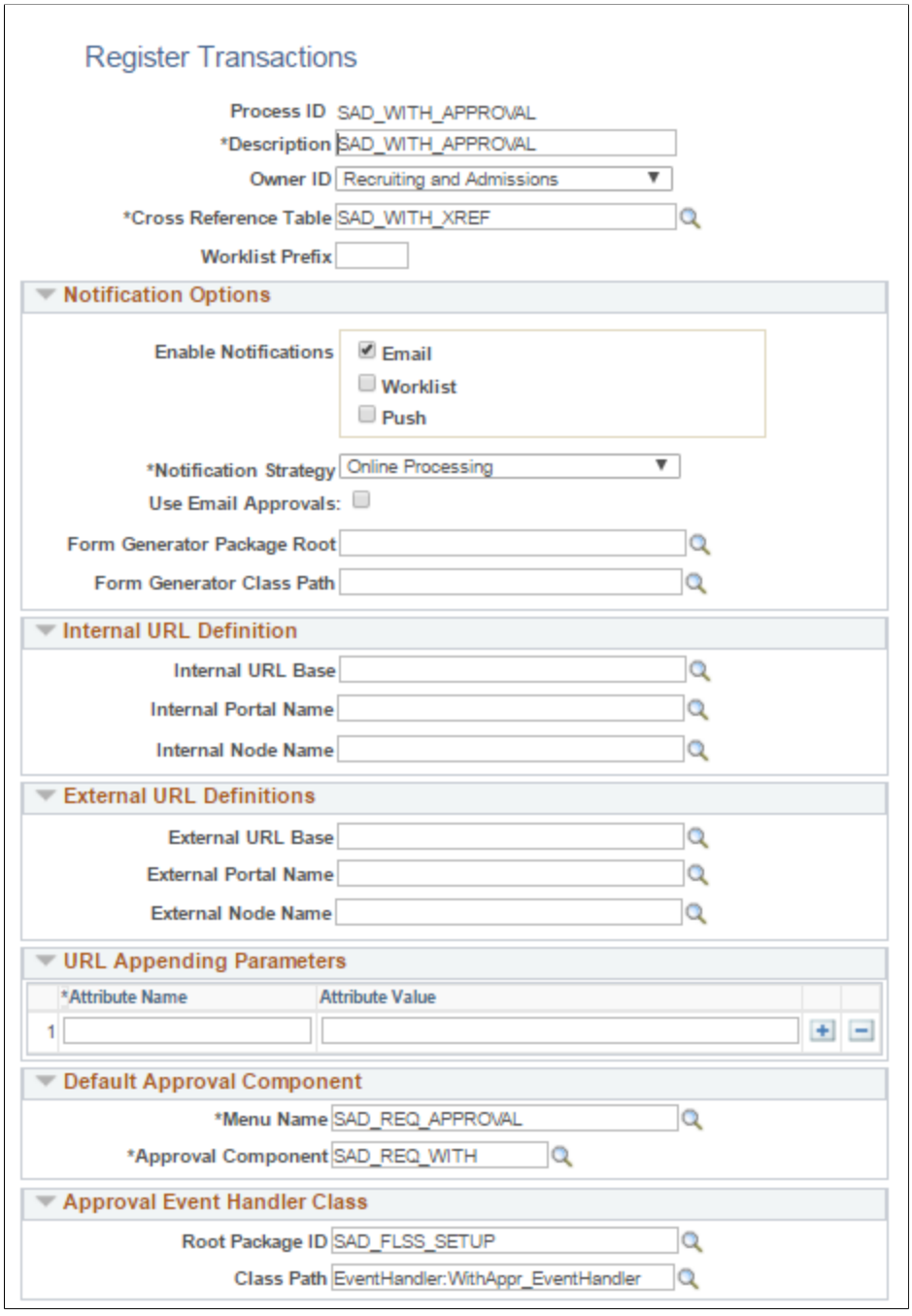

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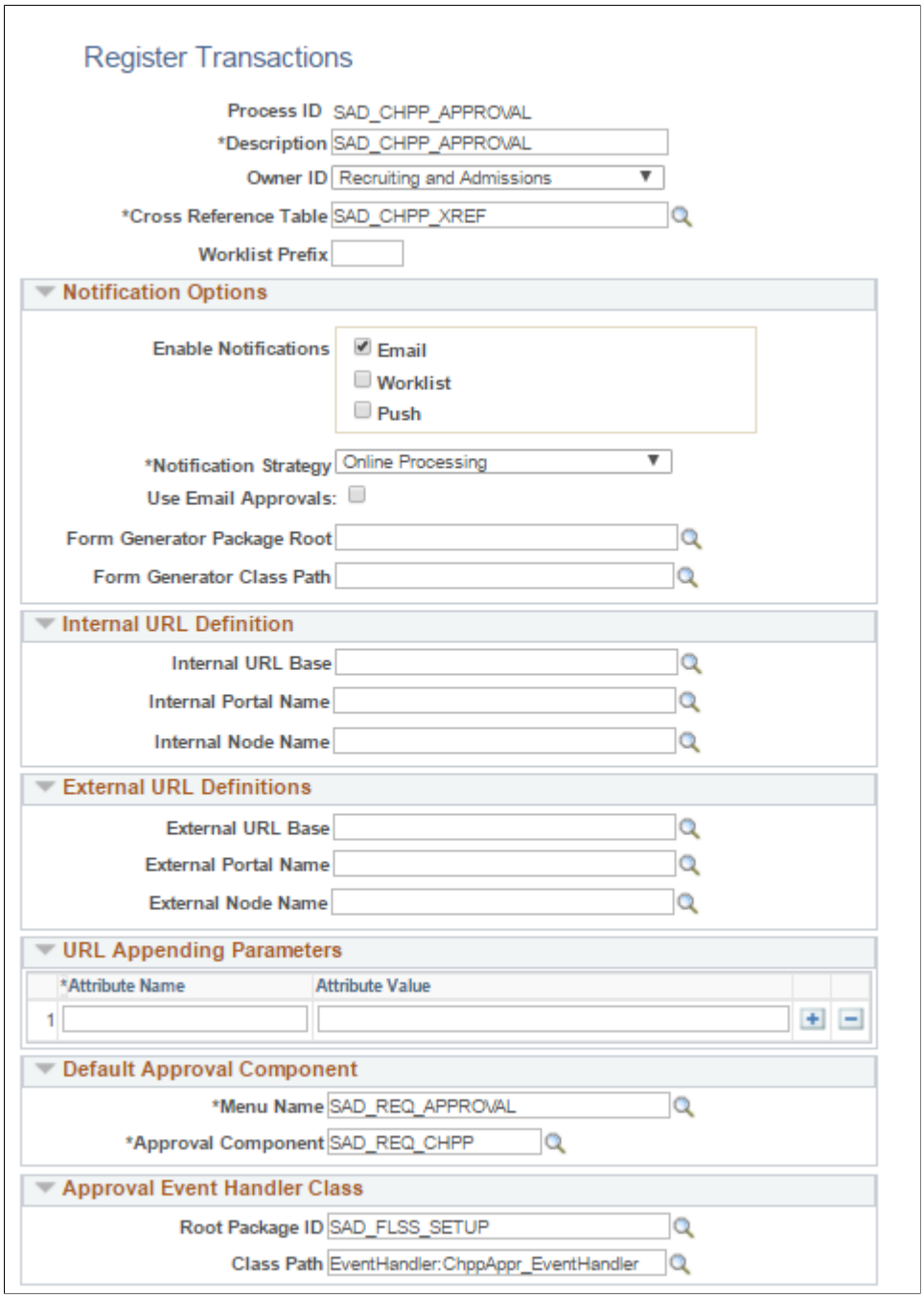
Image: Register Transactions page for Change in Program Plan Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Register Transactions page for Change in Program Plan Requests in Self Service Fluid User Interface.



Configuring Approval Transactions

Campus Solutions provides sample process IDs. For each process ID, a Configure Transactions page is set up. The Configure Transactions page is where you select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry. For information about configuring approval transaction, see *PeopleSoft Approval Framework*, Defining the Approval Transaction Registry.

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Image: Configure Transactions page for Deferral Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Configure Transactions page for Deferral Requests in Self Service Fluid User Interface.

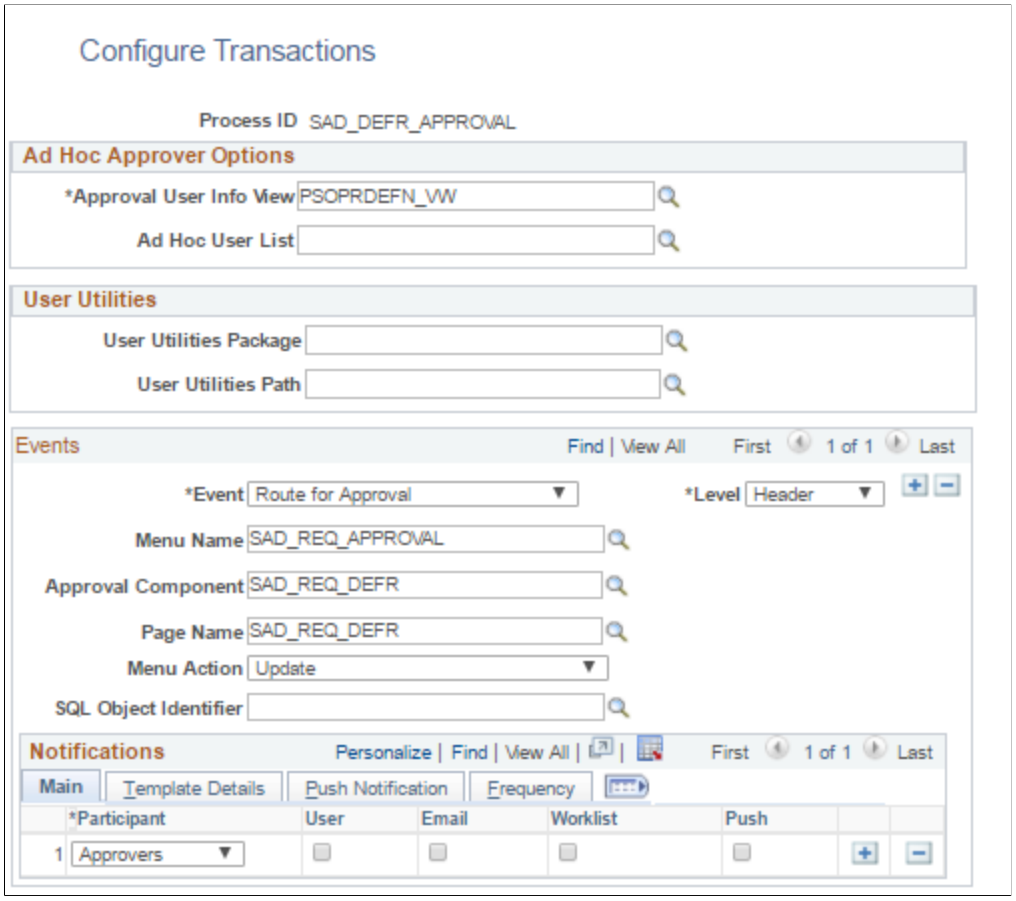

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Image: Configure Transactions page for Withdrawal Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Configure Transactions page for Withdrawal Requests in Self Service Fluid User Interface.

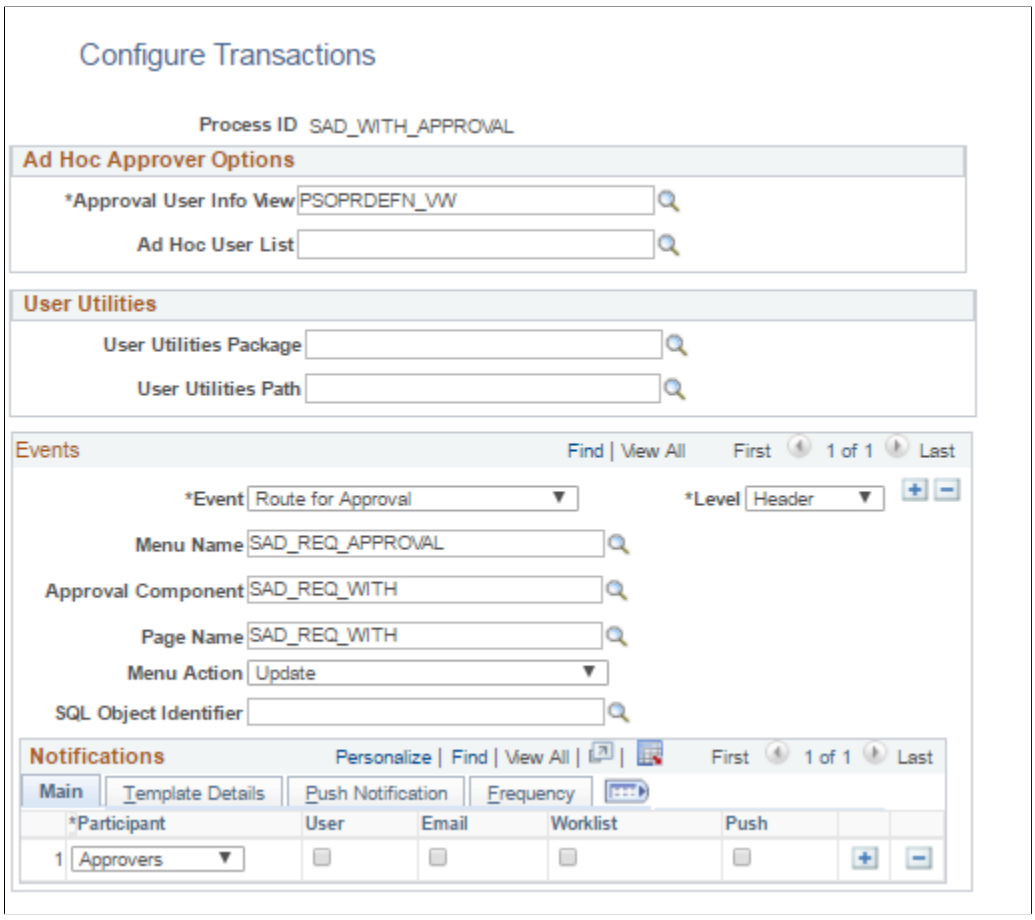

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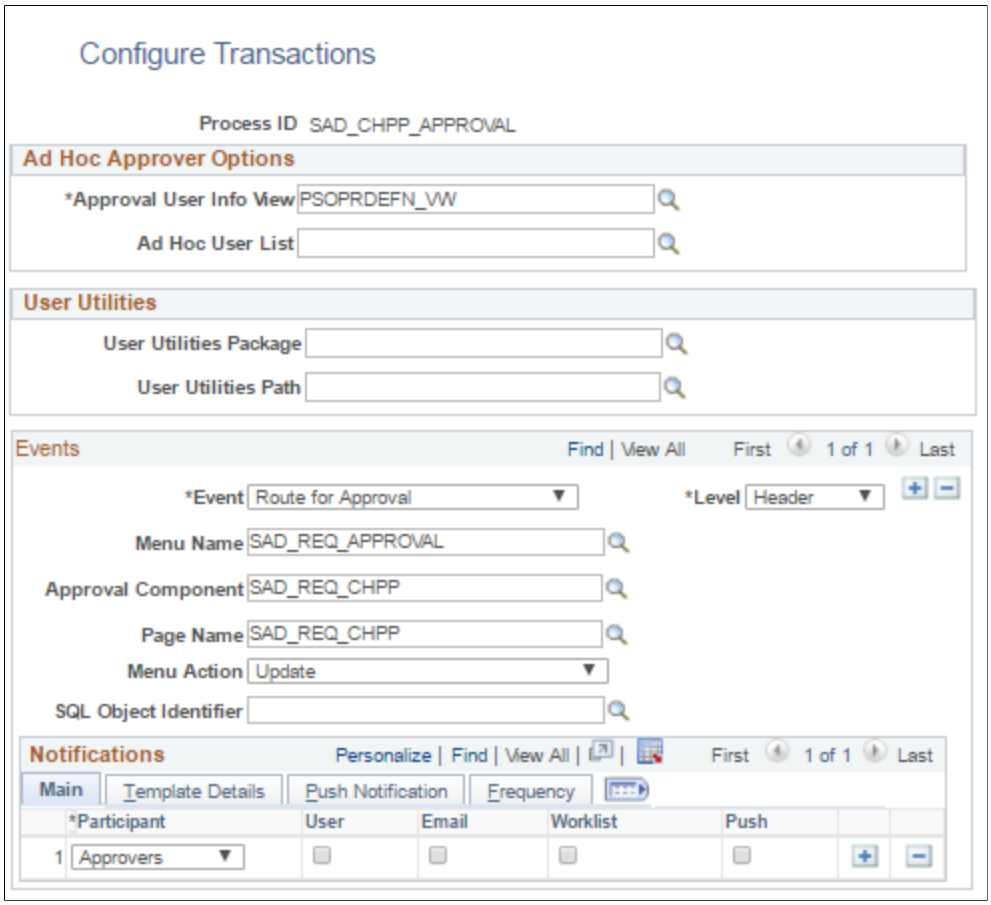
Image: Configure Transactions page for Change Program Plan Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Configure Transactions page for Change Program Plan Requests in Self Service Fluid User Interface.



Defining the Approval Definition Process

The approval process definition determines the flow of the approval. The approval process consists of stages, paths, and steps. Campus Solutions provides the following process definition setup for each process ID. Your institution may want to create its own definition IDs because it is at this level where approvers, notifications, and the process flow is defined. You associate the definition ID to one of the process IDs. On the Self Service Requests page, you associate the process and definition IDs to a sequence number under the high level keys Institution, Career, and Term. By linking the Definition ID to a sequence, you can customize which Approver User List to invoke for the workflow processing. If there are common attributes among the setup sequences, then one User List could certainly be reused.

For information about Approval Framework process definition, see *PeopleSoft Approval Framework*, Setting Up Approval Framework Process Definitions.

Campus Solutions provides the following

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Image: Setup Process Definitions page for Deferral Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Setup Process Definitions page for Deferral Requests in Self Service Fluid User Interface.

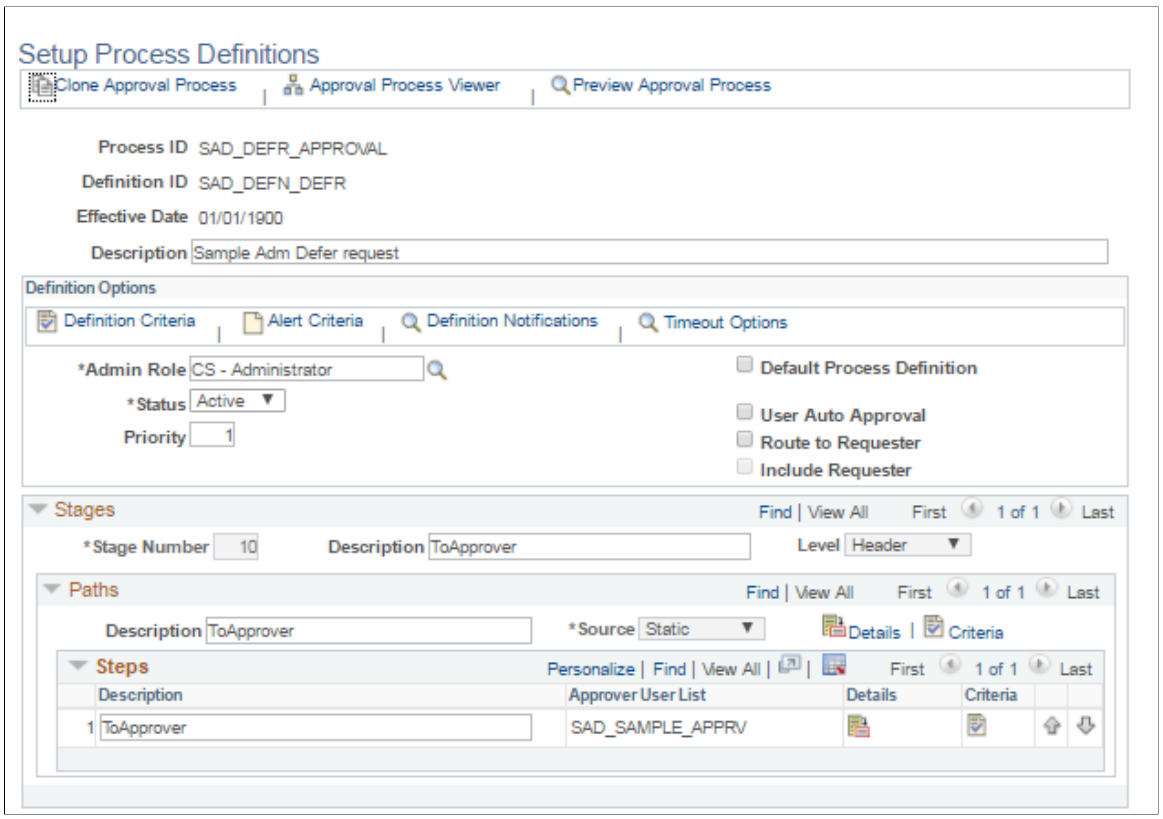

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Image: Setup Process Definitions page for Withdrawal Requests

This example illustrates the fields and controls on the Setup Process Definitions page for Withdrawal Requests.

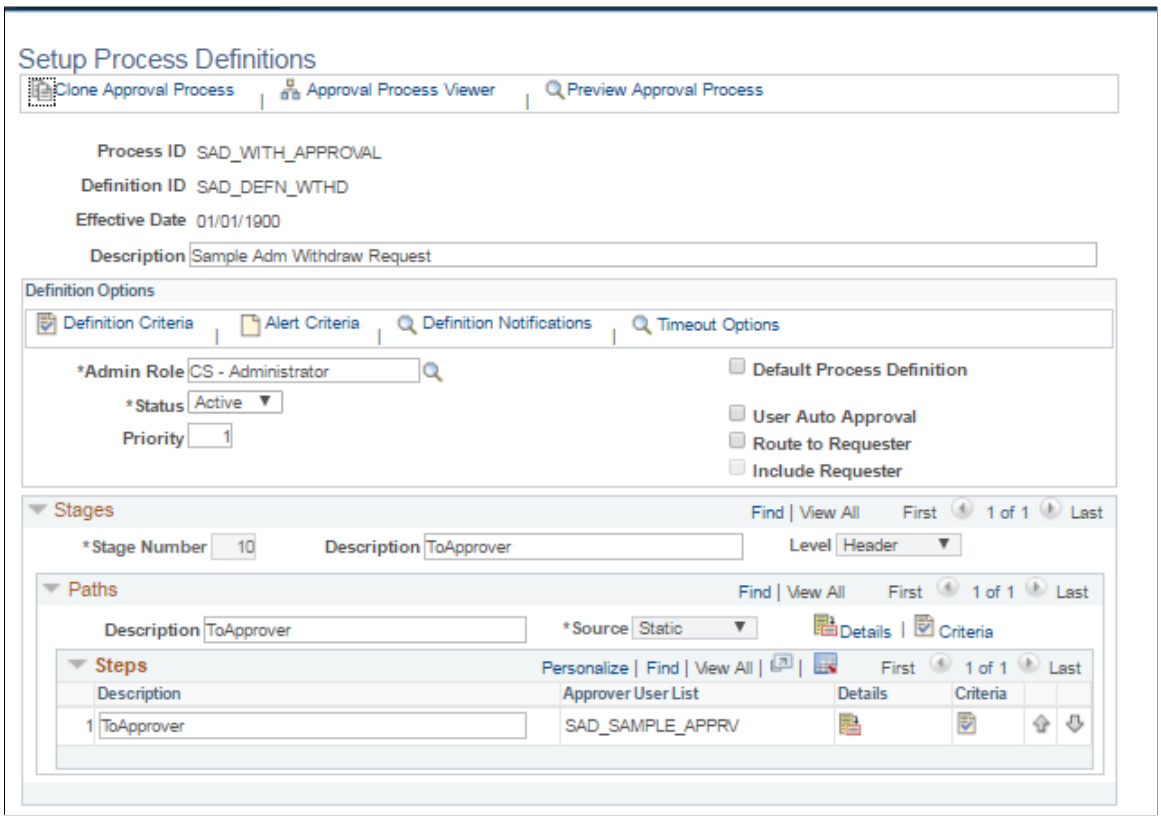

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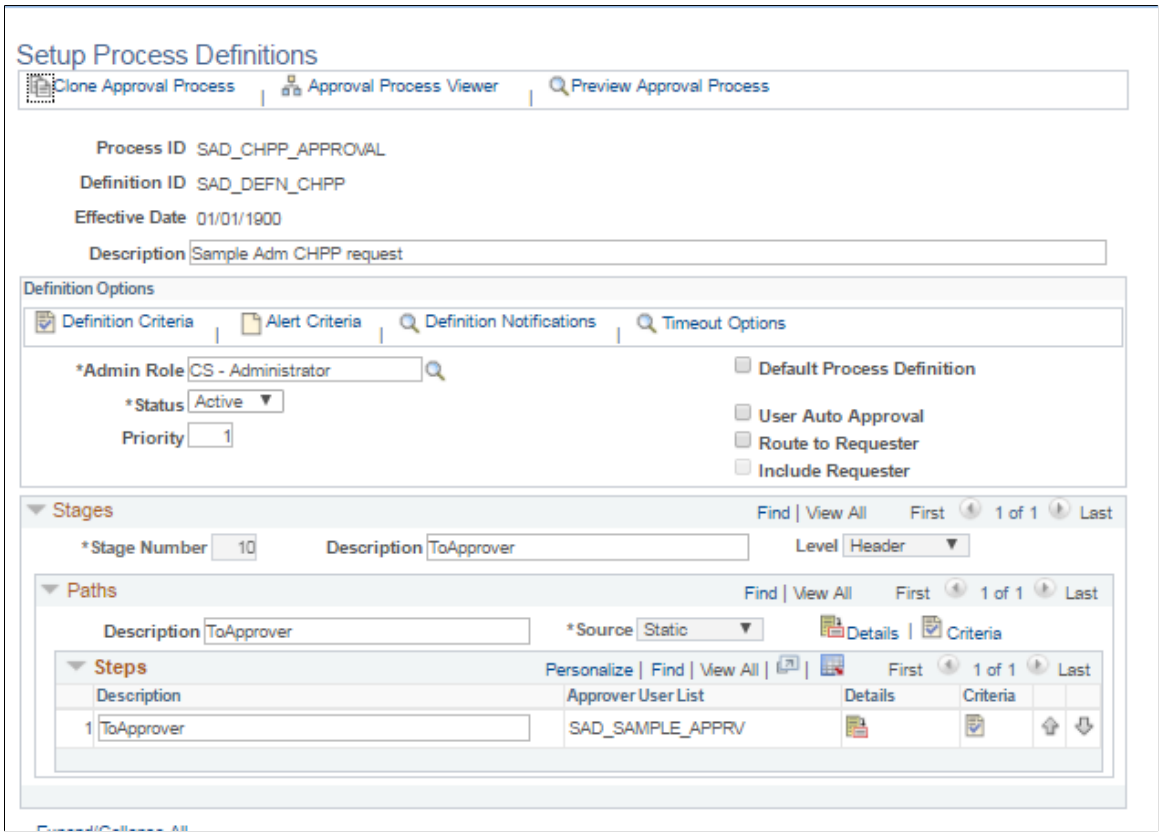
Image: Setup Process Definitions page for Change Program Plan Requests in Self Service Fluid User Interface

This example illustrates the fields and controls on the Setup Process Definitions page for Change Program Plan Requests in Self Service Fluid User Interface.



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Chapter 9

Setting Up Academic Advisement Self-Service

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 and Advising Notes Categories and Subcategories.

Pages Used to Set Up Self-Service Features for Academic Advisement

Page Name	*Definition Name*	*Navigation*	*Usage*
Academic Advising Setup	SAA_SS_RPT_OPT	Set up SACR >Common Definitions >Self Service >Academic Advising	Enable self-service features and define behavior for self-service Academic Advisement functionality.
Note Category Table	SAA_NOTE_TYPE_TBL	Set up SACR >Product Related >Academic Advisement >Note Category Table	Update and maintain Advising Notes categories, and category access controls.
Note Subcategory Table	SAA_NOTE_STYPE_TBL	Set up SACR >Product Related >Academic Advisement >Note Subcategory Table	Update and maintain Advising Notes subcategories.
Note Category User Access	SAA_NOTE_USER_ACX.GBL	Set up SACR >Product Related >Academic Advisement >Note Category User Access	View and maintain access to advising note categories for individual users..

Defining Academic Advisement Setup

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

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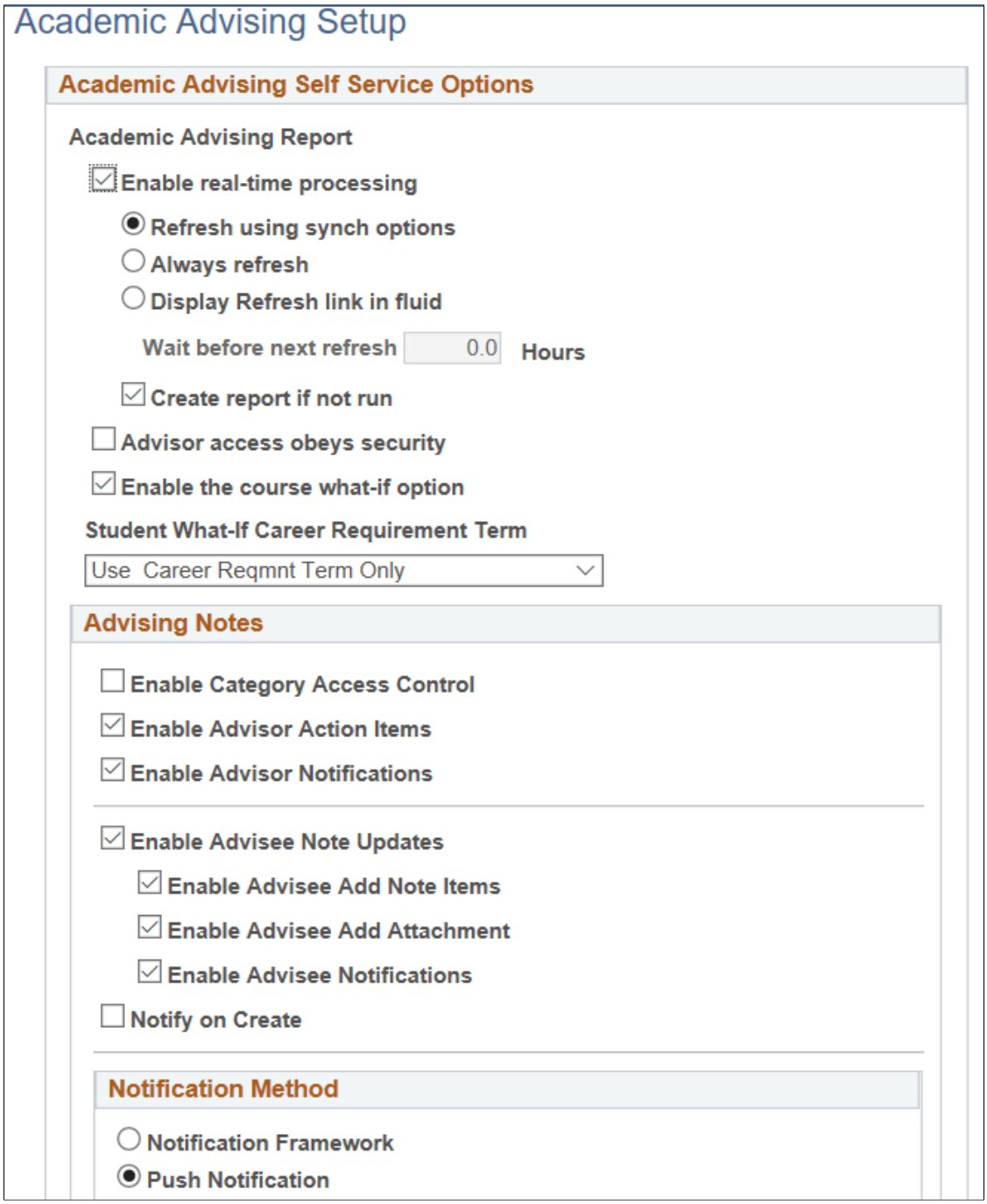
Image: Academic Advising Setup page

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, the Fluid Academic Progress Summary, and the Academic Progress and Course Requirement Alerts pages.

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

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If you enable real-time processing and select *Always refresh,* then the system regenerates 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. The *Always Refresh* setting works in conjunction with the *Wait before next refresh* on the Fluid Academic Progress Summary, Academic Progress and Course Requirement Alerts pages.

Select Display Refresh Link in Fluid to display a link on the Fluid Academic Progress Summary, Academic Progress and Course Requirement Alerts pages for the user to refresh Academic Advising report data. The link display is based on the value of the Wait before next refresh setting. You can set a value between 0.0 to 999.9 hours, where 0 hours ensures that the link is always displayed, and 0.1 hours would mean a waiting period of six minutes between two refresh actions.

The Wait before next refresh setting controls the wait period for both the Always Refresh and Refresh Button options in the Fluid pages.

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

Select the Create Report if Not Run check box to generate an advisement report if a matching report does not already exist. This feature applies to both classic self service and the Fluid user interface.

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.

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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.

Advising Notes

Enable Category Access Control Select the Enable Category Access Control check box to enable the Advising Notes Access Control feature.

Enable Advisor Action Items If enabled, the Action Items region is displayed and the column is included in Advising Notes lists. This is an initial setup value because turning off this feature would make existing data inaccessible.

Enable Advisor Notifications If enabled, the notify advisee button is displayed.

Enable Advisee Note Updates If enabled, the update note button is displayed. Disabling Advisee Note Updates disables all the following advisee features:

- Enable Advisee Add Note Items—the advisee can add note items such as comments.
- Enable Advisee Add Attachment—the advisee can add or delete attachments to the note but cannot delete the advisor's attachments.
- Enable Advisee Notifications—the advisor is automatically notified when the advisee submits an update.

Notify on Create If selected, the advisee is notified when an advising note is created for him or her.

Notification Method

Notification Framework Select this method to notify the advisee using the Notification Framework.

Push Notification Select this method to notify the advisee through the application in the form of alerts.

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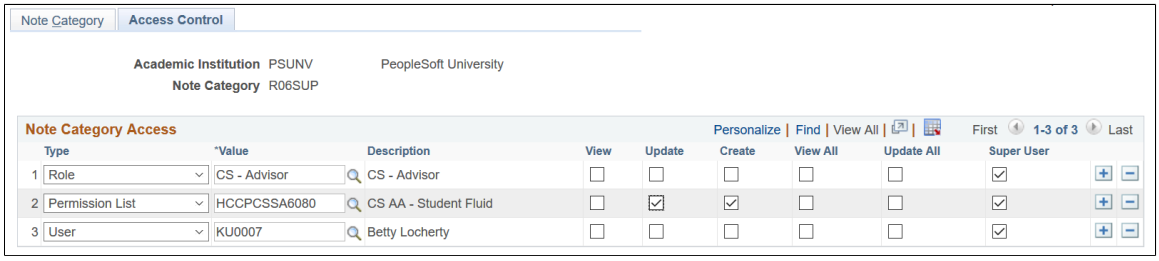
Defining Note Categories and Access Control

Use these pages to view and define Advising Note categories for your institution. You can create long and short descriptions for each category and change its active status. Use the Access Control page to set up access to a particular note category for primary permission lists, roles and individual user IDs.

Access the Note Category Table page (Set Up SACR >Product Related >Academic Advisement >Note Category Table/ >Access Control).

Image: Access Control page

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



Type Select a control based on type: Role, User or Permission List.

Value Select a value based on the selected type.

View Select to allow users to view notes created by themselves or assigned to them in this note category.

Update Select to allow users to view and update notes created by themselves or assigned to them in this note category.

Create Select to allow users to create notes in this note category.

View All Select to allow users to view all notes created by any user in this note category.

Update All Select to allow users to view and update all notes created by any user in this note category.

Super User Select to allow users to view and update all notes created by any user in this note category. A super user can also change categories, update Note Item text and delete notes in this note category.

Defining Note Subcategories

Use this page to view and define Advising Note subcategories for your institution. Subcategories are child values of Note categories. You can create long and short descriptions for each subcategory and change its active status.

Access the Note Subcategory Table page (Set Up SACR >Product Related >Academic Advisement).

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Related Links

"Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

"Defining Terms, Sessions, and Session Time Periods" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

"Understanding Academic Requirement Groups" (PeopleSoft Campus Solutions 9.2: Academic Advisement)

Viewing Advisee Information Through Self-Service Pages

"Creating and Managing Advising Notes" (PeopleSoft Campus Solutions 9.2: Academic Advisement)

Setting Up Note Category User Access

Use this page to view and maintain user-based advising note category access for a single user, and view access inherited from their primary permission list and roles.

Access the Note Category User Access page (Set Up SACR >Product Related >Academic Advisement >Note Category User Access).

Image: Note Category User Access page (1 of 2)

This example illustrates the fields and controls on the Note Category User Access page (1 of 2). You can find definitions for the fields and controls later on this page.

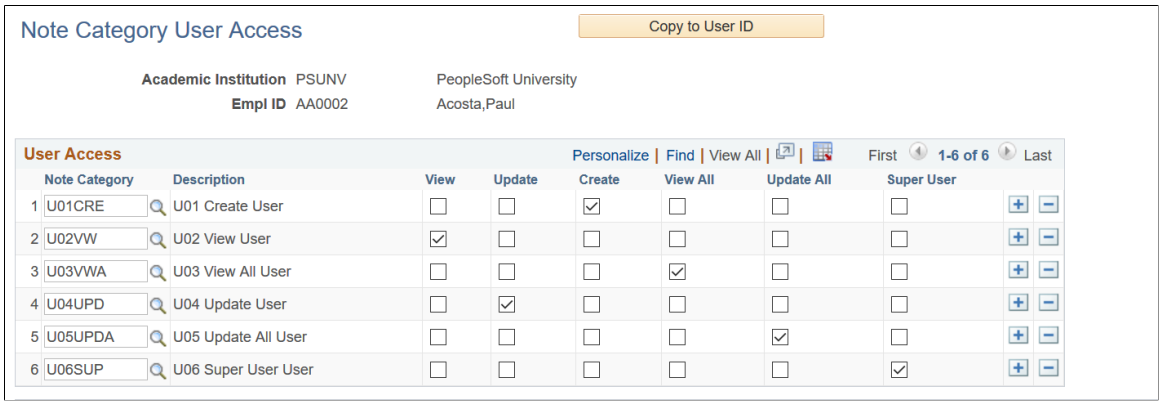
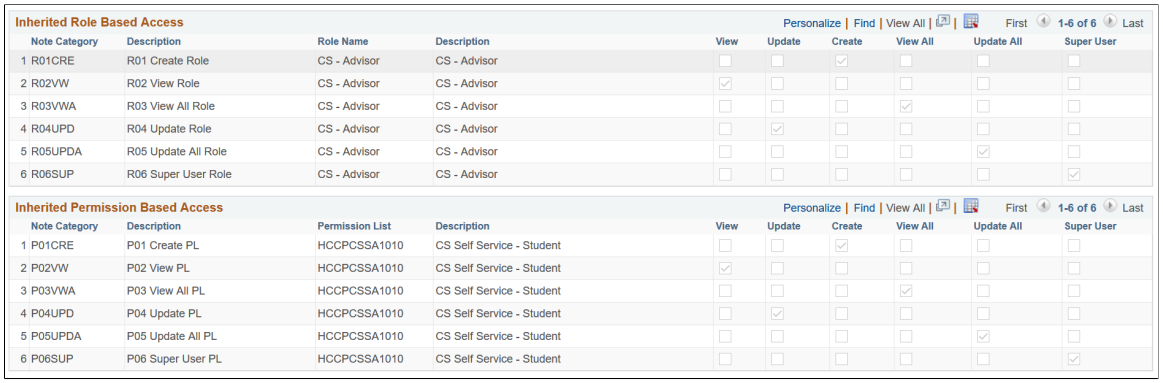


Image: Note Category User Access page (2 of 2)

This example illustrates the fields and controls on the Note Category User Access page (2 of 2).



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User Access	Add, update or delete User-based access control records. These records are the same as those in the Note Category Table–Access Control page.
Copy to User ID	Click the button to copy Note Category User Access records from one User ID to another. Existing values, if any, are overwritten.
Inherited Role Based Access	View Note Category Access inherited by the user based on PeopleSoft security roles. This data can only be edited on the Note Category Table–Access Control page.
Inherited Permission List Based Access	View Note Category Access inherited by the user based on PeopleSoft security permission lists. This data can only be edited on the Note Category Table–Access Control page.

When a user has multiple access records for the same Note Category, privileges assigned to the separate records are combined to give the most extensive access. For example, if the user has inherited a Note Category with Permission List access enabled for *Update All*, and User-based access to the same Note Category with *Update All* disabled, the system applies the *Update All* privilege for that note category.

Note: Permission List refers to the primary Permission List on the User profile.

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

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Academic Advisement	SAA_INSTALL_AA	Set Up SACR > Install > Academic Advising Installation	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.

Installing Self-Service Academic Advisement

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

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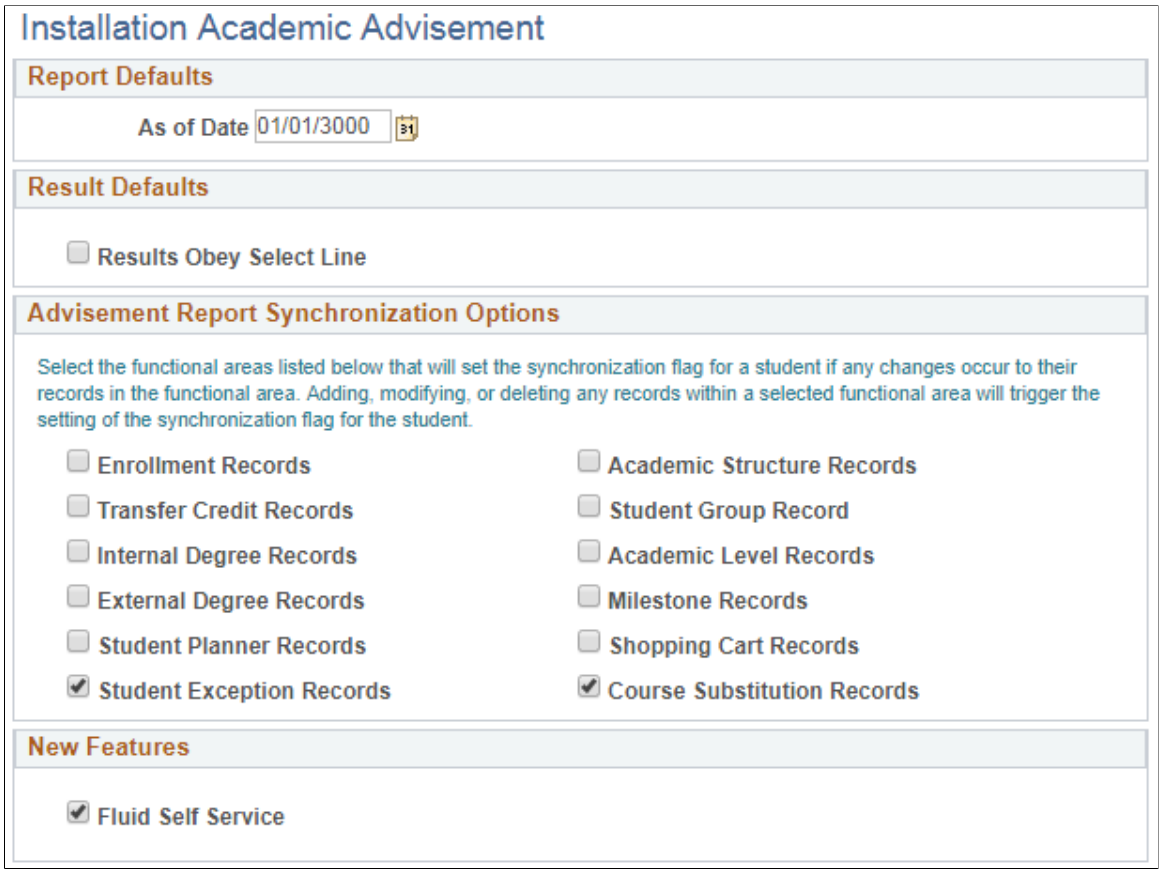
Image: Installation Academic Advisement page

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.



The check boxes on this page determine under which conditions a student's academic history causes 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 is 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, 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:

Enrollment Records	Adding, deleting, or modifying any enrollment records through Enrollment, Enrollment Requests, Quick Enrollment, or Grading.
Transfer Credit Records	Posting or unposting any transfer credit.
Internal Degree Records	Awarding, revoking, or modifying any degree record through the Student Program/Plan, Degree Maintenance, or Batch Graduation Processing pages.

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External Degree Records	Adding, modifying, or removing any externally awarded degrees through the External Education pages.
Student Planner Records	Adding, modifying, or removing any records from the student's planner.
Academic Structure Records	Adding, modifying, or removing any values from the student's Records Program stack. This also includes admissions matriculation.
Student Group Record	Adding, modifying, or removing any advisement student group values for a student.
Academic Level Records	Making any changes to a student's academic level, either by automated processes from grading and enrollment or through manual override in term processing.
Milestone Records	Adding, modifying, or removing any milestone values for a student.
Shopping Cart Records	Adding, modifying, or removing any records in the student's Shopping Cart.
Student Exception Records	Reprocessing when a student override is made. Specifically, the flag is set when any of the following types of student-based exceptions are created: course directive, requirement change, waiver, or override. The flag is also set when there is any change made to such an exception, whether it is a change to the description or to the override detail itself.
Course Substitution Records	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.

New Features

Fluid Self Service	Select to allow users to access the Enroll by My Requirements component in the Manage Classes tile (Student Home page). By default, this check box is deselected.

See Managing Classes Using PeopleSoft Fluid User Interface.

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).

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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.

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Chapter 10

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, birth date, 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

This section discusses how to:

- Set data to display on the Personal Data Summary page.
- Access personal data.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Pages Used to Display and Access Self-Service Personal Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Personal Data Summary Options	SSS_PRSN_SUM_SETUP	Set Up SACR > Common Definitions > Self Service > Personal Data Summary Options	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.
Personal Data Summary	SSS_PRSNLDATA_SUMM	Self Service > Campus Personal Information > Personal Data Summary	View a summary of links to your personal data, and view a list of your holds and to do's.

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).

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).

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.

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Configuring Profile Information for PeopleSoft Fluid User Interface

This section discusses how to set up profile pages for PeopleSoft Fluid User Interface.

Pages Used to Configure Profile Information for PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Navigation*	*Usage*
Personal Details Configuration	SCC_PERSON_DTLS_FL	Set Up SACR >Common Definitions >Self Service >Campus Community >Personal Details Configuration	Define which details appear on the Personal Details and Biographic Details pages.
Country Exclusions	SCC_CNTRY_EXCL_FL	Set Up SACR >Common Definitions >Self Service >Campus Community >Country Exclusions	Define the exclusion of Country and State values from Address prompts.
National ID Type	NID_TYPE_TABLE	Set Up Common Objects >Foundation Tables >Personal >National ID Type	Set up the National ID Type.
Type Control	TYPE_CNTL_SETUP	Set Up SACR >Common Definitions >Self Service >Type Control	Define which records appear and whether users can update the records. For more information, see Setting Up Type Control.
Org Defaults by Permission Lst	OPR_DEF_TBL_HR	Set Up Common Objects >Foundation Tables >Organization >Org Defaults by Permission Lst	Define defaults according to the user's primary permission list. When a new address is added, Country is used as a default and when a new name is added, the Name format is used.
Maintain Text Catalog	HR_SSTEXT_TEXT	Set Up Common Objects >Common Definitions >Text Catalog and Notepad >Maintain Text Catalog	Set up associated messages for various fields in the Text Catalog.
FERPA Control	FERPA_CONTROL	Set Up SACR >Product Related >Campus Community >Establish People Processing >Setup >FERPA Control	Review or make additional directory data and other information available to FERPA privacy control.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Self Service Ethnicity Setup	SCC_SS_ETHSTUP_USA	Set Up SACR >Common Definitions >Self Service >Self Service Ethnicity Setup	Allow and configure entry of ethnicity data on self service pages including the Profile functional area.

Defining Personal and Biographical Details

Access the Personal Details Configuration page (Set Up SACR >Common Definitions >Self Service >Campus Community >Personal Details Configuration).

Image: Personal Details Configuration page 1 of 2

This example illustrates the fields and controls on the Personal Details Configuration page 1 of 2.

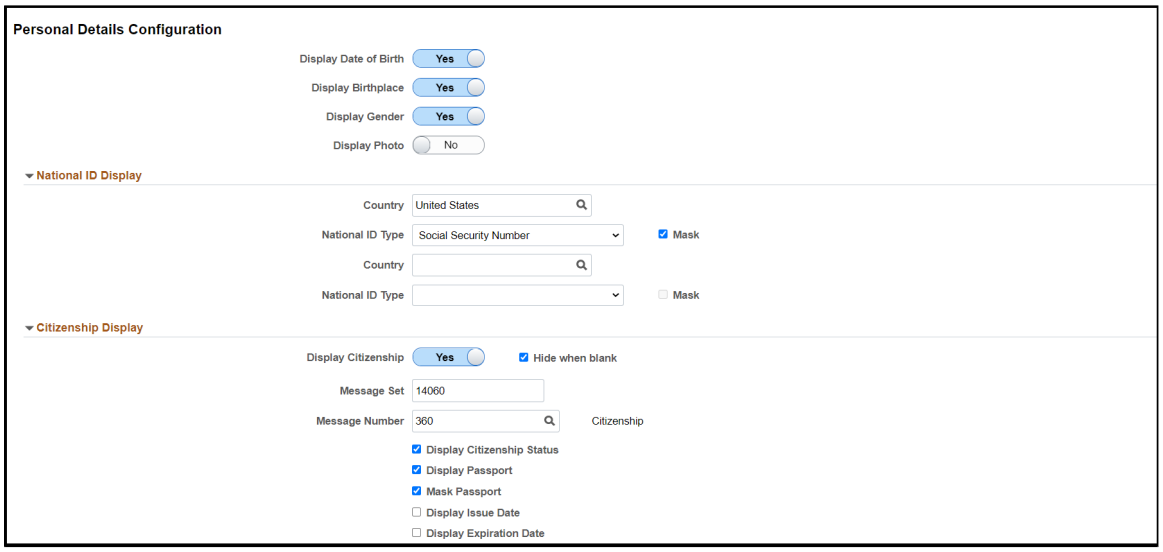
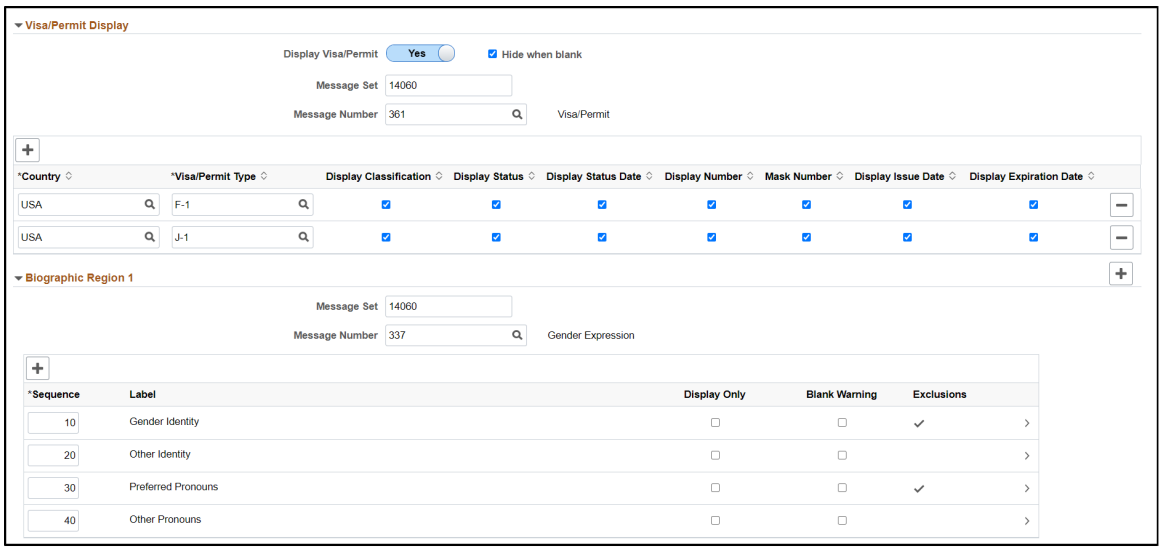


Image: Personal Details Configuration page 2of 2

This example illustrates the fields and controls on the Personal Details Configuration page 2 of 2.



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You can use this page to configure how data is displayed on the Personal Details and Biographic Details pages.

Use the toggle switch to select these fields to be displayed: Date of Birth, Birthplace, Gender, or Photo fields.

Note: If you select *Yes* for Birthplace, the birth location, state, and country values are displayed on the Personal Details page.

Empl ID always appears on the pages. You can configure Gender as a read-only field on the Personal Details page or as a read-only or updatable field on the Biographic Details page.

National ID Display

Country and **National ID Type**

Select the Country and the National ID Type to be displayed on the Personal Details page. The National ID fields are not displayed on the Personal Details page if a National ID Type is not defined, or if the user does not have an ID of the type defined.

Note: You can configure two National IDs.

For more information, see:

- "Defining National ID Types" (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Administering Country Codes" (PeopleSoft Campus Solutions 9.2: Campus Community)

Mask

Select the check box to mask the first five characters of the National ID on the Personal Details page. By default, the check box is cleared and is enabled only if National ID Type has a value.

See "Applying Demographic Data Access Security" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

Citizenship Display

Hide when blank

If selected, the region is hidden on the Personal Details page if there are no records to display

Visa/Permit Display

Hide when blank

If selected, the region is hidden on the Personal Details page if there are no records to display

Note: Only records for defined Visa/Permit Types are displayed on the Personal Details page.

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Biographic Regions

You can configure fields to appear in up to 12 Biographic Regions on the Fluid Biographic Details page. By default, only one region appears on the page. Click Add Field (plus sign icon) to add more regions, and the Delete row (minus sign icon) button to remove a region.

Use the Fields grids to define and organize the fields to be displayed. The fields available for display are: Birth Gender, Gender Identity, Other Identity, Preferred Pronouns, Other Pronouns, Sexual Orientation, Other Orientation, Biographical Attribute 1 to 9, Gender, Marital Status, Military Status, and Religious Preference.

A Biographic Region only appears on the Biographic Details page if at least one field is defined in it. If none of the regions have fields defined for them, the Biographic Details page is not displayed.

Define a Message Set, Message Number and Message Text field for each region.

Message Set — Define the Message Set number for the field label. This is a required setting if at least one field is defined in the grid.

Message Number — Define the Message Number for the field label. This field is only enabled if the Message Set field is defined.

Message Text — View the message text for the region label that appears on the Biographic Details page; for example, Gender Expression. Two sample messages are provided: 14060, 337 Gender Expression and 14060, 338 Demographic Information.

Add Field (plus sign icon) — Select the icon to add new fields. The icon only appears if there are fields available for selection in the particular region. A field cannot be used in more than one region.

Sequence — Assign a unique two–digit number that controls the display of the field. This is a required value.

Label — View the message text from the message catalog entry defined for the field. The maximum text limit is 100 characters but we recommend that you use 30 characters to avoid word truncation in the display.

Display Only — Select the check box to make the field read-only on the Biographic Details page. If the *Display Only,* check box is selected, the Blank Warning check box is cleared.

Blank Warning — Select the check box to determine whether a warning is displayed on the Biographic Details page if a field value is blank. You can select the check box only if the Display Only option is not selected.

Exclusions — Indicate whether exclusions have been defined for the field-where a value is not available for selection by students on the Biographic Details page. This allows values that are valid for use on the Personal page for administrative users, for example *Unknown*, to be excluded from the list of values available on the self-service page. A check mark indicates exclusions.

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Editing a Field Setting

Select any row in the grid to edit a field setting. You can edit the Message Set, Message Number and Sequence values. You can also change the setting of the Display Only and Blank Warning check boxes, which are by default, not selected. You can save changes or delete the field from the grid.

Click the Add Exclusions button to add exclusions for a field—translate values to be excluded from the list of available values for selection on the Biographic Details page. The Add Exclusion button does not appear if there are no active translate values associated with the field. If exclusions have been added for a field, they appear in a grid and you can click the plus button to add another exclusion. You can also delete exclusions using the minus button.

Note: For the Citizenship, Visa/Permit, Biographic Regions, the region titles on the Self-Service Profile pages are derived from the Message Text field in the Message Catalog setup. You can create, view, and make changes to the Message Catalog using the PeopleTools Message Catalog component (PeopleTools > Utilities > Administration > Message Catalog).

Note: : If the Other text field is included with the coded field, for example, both Gender Identity and Other Identity are included; then both should be included in the same region and the sequence values should be defined so that the fields appear together on the Biographic Details page. Ensure that the Display Only value is the same for both fields for consistent display.

You can configure Campus Community installation values for biographic fields for use on the Personal administration page. For more information, including details on setting up translate values and the setup required to use Biographic Attribute fields, see "Reviewing or Defining Campus Community Installation Settings" (PeopleSoft Campus Solutions 9.2: Campus Community).

See Also

- Using Self-Service Addresses, Names, Phones, and Demographic Data
- *PeopleTools: Applications User's Guide*, “Working With Fluid Pages and Controls”

Excluding Country and State Values from Addresses

Access the Country Exclusions page (Set Up SACR >Common Definitions >Self Service >Campus Community >Country Exclusions).

Use this page to exclude any country or state value from Address prompts. The Country Exclusions grid is prepopulated with Netherlands Antilles (ANT) and Yugoslavia (YUG), with the Address Exclusion check box selected.

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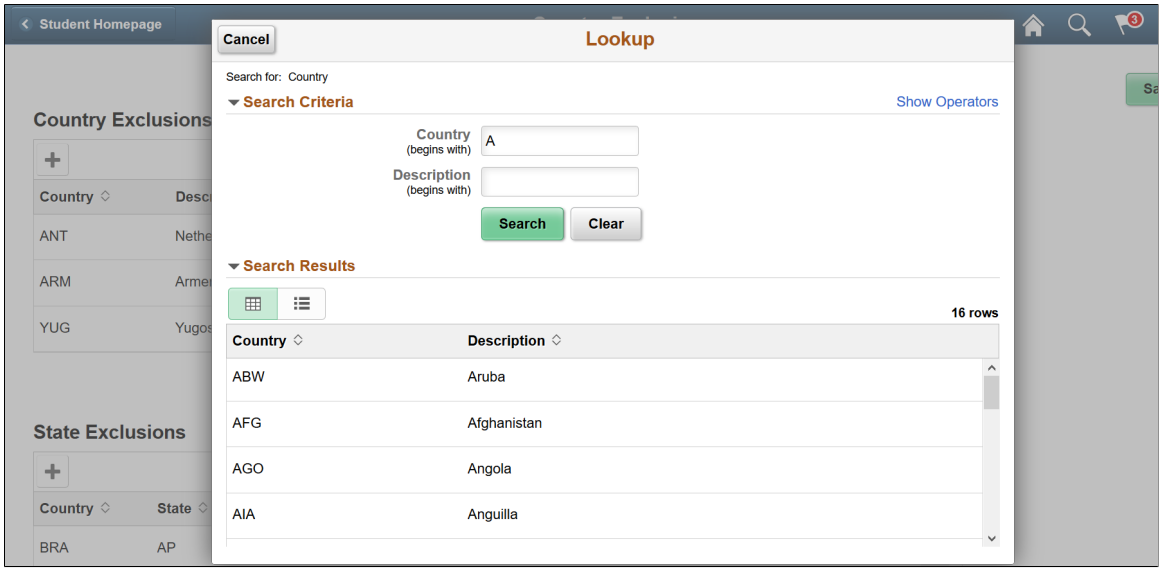
Image: Country Exclusions page- Lookup

This example illustrates the fields and controls on the Country Exclusions page- Lookup feature.



You can add or delete a row from the grid using the plus and minus icons. When adding a country or state, you can use the Lookup page to search for the value to add. The Country Lookup prompt displays all records in the Country Table minus any Country values already defined in the Country Exclusions grid. Similarly, the State Lookup excludes any values set up in State Exclusions with Exclude from Addresses selected.

Note: In the State Lookup, existing filters for USA and CAN also apply. For USA, records without a numeric code are excluded; with the exceptions of AA, AE, AP, AS, GU, MP, PR, and VI. For CAN, records without a numeric code are excluded. Since these values are already excluded from the State Lookup prompt, you do not need to specifically set them up as exclusions.

Configuring Names, Contact Details, and Addresses

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

Use this page to set up the Name, Address, Phone, and Email types that users can view, modify, or delete.

Note: Address types not defined as *Do Not Display* appear in a separate grid on the Addresses page.

See Also

- Setting Up Type Control
- "Setting Up Additional Name Information" (PeopleSoft Campus Solutions 9.2: Campus Community)
- "Defining Address Types" (PeopleSoft Campus Solutions 9.2: Campus Community)

Configuring Ethnicity

Access the Maintain Text Catalog page (Set Up Common Objects >Common Definitions >Text Catalog and Notepad >Maintain Text Catalog). Use Text ID *ETHN* to create descriptions for the Ethnicity Information icons.

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See Defining Text Catalogs for Text Catalog setup details.

Text catalogs are delivered blank. If the message text is not defined, the information icon does not appear on the Profile page. You can define text for the Ethnic Background page based on whether or not the page can be updated. If the page is display-only (based on Self Service Ethnicity Setup), you can provide a hyperlink to contact the appropriate person/office.

See "Setting Up Self-Service Ethnicity Reporting" (PeopleSoft Campus Solutions 9.2: Campus Community) for details.

Configuring Privacy Restrictions

Access the FERPA Control page (Set Up SACR >Product Related >Campus Community >Establish People Processing >Setup >FERPA Control) to organize the Fluid Privacy Restrictions page. Use Text ID *FERPA* to create descriptions for the Privacy Restrictions Information icons.

See "Making Data Available for FERPA Privacy Control" (PeopleSoft Campus Solutions 9.2: Campus Community) for details.

On the Privacy Restrictions page, you can configure the personal information to be restricted. You can create exceptions to the configured restrictions for Names, Addresses, Phones and Biographic Fields. See *Configuring Biographic Details* for more information.

Defining Text Catalogs

Access the Maintain Text Catalog page (Set Up Common Objects >Common Definitions >Text Catalog and Notepad >Maintain Text Catalog).

If you set up associated messages for a field in the Text Catalog, an Information icon appears beside the field. A user can select the icon to read relevant information. You can define Text catalog messages for the following fields in the Profile page:

Note: Text Catalog messages are associated with different Text IDs within the PRFL Sub ID: Ethnicity text catalog messages under *ETHN*, Privacy Restrictions under *FERPA* and the other catalog messages under *MAIN*. The Text ID TASKS, contains catalog messages for the Tasks pages.

Page Name	*Component Name*	*Panel Name*	*Field Name*
Personal Details Names	SCC_PERSON_DTLS_FL	SCC_PERS_DTLS_FL	SCC_PRFL_HLPIMG1 SCC_PRFL_HLPIMG2
View Name	SCC_PERSON_DTLS	SCC_NAMES_SCF	
Contact Details Email Phone	SCC_CONTCT_DTLS_FL	SCC_CONTACT_DTL_FL	SCC_PRFL_HLPIMG1 SCC_PRFL_HLPIMG2 SCC_PRFL_HLPIMG3
Addresses	SCC_ADDR_DTLS_F	SCC_ADDRESS_DTL_FL	SCC_PRFL_HLPIMG1
Add Address	SCC_ADDR_DTLS_F	SCC_ADDRESS_SCF	SCC_PRFL_HLPIMG2

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Page Name	*Component Name*	*Panel Name*	*Field Name*
Emergency Contacts	SCC_EMERG_CNTCT_FL	SCC_EMERG_CNTCT_FL	SCC_PRFL_HLPIMG1
Ethnicity IPEDS Ethnicity IPEDS First Question IPEDS Second Question Ethnic Background	SCC_ETHNIC_US_FL	SCC_ETHNIC_US_FL	SCC_PRFL_HLPIMG1 SCC_PRFL_HLPIMG2 SCC_PRFL_HLPIMG3 SCC_PRFL_HLPIMG4
Privacy Restrictions Exceptions	SCC_FERPA_RES_FL	SCC_FERPA_RES_FL	SCC_PRFL_HLPIMG1 SCC_PRFL_HLPIMG2
Biographical Details Gender Birth Gender Gender Identity Other Identity Sexual Orientation Other Orientation Preferred Pronouns Other Pronouns Marital Status Status Date Military Status Religious Preference Attribute 1 to Attribute 9	SCC_PERSON_DTLS_FL	SCC_BIOG_DTLS_FL	SCC_PRFL_HLPIMG3 SCC_PRFL_HLPIMG5 (GE) SCC_PRFL_HLPIMG5 (BG) SCC_PRFL_HLPIMG5 (GI) SCC_PRFL_HLPIMG6 (GJ) SCC_PRFL_HLPIMG5 (SO) SCC_PRFL_HLPIMG6 (SP) SCC_PRFL_HLPIMG5 (PP) SCC_PRFL_HLPIMG6 (PQ) SCC_PRFL_HLPIMG5 (MA) SCC_PRFL_HLPIMG4 SCC_PRFL_HLPIMG5 (MS) SCC_PRFL_HLPIMG5 (RP) SCC_PRFL_HLPIMG5 (XA to XI)
To Do List	SCC_TASKS_TODOS_FL	SCC_TODO_LIST_FL	SCC_PRFL_HLPIMG1
Holds	SCC_TASK_HOLDS_FL	SCC_HOLDS_LIST_FL	SCC_PRFL_HLPIMG1
Completed Agreements	SCC_TM_VW_AGREE_FL	SCC_TM_VW_AGREE_FL	SCC_PRFL_HLPIMG1

For more information, see "Create Text Message Category Functions" (PeopleSoft Campus Solutions 9.2: Campus Community).

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Managing Emergency Contacts Using PeopleSoft Fluid User Interface

This section discusses how to configure the settings for emergency contacts as well as adding or updating emergency contact information.

Pages Used to Manage Emergency Contacts Using PeopleSoft Fluid User Interface

Page Name	*Navigation*	*Definition Name*	*Usage*
Emergency Contact Configuration	Set Up SACR >Common Definitions >Self Service >Campus Community >Emergency Contacts Config	SCC_EC_CONFIG_FL	Configure the fields that appear on the Add and Edit Contact pages. The options on this page allow you to display the fields for adding addresses or other phone numbers.
Add Contact	Student Homepage >Profile >Emergency Contacts >Add Contact	SCC_EMERG_CNT_SCF	Add emergency contact information.
Edit Contact	Student Homepage >Profile >Emergency Contacts Select the contact you want to update.	SCC_EMERG_CNT_SCF	Update emergency contact information.

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 9.2: Application Fundamentals)

"Setting Up User Profiles Management" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Page Used for Self-Service User Preferences

Page Name	*Definition Name*	*Navigation*	*Usage*
User Preferences	SS_CC_USER_PREF	• Select the User Preferences link on the Personal Data Summary page • Self Service, Campus Personal Information, User Preferences	Enter default values for academic value and other elements required often by the system.

Using My Preferences in PeopleSoft Fluid User Interface

Use the delivered My Preferences tile on the Student Homepage to set default values and thereby minimize repetitive data entry. You can also access My Preferences from the Actions menu.

Pages Used for My Preferences

Page Name	*Definition Name*	*Usage*
Campus Preferences	SCC_CAMP_PREF_FL	Select and save default values for Institution, Career and Term. Also set up values for preferred language and method for communication.
General Settings	PTGP_USER_PERS_FL	Select and save default settings for General Options, Regional Settings, System & Application Messages, Navigation Personalizations, Pop-Up Notification and Advanced Settings.

Related Links

"Setting Up Preferences in PeopleSoft Fluid User Interface" (PeopleSoft Campus Solutions 9.2: Campus Community)

Using Campus Preferences

Define default values on the Campus Preferences page (SCC_CAMPUS_PREF_FL) for campus information and communication.

Defaults

Define default values for:

- Institution: Select from a list of all active institutions associated with the user.

  Changing the Institution value clears all the other fields.

- Career: Available values depend on the selected Institution value and the careers associated with the user.

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	• Term: Available only if Institution and Career values are selected. Values are based on the setup for the Institution and Career combinations. Only current or future terms are available for selection.
Communications	Define default values for communications. • Preferred Language • Preferred Method: Select a method, edit and save email addresses or phone numbers as required.

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 with required phone numbers.
- Demographic information, including gender, date and place of birth, marital status, and so on.

Related Links

"Designing Campus Community" (PeopleSoft Campus Solutions 9.2: Campus Community)
"Setting Up Emergency Contacts Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

Page Name	*Definition Name*	*Navigation*	*Usage*
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.
Delete Address	SS_UPDATE_ADDRESS	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.)	Delete an address type and associated data.
Names	SS_CC_NAME	• Click the Names link on the Personal Data Summary page. • Self Service > Campus Personal Information > Names > Names	View your current name types as permitted by the Type Control page, and the associated name data.
Change Name Add a new name	SS_CC_UPDATE_NAME	• Click theedit button on the Names page to access the Change Name page. • Click the ADD A NEW NAME button on the Names page to access the Add a new name page.	When accessed from the edit button, you can view or update the name type. When accessed from the ADD A NEW NAME button, you can add a name type and new name with a current for future effective date.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Phone Numbers	SS_CC_PERS_PHONE	• Click the Contact Information Description link on the Personal Data Summary page. • Click the ADD A PHONE NUMBER button on the Emergency Contact Detail page, and then select the phone type to edit or delete. • Self Service > Campus Personal Information > Phone Numbers	View and update your current phone types as permitted by the Type Control page, and phone numbers. Buttons on this page also enable you to add or delete rows to add or delete phone numbers.
Email Addresses	SS_CC_EMAIL_ADDR	• Click the Contact Information Email Address link on the Personal Data Summary page. • Self Service > Campus Personal Information > Email Addresses	View and update your current email address types as permitted on the Type Control page, and email addresses. Buttons on this page also enable you to add or delete rows to add or delete email addresses.
Internet Addresses	SS_CC_INTERNET_ADR	• Click the Internet Addresses link on the Personal Data Summary page. • Self Service > Campus Personal Information > Internet Addresses	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.
Emergency Contacts	SS_CC_EMRG_CNTCT_L	• Click the Emergency Contacts link on the Personal Data Summary page. • Self Service > Campus Personal Information > Emergency Contacts	View the name, address, and phone numbers for your emergency contact.
Emergency Contact Detail	SS_CC_EMRG_CNTCT_D	Click the ADD AN EMERGENCY CONTACT button on the Emergency Contact page.	Add an emergency contact for yourself, and enter the contact information.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Demographic Information	SS_CC_DEMOG_DATA	• Click the Demographic Data link on the Personal Data Summary page. • Self Service > Campus Personal Information > Demographic Information	View a summary of your demographic data such as your date of birth, gender, marital status, national ID, and so on. **Note:** If a photo is loaded into the system from the Photograph page in PeopleSoft Campus Solutions, that photo appears in the upper right on this page. See "Entering Photographs" (PeopleSoft Campus Solutions 9.2: Campus Community).
FERPA Restrictions	SS_CC_FERPA_INQ	• Click the FERPA Restrictions link on the Personal Data Summary page. • Self Service > Campus Personal Information > FERPA Restrictions	View data that you have restricted from being released.
Edit FERPA/Directory Restrictions	SS_CC_FERPA	Click the EDIT FERPA DIRECTORY RESTRICTIONS button on the FERPA Restrictions page.	Place restrictions to prevent the release of data about yourself.
Release To Publication	INST_PUB_CATG_SEC2	Click the Release To Publication link on the Edit FERPA/Directory Restrictions page. (The link appears only when the Restrict check box is selected.)	Release restricted information for inclusion in specific internal directory publications.

Using Self-Service Personal Attributes Data

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

Languages are set up in PeopleSoft 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.

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Related Links

"Setting Up Personal Attributes" (PeopleSoft Campus Solutions 9.2: Campus Community)

Pages Used for Self-Service Personal Attributes

Page Name	*Definition Name*	*Navigation*	*Usage*
Languages	SS_CC_LANGUAGES_L	• Click the Languages link on the Personal Data Summary page. • Self Service > Campus Personal Information > Languages	View or edit a list of the languages that you read, write, or speak and the proficiency with which you read, write, or speak them.
Language Detail	SS_CC_LANGUAGES_D	• Click the name of the language on the Languages page to access a view-only version of the Language Detail page. • Click the edit button on the Languages page to access an updatable version of the Language Detail page. • Click theADD A LANGUAGE button on the Languages page to access and enterable version of the Language Detail page.	When you access this page from the name of the language, view details of that language and your proficiency. When you access this page using the edit button, view and modify details of that language and your proficiency. When you access this page using the ADD A LANGUAGE button, add a language to your list of languages.
Notification Preferences	SS_CC_NTF_PREF	• Click the Notification Preferences link on the Personal Data Summary page. • Self Service > Campus Personal Information > Notification Preferences	View and edit notification preferences.
Ethnicity	SS_CC_ETHNICITY_US	• Self Service > Student Center > Demographic Data link > Ethnicity • Self Service > Faculty Center > View Personal Data Summary link > Demographic Data link > Ethnicity tab • Self Service > Campus Personal Information > Personal Data Summary link > Demographic Data link > Ethnicity tab	Students, staff, and faculty identify their ethnicity and enter details about their racial background.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Self Service Help	SS_CC_ETH_HELP_PG	Click the Explain link on the Ethnicity page.	Students, staff, and faculty review ethnicity definitions from the National Center for Education Statistics (NCES) website.

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 is 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 appear 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 is 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 are 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.

For information on IPEDS ethnicity, including data examples, see *IPEDS Red Paper* in My Oracle Support (ID 837237.1).

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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 9.2: Campus Community).

Page Used for Self-Service Identification Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Personal Identification Number	SS_CC_PIN	• Click the Personal Identification Number link on the Personal Data Summary page. • Self Service > Campus Personal Information > Personal Identification Number	Create a personal identification number for yourself.

Using Self-Service Participation Data

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

Participation data is set up in 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 9.2: Campus Community)

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Pages Used for Self-Service Participation Data

Page Name	*Definition Name*	*Navigation*	*Usage*
License and Certificates	SS_CC_LIC_CERT_L	• Click the Licenses/ Certificates link on the Personal Data Summary page. • Self Service > Campus Personal Information > Licenses and Certificates	View a list of your licenses and certificates.
License/Certificate Detail	SS_CC_LIC_CERT_D	• 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. • Click the edit button on the License and Certificates page to access an updatable version of the License/ Certificate Detail page. • Click the ADD A LICENSE/ CERTIFICATE button on the Licenses and Certificates page to access an enterable version of the License/ Certificate Detail page.	When you access this page from the name of the license or certificate, view details about that license or certificate. When you access this page using the edit button, view or modify details about that license or certificate. When you access this page using the ADD A LICENSE/ CERTIFICATE button, add another license or certificate to your list of licenses and certificates.
Memberships	SS_CC_MEMBER_L	• Click the Memberships link on the Personal Data Summary page. • Self Service > Campus Personal Information > Memberships	View a list of your memberships.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Membership Detail	SS_CC_MEMBER_D	• Click the name of the membership on the Memberships page to access a view-only version of the Membership Detail page. • Click the edit button on the Memberships page to access an updatable version of the Membership Detail page. • Click the ADD A MEMBERSHIP button on the Memberships page to access an enterable version of the Membership Detail page.	When you access this from the name of the membership, view details about that membership. When you access this page using the edit button, view or modify details about that membership. When you access this page using the ADD A MEMBERSHIP button, add another membership to your list of memberships.
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 > Academic Honors and Awards	View a list of your academic honors and awards. **Note:** Self service users can view academic honors and awards information, but they cannot enter, modify, or update it.
Publications	SS_CC_PUB_L	• Click the Publications link on the Personal Data Summary page. • Self Service > Campus Personal Information > Publications	View a list of your publications.

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Page Name	Definition Name	Navigation	Usage
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

Page Name	Definition Name	Navigation	Usage
Work Experience	SS_CC_WORK_EXP_A	• Click the Work Experience link on the Personal Data Summary page . • Self Service, Campus Personal Information, Work Experience	View a list of your work experience.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Employment Details	SS_CC_WORK_EXP	• Click the name of the work experience on the Work Experience page to access a view-only version of the Employment Details page. • Click the edit button on the Work Experience page to access an updatable version of the Employment Detail page. • Click the ADD A WORK EXPERIENCE button on the Work Experience page to access an enterable version of the Employment Details page.	When you access this page from the name of the work experience, view details of that work experience. When you access this page using the edit button, view and modify details of that work experience. When you access this page using the ADD A WORK EXPERIENCE button, add a work experience to your list of work experiences

Using Self-Service Service Indicators Data

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

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 9.2: Campus Community)
"Understanding Service Indicators" (PeopleSoft Campus Solutions 9.2: Campus Community)

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Pages Used for Self-Service Service Indicators Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Your Holds	SS_CC_HOLDS	Self Service > Campus Personal Information > Holds	View holds placed on services for yourself and determine how and when to resolve them.
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 in both the classic and fluid user interfaces. The To Do List link under Campus Personal Information in the classic interface, enables self-service users to assume responsibility for viewing and resolving their own pending checklist items.

When you set up Personal Data Summary Options for Campus Self Service, you can choose how many to-do items to display in the classic interface. No additional setup is required for self service.

In the PeopleSoft Fluid User Interface, you can use the Tasks tile to view your To Do list and Holds, and complete your checklist items. You can view agreements completed through activity guides if you have at least one completed agreement record and security access to the Completed Agreement page. For more information, see "Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

This section lists the pages used for self-service checklists data.

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Pages Used for Self-Service Checklists Data

Page Name	*Definition Name*	*Navigation*	*Usage*
To Do List	SS_CC_TODOS	Self Service >Campus Personal Information >To Do List	View your pending checklist items using a classic interface 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 Understanding Student Activity Guides.
To Do Item	SS_CC_TODOS_SEC	• 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.	View information about a specific checklist item on a classic interface and determine what is required and whom to contact.

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Page Name	Definition Name	Navigation	Usage
Tasks	NA	Select the Tasks tile on the Homepage.	On a Fluid interface, • View and complete the total number of To Do items—tasks (activity guide instances) and — checklist items. • View the number of Holds. Display of these totals is based on the criteria defined for the display of To Do items. • View completed agreements on the Completed Agreements page. These are agreements completed through activity guides. Display depends on whether a user has at least one completed agreement and has security access to the Completed Agreements page. See "Configuring Tasks" (PeopleSoft Campus Solutions 9.2: Campus Community)

Note: You can view completed agreements on a desktop or laptop and select Print to print them using the default print options for the device. You cannot print from a mobile phone.

Related Links

"Understanding Checklist Setup" (PeopleSoft Campus Solutions 9.2: Campus Community)
"Understanding Checklists" (PeopleSoft Campus Solutions 9.2: Campus Community)

(AUS) Accessing USI Information

This topic discusses how students can verify their Unique Student Identifiers (USI).

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Page Used to Access USI Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Campus Personal Information- Unique Student Identifier	SS_CC_PERS_USI	Self Service >Campus Personal Information >Unique Student Identifier	Verify USI information.

Verifying a Unique Student Identifier

Use the Unique Student Identifier page (SS_CC_PERS_USI) to verify Unique Student Identifier (USI) information.

Access the Unique Student Identifier page (Self Service >Campus Personal Information >Unique Student Identifier). Click the Enter Your USI button. If the student has a USI National ID value for the National ID Type field on the USI Setup page, it is displayed without other Personal Details.

Unique Student Identifier Enter the existing USI created on the USI website or from previous study at another institution. Your entry is validated by the USI check digit algorithm contained in the field.

Name Enter the student's name: either single name; or the first, middle and family names.

Process Later Save the record and process it later in a bulk process.

Submit Submit the USI and student details for immediate verification using the USI web service.

The Verify USI web service verifies the USI in association with the student's name and date of birth. If the submit process is successful, a new National ID record is created for the USI.

Customizing USI Messages

The system displays customizable descriptions of the USI field and its entry requirements. It also displays different messages for each USI submission status:

- USI already exists
- USI in process
- USI submission valid
- USI submission invalid. This can be further clarified as USI deactivated or USI records do not match.
- USI submission returned an error.

Create and store messages for the USI field and each USI status using the message catalog tool (Main Menu >PeopleTools >Utilities >Administration >Message Catalog).

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Chapter 11

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 classic 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

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

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

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Chapter 12

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

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Pages Used to Request Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Request Admission Materials	ADM_WEB_PRS_INTRO	• Self Service > Student Admission > Request Information • Self Service > Request Information	Visitors view introductory text about requesting admission materials, such as how to move from page to page and how to prompt for values.
Request Information	ADM_WEB_PRS_CAR	Click the Next button on the Request Admission Materials page.	Visitors add, delete, or edit the academic careers for which they want to request information. **Note:** Only academic programs, plans, and subplans with a Last Prospect Date greater than the system date or blank are available.
Request Information—I am Interested in Attending	ADM_WEB_PRS_CAR_SP	Click the Add button on the Request Information page.	Visitors enter academic career, academic information, school information, and academic program information, depending on your setup in the Web Prospect Setup page.
Academic Interests	ADM_WEB_PRS_INT	Click the Next button on the Request Information page.	Visitors can select their academic interests. This page appears to visitors if you enable this segment on the Web Prospect Setup page.
Test Results	ADM_WEB_PRS_TST	Click the Next button on the Academic Interests page.	Visitors can enter test results. This page appears to visitors if you enable this segment on the Web Prospect Setup page.
Test Results	ADM_WEB_PRS_TST_SP	Click the Add button on the Test Results page.	Visitors add test details, such as test name, scores, percentiles, and dates.
Submit	ADM_WEB_PRS_SUB	Click the Next button on the Test Results page.	Visitors submit the request.
Your request for information has been processed	ADM_WEB_PRS_END	Click the Submit button on the Submit page.	Visitors view a message confirming that their request was successfully submitted.

Accepting or Declining Admission

Using self-service classic user interface, applicants can view their application status, and accept or decline admission.

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You can edit the text messages on both the Accept Admission and Decline Admission self-service classic pages. 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

Page Name	***Definition Name***	***Navigation***	***Usage***
Accept Admission	SS_ADM_ACCEPT	• Self Service > Student Admission • Self Service > Admissions	This page appears if the applicant has no application to accept or decline.
Accept Admissions–Select Application	SS_ADM_ACCEPT2	• Self Service > Student Admission • Self Service > Admissions	Applicants can select the application that they want to accept or decline. If an applicant was admitted to multiple academic careers or academic programs, each application appears on this page.
Accept or Decline Admission	SS_ADM_ACC_DEC	Click the Accept/Decline link for the application that you want to process.	Applicants select whether they want to accept or decline admission.
Confirm Acceptance	SS_ADM_ACCEPT3	Click the I Accept Admission button on the Accept or Decline Admission page.	Applicants can confirm their acceptance.
Admittance Accepted	SS_ADM_ACCEPT4	Click the Confirm Acceptance button on the Confirm Acceptance page.	This page appears to show that the applicant's selection has been processed.
Confirm Decline	SS_ADM_DECLINE1	Click the I Decline Admission button on the Accept or Decline Admission page.	Applicants can confirm that they want to decline admission.

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Page Name	Definition Name	Navigation	Usage
Admission Declined	SS_ADM_DECLINE2	Click the Confirm Decline button on the Conform Decline page.	This page appears to show that the applicant's selection has been processed. Also, applicants can enter a the reason they declined admission and the institution they chose to attend. Applicants can select the institution from the prompt, or they can enter the institution in the free-from field if you selected Free Form Institution on the Installation Defaults - AD page. The information the applicant enters on this page posts to the Application Student Response page in the Application Maintenance component.

Viewing Application Status

This section discusses how applicants view their application status through Self Service classic user interface.

Page Used View Application Status

Page Name	Definition Name	Navigation	Usage
Application Status	SS_ADM_APP_STATUS	• Self Service > Student Admission • Self Service > Admissions • Self Service >Student Center. In the Admissions section (My Applications region) of Student Center, click View Status.	Applicants can view the status of their applications.

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 shows as *Complete*. If the check box is not selected, the status shows as *Incomplete*. This check box setting can be updated manually or by using the Population Update process for ADM_APPL_DATA.

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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 Configuring Self Service Display for Applicants.

Managing Applications Using PeopleSoft Fluid User Interface

Applicants can perform the following tasks using Applicant Self Service in PeopleSoft Fluid User Interface:

- Track application status (incomplete or complete)
- Access information about an application's status and the requirements to support an application. If applicants require more information or have questions, they can also obtain contact information.
- View the admissions decision, when available, and view the decision letter
- Create or view requests to defer admission, withdraw an application, or change an application program or plan
- Accept or decline the offer of admission, if admitted
- Change the response to an admission offer, if applicants have previously declined or accepted one
- Accept or decline an offer to be wait-listed
- Upload a document in the process of admission
- Pay an admission deposit

Important! How you set up the various elements in the Admissions tile determines what applicants can view in PeopleSoft Fluid User Interface. See Configuring Self Service Display for Applicants.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Pages Used to Manage Applications Using PeopleSoft Fluid User Interface

Page name	*Definition Name*	*Usage*
Admissions Tile	SAD_APPL_TILE_FL	Access the Application Status and Requests pages.
Select a Value	SAD_APPL_SELECT_FL	Select and view an application. This page appears when an applicant has multiple applications.

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Page name	*Definition Name*	*Usage*
Application Status	SAD_APPL_STATUS_FL	From the Application page, you can: • view application status, its related information, decision letter and institution contact information • change your response to an admission offer • accept or decline an offer to be wait-listed From the To Do List page, you can view checklist items for each application and its status. Select a row for more information about each item. If the application requires you to submit a document, click the Upload File button. To enable file uploads, see "Enabling File Uploads for Applications in Fluid User Interface" (PeopleSoft Campus Solutions 9.2: Campus Community). If you have multiple applications, click the Change button to view other applications.
Requests	SAD_APPL_REQ_FL	View requests you have created or create a new request to defer admission, withdraw an application, or change an application program or plan. When you create a request to defer admission, you must upload valid documents to support your request for deferral.
Accept/Decline Admissions	SAD_MODAL_AD_SCF	Accept or decline the offer of admission. Accept and Decline buttons appear on the page when an application is in Admitted status.

Depending on the setup, the View Decision Letter link appears on the Application tab. Click the link to view a PDF version of the letter in the device’s native client.

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Chapter 13

Using Student Center

Understanding Self-Service Student Center

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

From the Student Center, students access any student related transaction that is available from Campus Self Service. You can use the Student Center Options page and security setup to control which sections and transactions appear on the Student Center.

The 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.

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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 are 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

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Center	SSS_STUDENT_CENTER	Self Service, Student Center	Students use this page to access student related transactions and to view important information, such as class schedule, dates, and account information.

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Chapter 14

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 9.2: Campus Community)

Searching for Classes Using Classic Self-Service Pages

Prerequisites for Using Academic Advisement Self Service

"Understanding Gradebook" (PeopleSoft Campus Solutions 9.2: 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.

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Pages Used for the Self-Service Faculty Center

Page Name	*Definition Name*	*Navigation*	*Usage*
My Schedule	INSTR_CLASS3	Self Service > Faculty Center > My Schedule	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.
Class Detail	SSR_CLSRCH_DTL	Click a class link within My Teaching Schedule on the My Schedule page.	Instructors can view the details of the classes in their schedules.
Textbook Summary	SSR_SSCLSTXB_SUM	Click the View Textbook Summary link of the Faculty Center, My Schedule page.	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).
View My Weekly Schedule	SSR_SSINSTR_WEEK	Click the View Weekly Teaching Schedule link on the My Schedule page. Click the View Weekly Exam Schedule link on the My Schedule page.	Instructors can view their weekly teaching and exam schedules in a grid format.
Personal Data Summary	SSS_PRSNLDATA_SUMM	Click the View Personal Data Summary link on the My Schedule page.	Instructors can view a summary of links to their personal data.
Class Roster	SS_FAC_CLASS_ROST	• Self Service > Faculty Center > Class Roster • Self Service > Faculty Center > My Schedule Click the Class Roster icon on the My Schedule page or click the Class Roster subtab.	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.

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Page Name	Definition Name	Navigation	Usage
Grade Roster	SS_GRADE_ROSTER	• Self Service > Faculty Center > Grade Roster • Self Service > Faculty Center > My Schedule Click the Grade Roster icon on the My Schedule page or click the Grade Roster subtab.	Instructors view or enter grades, update the roster's approval status, and post grades.
Gradebook	LAM_CLASS_GRADES	• Self Service > Faculty Center > Gradebook • Self Service > Faculty Center > My Schedule Click the Gradebook icon on the My Schedule page or click the Gradebook subtab.	Enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting.
Class Assignments	LAM_CLASS_ACTIVITY	• Self Service > Faculty Center > Assignments • Self Service > Faculty Center > My Schedule Click the Assignments icon on the My Schedule page or click the Assignments subtab.	Create, review or edit Gradebook class assignments.
My Advisees	SSS_ADVISEE_LIST	Self Service > Advisor Center > My Advisees	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.
Advisee Student Center	SSS_STUDENT_CENTER	• Self Service > Advisor Center > Advisee Student Center • Self Service > Advisor Center > My Advisees Click View Student Details on the My Advisees page for an advisee or click the Student Center subtab.	Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information.

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Page Name	Definition Name	Navigation	Usage
Advisee General Info	SCC_SUM_PERSONAL	• Self Service > Advisor Center > Advisee General Info • Self Service > Advisor Center > My Advisees Click View Student Details for an advisee on the My Advisees page. Click the General Info subtab.	Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.
Advisee Transfer Credit	SCC_SUM_TRNSFRCRDT	• Self Service > Advisor Center > Advisee Transfer Credit • Self Service > Advisor Center > My Advisees Click View Student Details on the My Advisees page for an advisee. Click the Transfer Credit subtab.	Advisors can view information such an advisees's course and test credits.
Advisee Academics	SCC_SUM_ACADEMICS	• Self Service > Advisor Center > Advisee Transfer Credit • Self Service > Advisor Center > My Advisees Click View Student Details on the My Advisees page for an advisee, Click the Academics subtab.	Advisors can view information such as an advisee's career, program, and term summary.
Search for Classes	SSR_CLSRCH_ENTRY	Self Service > Search > Class Search	Instructors can search for classes.
Browse Course Catalog	SSS_BROWSE_CATLG	Self Service > Search > Browse Course Catalog	Instructors can browse the course catalog to see a list of courses offered at the institution.
Faculty Search	SSR_FIND_INSTR	Search > Faculty Search	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.

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Page Name	Definition Name	Navigation	Usage
Learning Management System	LMS_TARGET_SELECT	Self Service > Learning Management Systems	Instructors can access your institution's Learning Management Systems.

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

Page Name	Definition Name	Navigation	Usage
Grade Roster	SS_GRADE_ROSTER	Self Service > Faculty Center > Grade Roster Self Service > Faculty Center > My Schedule Click the Grade Roster icon on the My Schedule page or the Grade Roster subtab.	Instructors view or enter grades, update the roster's approval status, and post grades.
Grade Change Request	SS_GRADE_CHANGE	Click the Grade Change Request link on the self-service Grade Roster page.	Instructors submit grade change requests. This link appears after grades are posted.

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Page Name	Definition Name	Navigation	Usage
Send Notification	SSS_NOTIFY	Click the Notify Selected Students or Notify All Students link on the Self-Service Grade Roster page.	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.
Students Without Email Address	SSR_NO_EMAIL	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.	Instructors view the students on the grade roster who do not have email addresses.
Transcript Note	GRADE_ROSTER_NOTE	Click the Note link on the Transcript Notes tab of the self-service Grade Roster page.	Instructors can add a transcript note to a student's transcript.
Printer Friendly Version	SS_GRADE_RSTR_PRT	Click the Printer Friendly Version link from the Self Service Grade Roster page.	Displays a printer friendly version of the grade roster.

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.

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- 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

Page Name	***Definition Name***	***Navigation***	***Usage***
Class Roster	SS_FAC_CLASS_ROST	• Self Service > Faculty Center > Class Roster • Self Service, Faculty Center, My Schedule Click the Class Roster icon for a class or the Class Roster subtab.	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.
Send Notification	SSS_NOTIFY	Click the Notify Selected Students or Notify All Students link on the Self-Service Class Roster page.	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.
Students Without Email Address	SSR_NO_EMAIL	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.	Displays the students on the class roster who do not have email addresses.
Printer Friendly Version	SS_FAC_CLSRSTR_PRT	Click the Printer Friendly Version link on the Self Service Class Roster page.	Displays a printer-friendly version of the class roster.

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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.

Related Links

"Understanding Integration with LMS Self-Service User Authentication" (PeopleSoft Campus Solutions 9.2: Student Records)

"Understanding LMS Setup" (PeopleSoft Campus Solutions 9.2: Student Records)

Pages Used for Instructor Self-Service Pages and LMS Authentication

Page Name	*Definition Name*	*Navigation*	*Usage*
My Schedule	INSTR_CLASS3	Self Service > Faculty Center > My Schedule Click the Learning Management button.	Instructors transfer directly to the academic content for the specified class within the external LMS.
Learning Management Systems	LMS_TARGET_SELECT	Self Service > Learning Management Systems	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.

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.

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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 9.2: Student Records)

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Chapter 15

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 in the classic user interface.

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 are 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.

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TheMove 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

Page Name	*Definition Name*	*Navigation*	*Usage*
My Planner	SSS_MY_PLANNER	• Self Service > Academic Planning > My Planner • Click the Plan link on the Student Center page.	Students plan courses based on their academic requirements or by browsing the course catalog.
Plan by My Requirements	SAA_SS_DPR_ADB	Click the Plan by my Requirements button on the My Planner page.	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.
Browse Course Catalog	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the My Planner page.	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.

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Page Name	*Definition Name*	*Navigation*	*Usage*
My Planner - Requirements	SSS_MY_PLANNER_REQ	Self Service, Academic Planning, My Planner Click the requirement icon: 	The requirement icon appears on the My Planner page when a student adds a course to the planner from the Plan by My Requirements or My Academic Requirements pages. When students select the icon, the requirement details indicate the requirement from which the course was added. If, when evaluating the course work, the course is used for a different requirement, the system provides additional information.
Browse Course Catalog - Course Detail	SSS_CRSE_OFFER_DTL	Click a course title on the Browse Course Catalog page.	View course details and access class sections.

Related Links

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Maintaining the Enrollment Shopping Cart

This section discusses how students maintain their course selections using shopping cart functionality in the classic user interface.

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.

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Page Used to Maintain the Course Shopping Cart

Page Name	Definition Name	Navigation	Usage
Shopping Cart	SSR_SSENRL_CART	• Self Service > Academic Planning > Enrollment Shopping Cart • Click the Plan link on the Student Center page, then click the shopping cart tab.	Student manages stored course sections selected using My Planner or My Requirements.

Related Links

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Viewing Course History

This section discusses how students view their course history, which is a summary of all courses taken through the current term, using the classic user interface.

Page Used to View Academic History

Page Name	Definition Name	Navigation	Usage
My Course History	SSS_MY_CRSEHIST	• Self Service > Academic Planning > My Course History • Click the Plan link on the Student Center page, then click the course history tab.	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.

Related Links

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Chapter 16

Using Self-Service Academic Services

Understanding My Academics

The My Academics self-service classic 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 the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Using Self-Service My Academics Functionality

Students can use the self-service My Academics functionality using the classic user interface.

Pages Used to Use Self-Service My Academics Functionality

Page Name	*Definition Name*	*Navigation*	*Usage*
My Academics	SSS_MY_ACAD	Student Center > My Academics	Students can access high-level academic data and link to various tasks.

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Page Name	*Definition Name*	*Navigation*	*Usage*
My Academic Requirements	SAA_SS_DPR_ADB	Click the View my advisement report link on the My Academics page.	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.
What-if Report Selection	SAA_SS_WHATIF_SEL	• Click the Create a what-if scenario link on the My Academics page. • Self Service > Degree Progress/Graduation > View What-If Report	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.
View My Advisors	SS_STDNT_ADVISR	• Click the View my advisors link on the My Academics page. • Self Service, Academic Records, View My Advisors	Students can view a list of their assigned advisors by academic institution, career, program, and plan.
Send Notification	SSS_NOTIFY	Click the Notify Selected Advisors or the Notify All Advisors links on the View My Advisors page.	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.
Evaluate My Transfer Credit	SS_TRCR_SRCH	• Click the Evaluate my transfer credits link on the My Academics page. • Self Service, Transfer Credit, Evaluate My Transfer Credit	Students can evaluate any transfer credits.
View Transfer Credit Report	SS_TRCR_RPT	• Click the View my transfer credit report link on the My Academics page. • Self Service, Transfer Credit, View Transfer Credit Report	Students can view their Transfer Credit reports.

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Page Name	*Definition Name*	*Navigation*	*Usage*
My Course History	SSS_MY_CRSEHIST	• Click the View my course history link on the My Academics page. • Self Service, Academic Records, My Course History	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.
View Unofficial Transcript	SSS_TSRQST_UNOFF	• Click the View my unofficial transcript link on the My Academics page. • Self Service, Academic Records, View Unofficial Transcript	Students can view their unofficial transcripts.
Request Official Transcript	SS_TSCRPT_OFF	• Click the Request official transcript link on the My Academics page. • Self Service, Academic Records, Request Official Transcript	Students can request official transcripts from the institution.
Request Enrollment Verification	SS_ENRL_VER_REQ	• Click the Request enrollment verification link on the My Academics page. • Self Service, Academic Records, Request Enrollment Verification	Students can request enrollment verification online or by mail, with multiple processing options.
Apply for Graduation	SS_GRAD_APPLY	• Click the Apply for graduation link on the My Academics page. • Self Service, Degree Progress/Graduation, Apply for Graduation	Students can select academic programs and apply for graduation.

Related Links

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Managing Academic Records Using PeopleSoft Fluid User Interface

Using PeopleSoft Fluid User Interface, click the Academic Records tile on the Student Homepage to:

- Review course history
- View grades

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- View unofficial transcript
- Request an official transcript
- View previous requests for transcripts

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Pages Used to Manage Academic Records Using PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Academic Records (Tile)	SSR_ACAD_REC_FL	Click to access course history, grades, submit requests to view unofficial transcript or get an official transcript.
Course History	SSR_CRSE_HIST_FL	Review information on: • courses taken • planned courses • transferred courses • courses in progress
View Grades	SSR_VWGD_GRADE_FL	Review grades for a class.
View Unofficial Transcript	SSR_VW_UNOFF_TS_FL	Request to view unofficial transcript.
Request Official Transcript	SSR_RQST_OFF_TS_FL	Enrolled and previously enrolled students as well as alumni can request an official transcript.

Requesting an Official Transcript

Submit Request

Use this page to select the processing options, destination, quantity and delivery method for your request.

Select Report Type This group box appears when your institution defines more than one advisement report for self service.

Select Processing Options When you select Degree Confer Date or Grade Posting, you must select a term.

Select Destination
- Send to My Address:
  - *Yes* is the default setting.

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- *No* allows you to enter a different delivery address.

- Send To: By default, your primary name is set. You can change this for your transcript.

Select Delivery Method The delivery method is defined by your institution.

The Make a Payment button appears on the Transcript Request Confirmation page If your institution requires payment for generating a transcript. You can choose to pay later by clicking the x button. Your request is submitted, but is not processed until you make your payment. If you choose to pay later, retrieve the request by going to the View All Requests page.

View All Requests

Use this page to view a history of your requests. From this page, you can also make a payment for requests you have yet to pay.

Request Status / Payment Status The status "On Request" means your request has been submitted.

A payment status can be:

- Blank, which means no attempt to pay has been made. If the status is blank and your institution requires a payment for the transcript, then select the request and then click *Make a Payment*. Follow the instructions on the screen to submit your payment.

- Received, which means payment was successfully received

- Unsuccessful, which means payment was declined

Make a Payment This button is enabled when you select a request whose Payment Status is blank.

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Chapter 17

Using Self-Service Enrollment

Understanding Self-Service Enrollment

The self-service enrollment classic interface 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.

See Setting Up Self-Service Navigation.

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.

  See the product documentation for *PeopleTools: System and Server Administration,* Using PeopleTools Utilities, Using Administration Utilities, Message Catalog.

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Fluid self-service uses the following message catalog entries:

- Fluid Shopping Cart Enrollment (Message Set 14642)
- Enrollment Engine Fluid - Class Search (Message Set 14643)

Related Links

Searching for Classes Using Classic Self-Service Pages

Searching for Classes Using Classic Self-Service Pages

Students, instructors, and community members use Class Search in the self-service classic user interface 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.

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.

Related Links

Setting Up Self-Service Navigation

Prerequisites

Set up self-service class search for the classic user interface 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 9.2: Student Records)
"Defining Term Values" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Pages Used to Search for Classes Using Self-Service Pages

Page Name	*Definition Name*	*Navigation*	*Usage*
Search for Classes - Search Criteria	SSR_CLSRCH_ENTRY	• Self Service > Search > Search for Classes • Self Service > Student Center Click the Search link. • Self Service > Academic Planning > My Planner Click the Search tab. • Self Service > Academic Planning > Enrollment Shopping Cart Click the Search link. • Self Service > Class Search/Browse Catalog • Self Service > Enrollment > Enrollment: Add Classes Click the Class Search option. Click the Search link. • Self Service > Enrollment > Enrollment: Swap Classes Click the Class Search option. Click the Search link.	Users specify the academic institution and term in which they want search for classes. Users enter search criteria and retrieve results.
Search for Classes - Search Results	SSR_CLSRCH_RSLT	Click the Search button on the Search for Classes page.	Review all classes that match the search criteria.
Search for Classes - Class Detail	SSR_CLSRCH_DTL	Click a class section on the Search for Classes - Search Results page.	Review detail for a specific class.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Browse Course Catalog	SSS_BROWSE_CATLG	• Self Service > Search > Browse Course Catalog • Self Service > Class Search/Browse Catalog > Browse Course Catalog • Self Service > Student Center Click the Search link. Click the Browse Course Catalog tab. • Self Service > Academic Planning > My Planner Click the Browse Course Catalog button.	Browse the course catalog to see a list of courses offered at the institution.
Browse Course Catalog - Select Course Offering	SSS_BCC_SEL_CRSE	On the Browse Course Catalog page, click a course title that includes this message: *** view multiple offerings.	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.
Browse Course Catalog - Course Detail	SSS_CRSE_OFFER_DTL	Click a course title on the Browse Course Catalog page.	View course details and access class sections.

Selecting Search Criteria and Searching for Classes

Access the Search for Classes page (Self Service >Search >Class Search).

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 9.2: 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.

Institution When accessed by a student through self-service navigation, the institution appears as default from the student's row in the STD_CAR_TERM table.

Term When accessed by a student from Class Search, the student's user preference term appears. When accessed from Add Classes or Swap Classes, the term selected appears here.

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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-drop list box option on the Student Records Installation page. However, the Course Subject field on the Search for Classes page dynamically changes 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.

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- less than: Finds classes with a meeting end time earlier than the specified time.
- less than or equal to: Finds classes with a meeting end time at or earlier than the specified time.
- is exactly: Finds classed with a meeting end time that is exactly at 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 retrieves 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 retrieves 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.

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- 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).

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 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 9.2: 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).

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 9.2: Student Records)

Browsing the Course Catalog

Access the Browse Course Catalog page (Self Service > Class Search/Browse Catalog > Browse Course Catalog).

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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).

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).

Students and instructors can click the view class sections button to view the course schedule details on this page.

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 9.2: Application Fundamentals).

Browsing the Course Catalog Using PeopleSoft Fluid User Interface

Navigation

Student Homepage >Manage Classes >Browse Course Catalog

Use keywords to search for courses using the course catalog in PeopleSoft Fluid User Interface. You can filter the search results by Course Career, Academic Organization, Campus, Typically Offered, Units, and so on. From this page, you can also track recently viewed courses.

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Additional ways to search Click to search for classes by subject, catalog number, or frequency or the term that the course is offered. Only subjects that are scheduled for the term appear in the Available Subjects field.

When you select a course, the Course Detail page appears. From the Course Detail page, you can add the course to the planner, or if classes are scheduled view class sections. If classed are scheduled, you can select a term, and then select a class option. Once you select a class option, you are guided through a process where you either add your class to the shopping cart or go straight to enrollment.

Viewing a Class Schedule

This section lists the pages that students use to view their class schedule using the classic interface.

Pages Used to View a Class Schedule

Page Name	*Definition Name*	*Navigation*	*Usage*
My Class Schedule	SSR_SSENRL_LIST	• Self Service > Enrollment • Student Center > Enroll > My Class Schedule	Students use this page to view their class schedules for a term.
Textbook Summary	SSR_SSCLSTXB_SUM	Click the View Textbook Summary link on the My Class Schedule page.	Students can view textbook assignments for each of their classes. 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).
Weekly Schedule	SS_WEEKLY_SCHEDULE	• Self Service > Enrollment > My Class Schedule Select the Weekly Calendar View option. • Self Service > Enrollment > View My Weekly Schedule	Students use this page to view their weekly schedules. **Note:** Before students can view their weekly schedules, you must define weekly schedule time periods. See Setting Up Weekly Schedule Time Periods.

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Page Name	Definition Name	Navigation	Usage
Academic Calendar Deadlines	ACAD_CAL_DATES	Click the Academic Calendar Deadlines icon on the My Class Schedule page.	Students use this page to view drop, cancel, and withdrawal deadlines for a class on their class schedules. The page also enables students to access Gradebook and the Learning Management System if the institution sets up the connections.

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

Page Name	Definition Name	Navigation	Usage
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.

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Pages Used to Drop Classes

Page Name	*Definition Name*	*Navigation*	*Usage*
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.
Drop Classes - View Results	SSR_SSENRL_RSLT	Click the Next button on the Drop Classes – Confirm Your Selection page.	Students use this page to view the results of their drop requests.

Swapping Classes

This section lists the pages that students use to swap classes using self-service pages.

Pages Used to Swap Classes

Page Name	*Definition Name*	*Navigation*	*Usage*
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.

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Pages Used to Edit Classes

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

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.

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Pages Used to View Term Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Term Information	SSR_SS_TERM_LINKS	Student Center > Enroll > Term Information	Students use links to access enrollment dates, assignments, learning management systems, exam schedules, and grades.
Enrollment Dates	SSR_SSENRL_APPT	Click the View my enrollment dates link on the Term Information page.	Students can view detail information about their enrollment appointments, such as start date, end date, start time, end time, and unit limits.
View Assignments and Grades	SS_LAM_STD_GR_LST	Click the View my class assignments and grades link on the Term Information page.	Students can view assignment and grade information for classes that use the Gradebook feature.
My Learning Management Systems	SSR_LMS_TARGET	Click the View learning management systems link on the Term Information page.	Students access a list of LMS providers and click the appropriate provider links to directly access their home pages in those LMS providers' websites. **Note:** For a provider link to appear on the My Learning Management Systems page, the Display as LMS Link must be selected on the LMS Provider page.
My Exam Schedule	SSR_SSENRL_EXAM_L SSR_SS_WEEK	Click the View my exam schedule link on the Term Information page.	Students view their exam schedule for a term.
View My Grades	SS_ES_GRADE_LIST	Click the View my grades link on the Term Information page.	Students can view final and midterm grades for a selected term.

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.

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Related Links

"Understanding Integration with LMS Self-Service User Authentication" (PeopleSoft Campus Solutions 9.2: Student Records)

"Defining LMS Providers" (PeopleSoft Campus Solutions 9.2: 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.

Managing Classes Using PeopleSoft Fluid User Interface

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Displaying Class Schedules in Fluid User Interface

Pages Used to Manage Classes

Page/Tile Name	***Definition Name***	***Usage***
Manage Classes Tile	SSR_START_PAGE_FL	Click to access View My Classes page. When you click this tile, the behavior differs depending on the type of device you are using: • On smartphones, a landing page appears where you can make additional choices. • On tablets, laptops, and desktops, a group box appears that defaults to View My Classes as one of many choices.

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Page/Tile Name	*Definition Name*	*Usage*
View My Classes	SSR_VW_CLASS_FL	View all the classes that you are enrolled in or waitlisted, or have dropped.
View Class Schedule	SSR_VW_CLASS_FL	Display class schedules.
Class Information	SSR_CLASSDTL_SCF	Displays class or meeting details.
Shopping Cart	SSR_SHOP_CART_FL	Select, delete, validate, and change options for classes.
Class Search and Enroll	SSR_CLSRCH_MAIN_FL	Click to search for classes.
Drop Classes	SSR_DROP_TERM_FL	Select classes to drop.
Update Classes	SSR_ED_CLASS_FL	Update or edit classes in the class schedule.
Swap Classes	SSR_SWAP_ENRL_FL	Swap classes in the class schedule.
Browse Course Catalog	SSR_BROWSE_CTLG_FL	Click to search for courses. See Browsing the Course Catalog Using PeopleSoft Fluid User Interface.
Planner	SSR_PLNR_ITEM_FL	Click to view courses you have added. If you have not added a course, you can do so by clicking Add from Course Catalog or Add from My Requirements.
Enroll by My Requirements	SSR_REQ_ENRL_FL	Click to view requirement and course details. From here you can also add a course to the planner or enroll in classes.

Viewing Classes

Use the View My Classes page to view classes you are enrolled in, waitlisted, or have dropped. If registered in multiple terms, the Select a Value page is displayed so you can select a term for which to view classes. For institutions with only one institution in their Academic Institution table, the institution name is not displayed. If you are registered to multiple institutions, careers, or terms, click Change in the View My Classes page to view classes for other institutions, careers, or terms.

By default, classes are displayed in the following order: Enrolled, Waitlisted, or Dropped. Use the class registration status (Enrolled, Waitlisted, Dropped) to control which classes are displayed on the page.

To view classes, select the term, career, and institution combination for which you have registered classes. The View Class Schedule page appears. Depending on how your institution sets up the display options for this page, schedules may appear:

By Class This is the default view in which classes are displayed. To change the default, see Displaying Class Schedules in Fluid User Interface.

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By Date	On this page, you can select a valid date range from which classes are displayed. Initially, From is set to the term start date, or is the term that has commenced on the current date. To is set to seven days after the current date.

When you click a class, more information about the class appears on the Class Information page. From the Class Information page, you can view Meeting Details, Class Details, or Instructor information. While the number of schedules that appear on the View My Classes page is set to a maximum of 10, on the Meeting Details page all schedules are displayed.

On tablets, laptops, and desktops, you can view enrollment deadlines as well.

Using the Shopping Cart

Use the Shopping Cart page to validate classes prior to enrollment. If registered in multiple terms, the Select a Value page is displayed so you can select a term for which to view the Shopping Cart. You may also delete classes from the shopping cart if they are no longer required and enroll in classes at the appropriate time. When you click *Enroll*, a confirmation page is displayed indicating the outcome of the transaction. For institutions with only one institution in their Academic Institution table, the institution name is not displayed. If you are registered to multiple institutions, careers, or terms, click *Change* on the page to view the Shopping Cart for other institutions, careers, or terms.

You may also use the Shopping Cart to change your enrollment preferences: for example, Add to Waitlist or change your Grading Basis. You may also select a different group of class options where there are either ‘required’ multiple components, or ‘optional’ components within the same class association. Clicking on the class link provides access to the class information page, detailed meeting patterns, class availability, enrollment information, and instructor details.

Searching for Classes

In Class Search using Fluid, you can use keywords to search for courses and classes. You can filter the search results by Meeting Days, Meeting Times, Units, and so on. As you view courses, you can select a course and add it as a favorite. This makes it easy to enroll in the course at a later date. You can also track recently viewed courses.

In addition to keyword search, you can click *Additional ways to search* to look for courses and classes. From the page that appears, you can search for classes by subject and catalog number. Only subjects that are scheduled for the term appear in the Subject field. From the same page, you can also search for instructors using their last name.

When you select a course, classes are displayed as a number of class options. A class option is a class or group of classes that satisfy the filters you used. If a class option contains classes with a time conflict, you may or may not see them depending on how the system was set up. Once you select a class option, you are guided through a process where you either add your classes to the shopping cart or go straight to enrollment. As part of the enrollment process, you can choose to add a class to a Waitlist, Permission Number, and so on. If for any reason you are unable to enroll in the class because it is full or a permission number is required, you can re-enter the process to provide required information (without having to go through search again), and then complete enrollment.

Related Links

Understanding Search in PeopleSoft Fluid User Interface

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Browsing the Course Catalog Using PeopleSoft Fluid User Interface

Dropping Classes

Use the Drop Classes page to drop classes from your class schedule. If registered in multiple terms, the Select a Value page is displayed so you can select a term for which to drop classes. When you click *Drop Classes*, you are led through a guided activity that takes you through the necessary steps to drop classes.

When you click a class, more information about the class appears on the Class Information page. This page displays more details about the class; for example, if a drop consent is required before the class can be dropped.

Updating Classes

Use the Update Classes page to update or edit classes within your class schedule. When you select a class, an activity guide takes you through the necessary steps to complete the update process. Depending on the permissions, you are able to update the class preferences you previously selected and where optional components are available for you to select.

Swapping Classes

Use the Swap Classes page to swap classes in the class schedule. Currently, you can swap classes using Class Search, Shopping Cart, and Class Number. Once you select a class, an activity guide helps you complete the process.

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Chapter 18

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 in My Oracle Support (ID 1400723.1):

- Using the Rules Engine for Program Enrollment Student Self-Service: System/Example Data

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- 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 9.2: Student Records)

"Managing APT Enrollment" (PeopleSoft Campus Solutions 9.2: Student Records)

"Setting Up Rules for Program Enrollment" (PeopleSoft Campus Solutions 9.2: Student Records)

Pages Used for Self-Service Program Enrollment

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Overview	SSR_PRG_TREE_CRDE	Self Service > Program Enrollment > Program Overview	Provides a display-only view of a student's entire program/ APT instance.
My Education Plan	SSR_MP	Self Service > Program Enrollment > My Education Plan	Allows students to review program requirements by term (equates to term node) and to select courses.
My Course Selection	SSS_PE_PLNR_CRSE	Self Service > Program Enrollment > My Course Selection	Provides a view of courses by term, including required courses and any optional courses selected by the student.
My Schedule Builder	SSR_APT_SCHD_BLDR	Self Service > Program Enrollment > My Schedule Builder	Students use the Schedule Builder to enroll in classes. The data in the Schedule Builder is sourced only from APT.
My Classes	SSR_SS_MY_CLASSES	Self Service > Program Enrollment > My Classes	Students view their classes and can add and drop classes.
My Results	SSR_APT_DAT_RPT_CM	Self Service > Program Enrollment > My Results	Students can view results for courses and other program elements.

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Chapter 19

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 9.2: Student Records)
- "Defining Academic Institutions" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Pages Used to Manage the Activity Management WorkCenter

Page Name	*Definition Name*	*Navigation*	*Usage*
Activity Manager	SSR_ACR_MAIN_SS	Self Service >Activity Management WorkCenter	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.
Instructors	SSR_ACSS_INSTR_SEC	Self Service >Activity Management WorkCenter >Manage Rosters	Select the Instructor Name link to access contact information for the instructor.

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Page Name	Definition Name	Navigation	Usage
Result Access	SSR_AMWC_RWK_SEC	Self Service >Activity Management WorkCenter >Manage Rosters	Select to display the result access available to the instructor for the particular activity.
Activity Roster	SSR_ACR_ROSTER_SS	Self Service >Activity Management WorkCenter >Manage Rosters	Select the activity roster icon to access information on the students associated with the activity.
Activity Roster – Student Detail	SSR_ACR_IAMTREESS	Self Service >Activity Management WorkCenter >Manage Rosters >Activity Roster	Select the student detail link to access the entire course content tree for the student.
Activity Dates	SSR_ADC_ACTN_SEC	Self Service >Activity Management WorkCenter >Manage Rosters >Activity Roster	Select the Activity Dates link to view the activity dates associated with the student.
Attachments	SSR_ACTIVITY_ATT	Self Service >Activity Management WorkCenter >Manage Rosters >Activity Roster	Select to access any attachments submitted by the student.
Result Roster	SSR_ACR_RESULT_SS	Self Service >Activity Management WorkCenter >Manage Rosters	Select the result roster icon to grade the activity.
Result Scale Table	SSR_AC_SCALE_SS_SP	Self Service >Activity Management WorkCenter >Manage Rosters >Result Roster	Select the Result Scale icon to view details about the result scale associated with the student.
Activity Root Roster	SSR_ACR_MASTR	Self Service >Activity Management WorkCenter >Manage Rosters	Select the Activity Root Roster link to view the root roster for the course.
Maintain Coursework	SSR_ACM_MAIN_SS	Self Service >Activity Management WorkCenter >Manage Coursework	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.
Insert Activity	SSR_ACSS_INSSEC	Self Service >Activity Management WorkCenter >Manage Coursework	Select to insert a new activity or edit an existing one.

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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

Program Enrollment and non-Program Enrollment students can access class activities in self-service. Program Enrollment students will access their activity detail via the Program Enrollment folder in Self-Service, while non-Program Enrollment students can access their activity detail through the Student Center. Course activities are available to students in self-service when courses are set up to use Activity Management. The activity detail displayed to students depends on the student's relationship to the course and the level of setup completed in the Activity Management structure. The following chart outlines the activity detail that appears:

Highest Activity Level Defined	***Student Term Activated***	***Student Enrolled***	***Activity Level Displayed***
None	Yes or No	Yes or No	None
Activity Registry	Yes or No	Yes or No	Activity Registry
Activity Manager	No	No	Activity Registry
Activity Manager	Yes	No	Activity Manager
Activity Manager	Yes	Yes	Activity Manager
Individual Activity Manager	Yes	Yes	Individual Activity Manager

Students accessing data from the Activity Registry or Activity Manager will be able to view coursework detail. For students able to access their Individual Activity Manager, they will be able to perform the following actions:

- View the coursework and coursework detail.
- View current or previous attempts, and current or 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 or activities.
- View exams and exam details.
- Select reassessment exams.

Access to select optional activities and confirm attendance are set up on the Activity Dates component.

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See "Understanding Activity Management" (PeopleSoft Campus Solutions 9.2: Student Records)

Pages Used to Manage Student Activities

Page Name	*Definition Name*	*Navigation*	*Usage*
Activity Details	SSR_ACT_DET_SEC	• Self Service >Program Enrollment >My Activity • Self Service >Student Center In This Week's Schedule, click any one of the following icons: ◦ Gradebook/Class Activities ◦ View Class Activities - Action Required • Self Service >Student Center >My Academics >View my course history In the Activities column, click any one of the following icons: ◦ Gradebook/Class Activities ◦ View Class Activities - Action Required	Select the Activity Description link to view details about the activity.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Attachments	SSR_IAM_CONT_ATT	• Self Service >Program Enrollment >My Activity Click the Attachments link that corresponds to the activity. • Self Service >Student Center In This Week's Schedule, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Attachments link that corresponds to the activity. • Self Service >Student Center >My Academics > View my course history In the Activities column, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Attachments link that corresponds to the activity.	Select the Attachments link to download attachments from the instructor or to upload assignments to the instructor.

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Page Name	Definition Name	Navigation	Usage
Extenuating Circumstances	SSR_IAM_EXTN_SEC	• Self Service >Program Enrollment >My Activity Click the corresponding Extenuating Circumstances link. • Self Service >Student Center In This Week's Schedule, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the corresponding Extenuating Circumstances link. • Self Service >Student Center >My Academics >View my course history In the Activities column, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the corresponding Extenuating Circumstances link.	Select the Extenuating Circumstances link to display assigned extenuating circumstances associated to the result or the activity. Only appears when an extenuating circumstance was assigned.

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Page Name	Definition Name	Navigation	Usage
My Activities	SSR_SS_MY_ACTIVITY SSR_CRSE_ACTIVITY	• Self Service >Program Enrollment >My Activity Self Service >Student Center >This Week's Schedule In This Week's Schedule, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required • Self Service >Student Center >My Academics >View my course history In the Activities column, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required • Self Service >Student Center >Plan >Course History Click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required • Self Service >Student Center >Enroll >term information >View my grades Click any one of the following icons: • Gradebook/Class Activities	View all courses and coursework for a term.

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Page Name	*Definition Name*	*Navigation*	*Usage*
		• View Class Activities - Action Required • Self Service >Student Center >Enroll >my class schedule Click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required	
My Exams	SSR_SS_MY_EXAMS	Self Service >Program Enrollment >My Exams	Lists Activity Management exams assigned to the student for a specific academic period.
Exam Details	SSR_ACT_DET_SEC	Self Service >Program Enrollment >My Exams Click the Activity Description link.	View exam details.
My Exam Schedule	SSR_SSENRL_EXAM_L	Self Service >Student Center >Enroll >term information >View my exam schedule	Lists all exams assigned to the student.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Previous Attempts	SSR_PR_ATTEMPT_SEC	• Self Service >Program Enrollment >My Activities >Previous Attempts • Self Service >Student Center >This Week's Schedule In This Week's Schedule, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Previous Attempts link. • Self Service >Student Center >My Academics >View my course history In the Activities column, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Previous Attempts link.	Select the Previous Attempts link to view previous attempt information. Available when multiple attempts have been made. Displays data for all attempts.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Results Attempts History	SSR_PR_ATTEMPT_SEC	• Self Service >Program Enrollment >My Activities • Select Show Results >Result History • Self Service >Student Center >This Week's Schedule In This Week's Schedule, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Attempts History link. • Self Service >Student Center >My Academics >My Course History In the Activities column, click any one of the following icons: • Gradebook/Class Activities • View Class Activities - Action Required Click the Attempts History link.	Select the Attempts History link to view previous result information. Available when multiple results have been entered. Displays data for all results.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Resit Exam Selection	SSR_CRSE_RESITS	• Self Service >Program Resit Exam Selection >My Activities • Self Service >Student Center >This Week's Schedule In This Week's Schedule, click any of the following icons: • Gradebook/Class Activities • View Class Activities – Action Required Click the Resit Exam Selection link. • Self Service >Student Center >My Academics >View my course history In the Activities column, click one of the following icons: • Gradebook/Class Activities • View Class Activities – Action Required Click the Resit Exam Selection link.	Link will appear when student is eligible to select a resit exam period.
View Class Activities	SSR_VIEW_TREE_SEC	• Self Service >Student Center >Search or Search for Classes Click the Class or Section link to view details about the class. • Self Service >Student Center >Plan >shopping cart Select a class via Class Search or My Requirements.	View details about the class.

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Page Name	*Definition Name*	*Navigation*	*Usage*
View Course Activities	SSR_VIEW_TREE_SEC	• Self Service >Student Center >Search or Search for Classes >browse course catalog • Self Service >Student Center >Plan >My Planner Select a course.	View details about the course

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Chapter 20

Using Research Tracking Self Service

Using Research Tracking Self Service

Note: Before candidates and administrators can use this self-service feature, they must have a user ID, an EmplID, and a role that includes security access to the self-service pages.

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 are 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.

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 allows 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.

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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 updates the candidate's research information directly.

Candidate Center Status Detail Pages

When you access the following status detail pages, some fields may or may not appear. The pages also show only 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.

Status Detail Pages	***How to Access***
Research Topic Details	Go to Candidate Center, My Research Projects region, then click a research topic link.
Supervisor Details	Go to Candidate Center, My Research Projects region, then click a supervisor name.
Consumption/Submission Details	Go to Candidate Center, My Research Projects region, then click a link in the Completion Dates section.
Thesis Detail	Go to Candidate Center, My Research Projects region, then click a link in the Thesis Evaluation section.
Assignment Details	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 service item entry pages correspond to the various research service items that candidates could initiate, and 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.

- Research Topic Details — Submit a new research proposal page
- Supervisor Details — Request a supervisor page
- Assignment Details — Create a new assignment page
- Consumption/Submission Details — Update project submission info page

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- Thesis Details — Update thesis information 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 is assigned to an administrator, a notification is 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 updates, 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 is 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 can view 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.

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.

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Pages Used to Create and Update Service Requests (Candidates)

Page Name	*Definition Name*	*Navigation*	*Usage*
My Service Requests	SSS_RS_VIEW_SR	Self Service > Research Activities > Service Requests	A candidate can use this page to: • 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.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Select a Request Subtype	SSS_RS_REQSBT	Click the Next button on the Select a Request Type page.	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.
My Request Detail	SSS_RS_CRTE_SR	Click the Next button on the Select a Request Subtype page.	Candidate can enter comments, attach files and submit the service request.
My Request Detail (View or Update)	SSS_RS_UPDATE_SR	Click the service request link on the My Service Requests page	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.

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.

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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

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.

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.

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.

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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 9.2: 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

Page Name	*Definition Name*	*Navigation*	*Usage*
Research Topic Search	SSS_RS_TPCSRCH1	Self Service > Research Activities > Research Topic Search	A candidate or administrator can use this page to search for research topics.

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Searching for Research Topics

Access the Research Topic Search page (Self Service >Research Activities >Research Topic Search).

On this page, the simple search provides a keyword search function. Any text you enter in the Search field is used to search against the research topic code, short description, and long description. The Advanced Search link enables you to search by research topic code, request category, supervisor, and organization.

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Chapter 21

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

Page Name	*Definition Name*	*Navigation*	*Usage*
Share My Information - Summary	SS_CC_DA_HDR	• Self Service > Share My Information • Self Service >Student Center Click the Share My Information button on the Student Center page. • Self-Service >Campus Personal Information >User Preferences Click the Share My Information link on the User Preferences page.	A delegator uses this page to: • Create a proxy, then delegate access to the proxy. • View the list of proxies to whom the delegator has given access. • Delete proxies, or modify proxy details such as changing email address or revoke access to a delegated transaction. 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.

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Page Name	*Definition Name*	*Navigation*	*Usage*
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).

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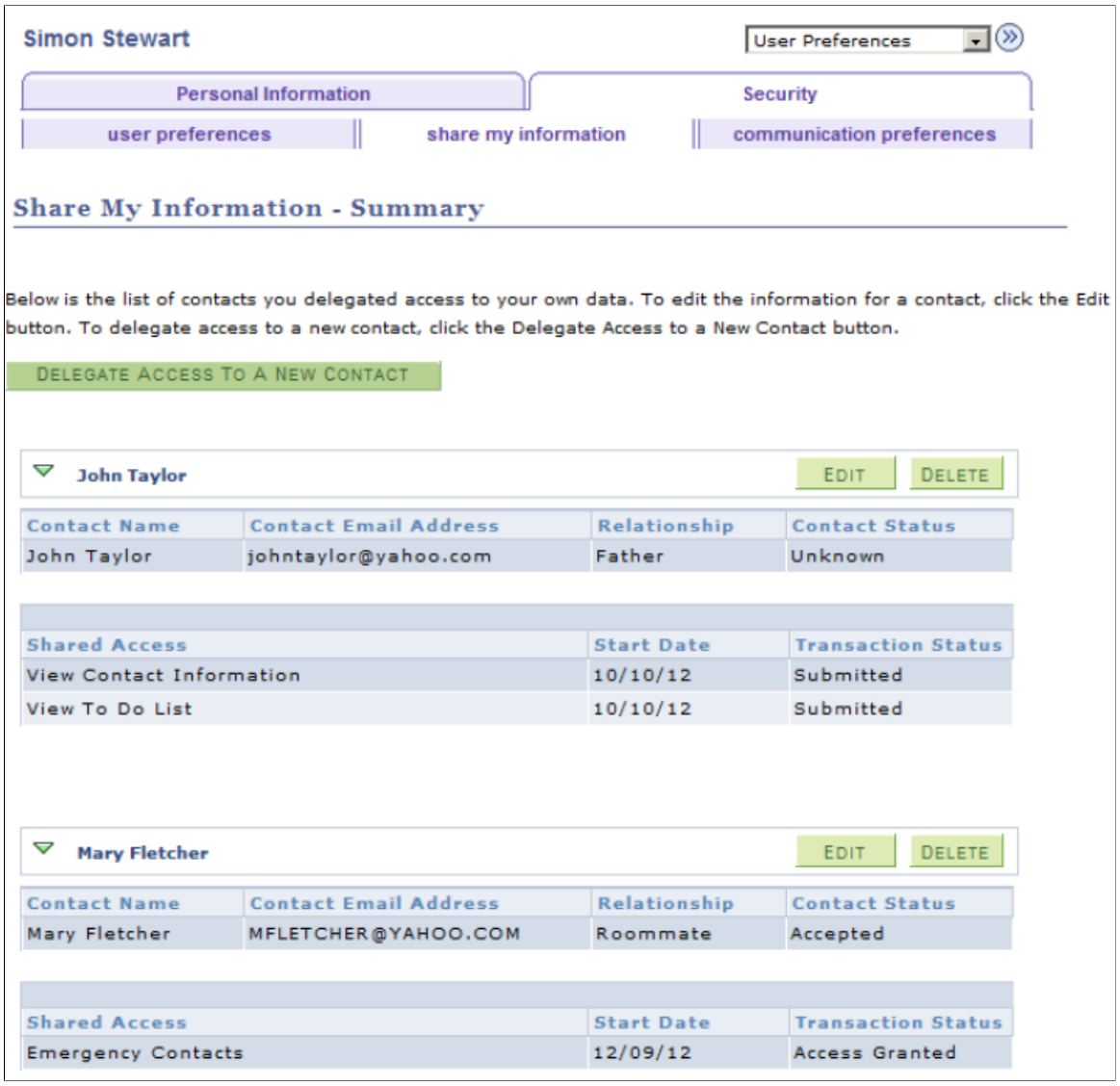
Image: Share My Information - Summary Page

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 9.2: Campus Community)

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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.)

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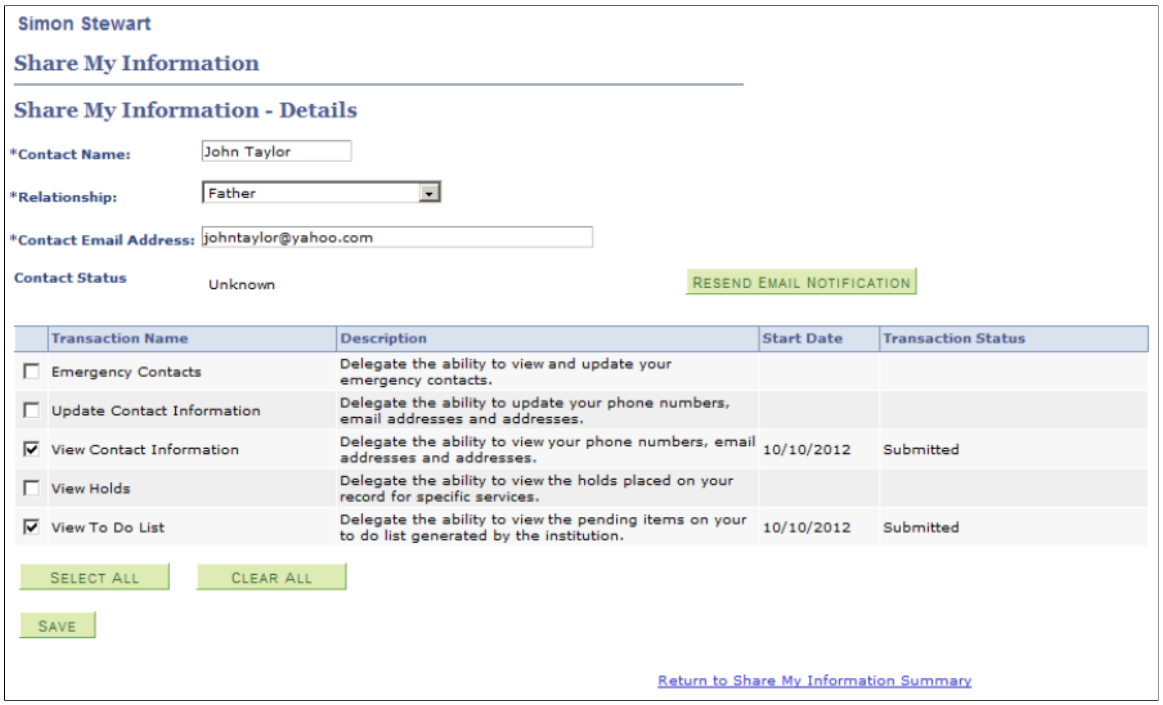
Image: Share My Information - Details Page

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 9.2: Campus Community)

"Notifications Framework and Delegated Access" (PeopleSoft Campus Solutions 9.2: Campus Community)

"Defining Installation Options for New User Registration" (PeopleSoft Campus Solutions 9.2: Campus Community)

Accessing Delegated Transactions

This section discusses how a proxy accesses a transaction that has been delegated.

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Pages Used to Access Delegated Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Terms and Conditions for Accessing Somebody Else's Data	SS_CC_DA_TERMS_CON	Self Service >Proxy Terms and Conditions	The proxy uses this page to accept the academic institution's terms and conditions.
<one or more pages for which access has been delegated to the proxy>	N. A.	Self Service >Shared Information Center	The proxy uses these pages to access the delegated transaction.

Accepting or Declining Terms and Conditions

Access the Terms and Conditions for Accessing Somebody Else's Data page (Self Service >Proxy Terms and Conditions).

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 are 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 9.2: Campus Community)

"Delegated Access Validation" (PeopleSoft Campus Solutions 9.2: Campus Community)

"Notifications Framework and Delegated Access" (PeopleSoft Campus Solutions 9.2: Campus Community)

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"New User Registration Context" (PeopleSoft Campus Solutions 9.2: 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 returns the names of the two children who gave her access to that component.

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Chapter 22

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.

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 9.2: 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

Page Name	*Definition Name*	*Navigation*	*Usage*
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service > Degree Progress/Graduation > View Degree Progress Report	Students can request a Degree Progress report by selecting their institution and a report type, and then clicking the Go button.
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Students can generate a degree progress report based on a what-if program of study.
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Students can set up a course list what-if scenario and then generate a degree progress report based on that what-if coursework.

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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 classic 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

Page Name	*Definition Name*	*Navigation*	*Usage*
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.

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Page Name	*Definition Name*	*Navigation*	*Usage*
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

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Chapter 23

Using Student Financials Self Service

Understanding Student Financials Self Service

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. If PeopleSoft Fluid User Interface is enabled, students first see Fluid Home, and from this page access other home pages based on their permissions. In Student Financials classic user interface, the navigation tabs are defined on the Navigation Tabs Setup page.

The following table outlines what students can do using classic or Fluid user interface, or both.

Students can	***Using these interfaces***
View account activity	Classic. See Viewing Account Activity.
View outstanding charges and deposits, pending payments and financial aid, and total due	• Classic. See Viewing an Account Summary • Fluid. See Viewing Account Summary.
View details on due invoices	• Classic. See Viewing Charges Due Details • In Fluid, click the Navigation Bar to navigate to the classic interface.
Viewing payment history	• Classic. See Viewing Payment History • Fluid. See Viewing Payment History. Charges paid by payment is available through the classic interface; for Fluid, you can view this only on a laptop.
Make self-service (hosted) payments	• Classic. See Specifying Payment Details (Hosted Payment). • Fluid. See Making Electronic Payments.
Make self-service (non-hosted) payments	Classic. See Specifying Payment Details (Non-Hosted Payment).
Enroll in direct deposit	• Classic. See Enrolling in Direct Deposit. • Fluid. See Managing Direct Deposits.
Manage bank accounts	Classic. See Setting Up and Managing Bank Accounts.

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Students can	*Using these interfaces*
Enroll in a payment plan	• Classic. See Enrolling in a Payment Plan. • In Fluid, click the Navigation Bar to navigate to the classic interface.
Enroll or view 1098-T	• Classic. See Viewing the 1098-T Form. • In Fluid, click the Navigation Bar to navigate to the classic interface.
Access payment profiles	Classic. See Creating Payment Profiles.
Purchase miscellaneous items	• Classic. See Purchasing Miscellaneous Items. • In Fluid, click the Navigation Bar to navigate to the classic interface.
View or confirm student permissions	• Classic. See Viewing Student Permissions. • In Fluid, click the Navigation Bar to navigate to the classic interface.

See:

- "Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
- Setting Up Institution Sets
- Setting Up Self-Service Navigation

Viewing Outstanding Charges, Payments, Financial Aid, and Refunds

This section discusses how to do the following using Campus Solutions classic interface:

- 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.

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- View the charges paid by a payment.
- View pending financial aid.

Pages Used to View Outstanding Charges, Payments, Financial Aid, and Refunds

Page Name	*Definition Name*	*Navigation*	*Usage*
Account Inquiry - Account Summary	SSF_SS_ACCT_SUMM	Self Service > Campus Finances > Account Inquiry > Account Inquiry - Account Summary	Review a summary of outstanding charges and deposits, pending payments, pending financial aid, and total due.
Account Inquiry - Account Activity	SSF_SS_ACCT_ACTVTY	Self Service > Campus Finances > Account Inquiry > Account Inquiry - Account Activity 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.
Account Inquiry - Charges Due	SSF_SS_CHRGS_DUE	• Self Service > Campus Finances > Account Inquiry > Account Inquiry - Charges Due • Click the Charges Due link or a tab on any page.	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.
Account Inquiry - Payment History	SSF_SS_PMT_HIST	Self Service > Campus Finances > Account Inquiry > Account Inquiry - Payments Click the Payments link or a tab on any page.	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 appear on this page and whether students are permitted to drill down through posted payments to see which charges were reduced by those payments.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Account Inquiry - Pending Financial Aid	SSF_SS_PEND_FINAID	Self Service > Campus Finances > Account Inquiry > Account Inquiry - Pending Financial Aid Click the Pending Aid link or a tab on any page.	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.

Viewing an Account Summary

Access the Account Inquiry - Account Summary page (Self Service > Campus Finances > Account Inquiry > Account Inquiry - Account Summary).

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).

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.

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Viewing Charges Due Details

Access the Account Inquiry - Charges Due page (Self Service > Campus Financials > Account Inquiry > Account Inquiry - Charges Due).

This page shows three different views of the student's outstanding charges due: a summary of charges by due date, details by due date, and details by type of charge. Click the Details by Due Date region or the Details by Charge region to see the details.

Details by Due Date — Expand this region to view charge details by due date.

Note: The system displays charges by date within a term.

Details by Charge — Expand this region to view charge details. Students can filter these by term.

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.

Invoices Due — Expand the Invoice Due region to view invoice details.

Viewing Payment History

Access the Account Inquiry - Payment History page ((Self Service > Campus Finances > Account Inquiry > Account Inquiry - Payments).

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.

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).

View pending financial aid amounts by all terms or by specific terms.

Financial Aid — Click to access financial aid information.

See Understanding Financial Aid Self-Service .

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Creating Payment Profiles

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.

This section provides an overview of self-service payment profiles and discusses how to do the following using the classic user interface:

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

Understanding Self-Service Payment Profiles

Important! PeopleSoft Business Interlinks is a deprecated product. The Business Interlinks class currently exists for backward compatibility only. For new integrations, use Integration Broker instead.

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 9.2: 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.

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/ Purchases - Payment Profile - Payment Profile Summary	SS_SF_ACCT_PROFILE	Self Service > Campus Finances > Electronic Payments/Purchases - Payment Profile - Payment Profile Summary	View payment profiles. If students have established profiles, they appear here.
Electronic Payments/ Purchases - Payment Profile - Profile Detail	SS_SF_ACCT_PRFL_D	Self Service > Campus Finances > Payment Profile > Electronic Payments/Purchases - Payment Profile - Profile Detail. Click the link of the appropriate profile.	View payment profiles.
Electronic Payments/ Purchases - Payment Profile - Edit Payment Profile	SS_SF_ACCT_PRFL_D	Click the Edit or Delete button next to the appropriate profile to edit or delete the details of the payment profile.	Edit or delete details for payment profiles. On this page, the credit card type and credit card number are read-only, and the card number is masked.

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).

If a student has not yet created a payment profile, the Payment Profile 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.

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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).

Preferred Account	Select to designate this payment profile (Edit mode only) as the one that the system selects by default whenever the student makes a self-service payment. A student can have only one preferred payment profile per profile (or payment) type.
Profile Type	Specify whether the profile is for an *Electronic Check* or *Credit Card* account. If you select *Electronic Check,* the eCheck group box becomes available. If you select *Credit Card,* the Credit Card group box becomes available.

eCheck

Specify whether the account 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.

Making Self-Service Payments

This section provides an overview of self-service payments using Campus Solutions, lists prerequisites, and discusses how to do the following using the classic user interface:

- 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.

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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) on classic and Fluid user interfaces 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.

The Make a Payment pages on Fluid user interface is designed to work with only hosted payment, and uses the activity guide framework. Students are able to make payments using any device.

If you use the hosted payment feature for self-service ePayment transactions on the classic user interface, 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 9.2: Student Financials)
- Understanding Self-Service Payment Profiles
- *Electronic Payment Integration Developer's Reference Guide* in My Oracle Support (ID 1982664.1).

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

Campus Solutions delivers a set of messages that accompany many of the self-service pages 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. The self service user defined messages are for

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both Classic and Fluid user interfaces. 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 9.2: Student Financials)
- Setting Up Institution Sets
- "Setting Up SF Merchants" (PeopleSoft Campus Solutions 9.2: Student Financials)

Pages Used to Make Self-Service Payments

Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/ Purchases - Make a Payment - Specify Payment Amount	SSF_SS_PMT_ALLOC	Self Service > Campus Finances > Make a Payment > Electronic Payments/Purchases - Make a Payment	Specify the amount to pay toward outstanding charges.
Electronic Payments/ Purchases - Make a Payment - Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Make a Payment - Specify Payment Amount page.	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/ Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Advise students that their payments are 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.
Electronic Payments/ Purchases - Make a Payment - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Make a Payment - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.

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Page Name	*Definition Name*	*Navigation*	*Usage*
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Make a Payment - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.
Electronic Payments/ Purchases - Make a Payment - Confirm Payment	SSF_SS_PMT_SUBMIT	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.	Confirm payment details. This page appears differently for hosted and non-hosted payments.
Electronic Payments/ Purchases - Make a Payment - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Make a Payment - Confirm Payment page.	View successful and declined payment results.

Specifying Payment Amounts

Access the Make a Payment - Specify Payment Amount page (Self Service > Campus Finances > Make a Payment > Electronic Payments/Purchases - Make a Payment).

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.

The Make a Payment - Specify Payment Amount page is the same for hosted and non-hosted payment modes. However, for non-hosted payments, a message about a PIN being required for echeck transactions appears.

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.

Payment Amount Enter different amounts for each of the charges that appear.

pay all charges Click to pay all charges listed.

zero out amounts Click to zero out amounts in the Payment Amount fields.

calculate total Click to calculate the amounts in the Payment Amount fields.

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 are grouped by business unit. If the allocation level that you specified on the Institution Set page is *By Term,* the charge details are grouped by term within the business unit.

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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).

The Select Payment Method 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 9.2: Student Financials)

Redirecting to Hosted Payment Site

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).

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.

The browser message, Browser Requirements link, and Privacy Policy link appear based on the setup on the Electronic Payments and Payment Merchant pages.

See "Defining Electronic Payment Merchants" (PeopleSoft Campus Solutions 9.2: Student Financials).

See Defining Self-Service ePayments for Institution Sets.

Specifying 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.

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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.

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)

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).

This section applies only to non-hosted payment.

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 9.2: 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 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.

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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 9.2: 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

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).

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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).

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.

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).

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.

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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).

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 are routed to Make a Payment pages, where the transaction is completed.

This section discusses how to do the following using the classic user interface:

- 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 9.2: 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.

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Pages Used to Purchase Miscellaneous Items

Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/ Purchases - Purchase Items - Select Campus	SSF_SS_BU_SELECT	• Self Service > Campus Finances > Purchase Miscellaneous Items - Select Campus • Access step 1 of the Purchase Items Wizard.	Select the campus from which to make a purchase.
Electronic Payments/ Purchases - Purchase Items - Select Items	SSF_SS_MISC_PUR	• Self Service > Campus Finances > Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Campus Click the Next button. • Access step 2 of the Purchase Items Wizard.	Enter the quantity of the purchased items.
Electronic Payments/ Purchases - Purchase Items - Confirm Order	SSF_SS_PMT_ITMCONF	• Self Service > Campus Finances > Electronic Payments/Purchases - Purchase Miscellaneous Items - Select Items Click the Next button. • Access step 3 of the Purchase Items Wizard.	Verify the amount and total of the items to be purchased.
Electronic Payments/ Purchases - Purchase Items- Select Payment Method	SSF_SS_PMT_METHOD	Click the Next button on the Purchase Items - Confirm Order page	Depending on whether the institution supports both the eCheck and credit card payment methods, select the method by which to make a payment.
Electronic Payments/ Purchases - Purchase Items - Confirm Payment	SSF_SS_PMT_MSG	For hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Advise students that their payments are 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.
Electronic Payments/ Purchases - Purchase Items - Specify Payment Details	SSF_SS_PMT_CR_CARD	For non-hosted payment only: Click the Next button on the Purchase Items - Select Payment Method page.	Specify either the credit card or eCheck payment details for the current transaction.
What is a Security Code	SSF_CVV_ABOUT	Click the What is a Security Code? link on the Purchase Items - Specify Payment Details page.	Access information about the Security Code that is located on credit cards.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Electronic Payments/ Purchases - Purchase Items- Confirm Payment	SSF_SS_PMT_SUBMIT	For non-hosted payment, click the Next button on the Purchase Items - Specify Payment Details page. For hosted payment, click Continue from the third party site.	Confirm payment details. This page appears differently for hosted and non-hosted payments.
Electronic Payments/ Purchases - Purchase Items - Payment Result	SSF_SS_PMT_RESULT	Click the Submit button on the Purchase Items - Confirm Payment page.	View successful and declined payment results.

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).

Students can make multiple transactions at one time. For term-based selections, current and future terms appear in the grid. Expired terms (based on the term end date) or items that are not within the effective date and expiration date are not available for selection.

If taxes (sales or GST) are included, a separate line item appears 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).

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, see Making Self-Service Payments.

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Using Account Services

This section discusses how to do the following tasks using the classic user interface:

- 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

Page Name	*Definition Name*	*Navigation*	*Usage*
My Bank Accounts	SSF_SS_BANK_VW	Self Service > Campus Finances > Manage My Bank Accounts > My Bank Accounts	View existing bank account details and access pages for adding and editing bank account details.
Manage My Bank Accounts - Bank Location and Currency	SSF_SS_BANK_CNTRY	Click the Add Account button on the My Bank Accounts page.	Specify the country and currency of the bank account.
Manage My Bank Accounts - Add Bank Account Details	SSF_SS_BANK_DET	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.	Set up and edit bank accounts for direct deposit refunds.
Manage My Bank Accounts - Agreement	SSF_SS_BANK_SUB	Click the Next button on the Manage My Bank Accounts - Add Bank Account Details page.	Review the bank agreement.

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Page Name	Definition Name	Navigation	Usage
Manage My Bank Accounts - Result	SSF_SS_BANK_RES	Click the Submit button on the Manage My Bank Accounts - Agreement page.	Confirm bank account details.
Manage My Bank Accounts - Delete Enroll in Direct Deposit - Delete	SSF_SS_DELETE_BANK	Click the Delete icon on the My Bank Accounts - Bank Account Summary page. Click the Delete icon on the Enroll in Direct Deposit - Modify Direct Deposit page.	Delete bank accounts and direct deposits.
Manage My Bank Accounts - Cancel Enroll in Direct Deposit - Cancel	SSF_SS_CONFIRM	Click the Cancel button during the Manage my Bank Accounts or Enroll in Direct Deposit process.	Cancel an action during the Manage my Bank Accounts or Enroll in Direct Deposit process.
My Direct Deposits	SSF_SS_DIRDEP_VW	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.	Access the first step in the enroll in direct deposit process or access the pages to edit existing distributions.
My Direct Deposits - Bank Account Summary	SSF_SS_DIRDEP_CONF	Click the Enroll in Direct Deposit button on the My Direct Deposits page.	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.
Enroll in Direct Deposit - Add Direct Deposit	SSF_SS_DIRDEP_BNK	Click the Proceed to Enroll in Direct Deposit button on the My Direct Deposits - Bank Account Summary page.	Set up direct deposit distribution details.
Enroll in Direct Deposit - Agreement	SSF_SS_DIRDEP_SUB	Click the Next button on the Enroll in Direct Deposit - Add Direct Deposit page.	Review the direct deposit agreement.
Enroll in Direct Deposit - Result	SSF_SS_DIRDEP_RES	Click the Submit button on the Enroll in Direct Deposit - Agreement page.	Confirm direct deposit details.
Account Services - Enroll in Payment Plan - Select Payment Plan	SSF_SS_PPL_SEL	• Self Service > Campus Finances > Enroll in Payment Plan - Select Payment Plan • Access step 1 of the Payment Plan Wizard.	Select a payment plan.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Account Services - Enroll in Payment Plan - Review Installments	SSF_SS_PPL_CALC	• Self Service > Campus Finances > Enroll in Payment Plan - Select Payment Plan Click the Next button. • Access step 2 of the Payment Plan Wizard.	Change the installment amount, number of installments, or both.
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_SUBMIT	• Self Service > Campus Finances > Enroll in Payment Plan - Review Installments Click the Next button. • Access step 3 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.
Account Services - Enroll in Payment Plan - Agreement	SSF_SS_PPL_RESULT	• Self Service > Campus Finances > Enroll in Payment Plan - Agreement Click the Next button. • Access step 4 of the Payment Plan Wizard.	Review the terms of the payment plan before enrolling in the plan.
Account Services - 1098T Tax Form	SSF_SS_1098_SEL	• Self Service > Campus Finances > Account Services - View 1098-T • Access step 1 of the View 1098-T Wizard.	Indicate which tax year to view.
1098-T Consent Agreement	SSF_SS_1098_RESULT	• Self Service > Campus Finances > Account Services - View 1098-T > 1098-T Consent Agreement Click the Submit button. • Access step 2 of the View 1098-T Wizard.	Capture 1098-T consent confirmation.
Account Services - Student Permissions	SSF_SS_PERM_VIEW	Self Service > Campus Finances > View Student Permissions	View student permissions.

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Page Name	Definition Name	Navigation	Usage
Student Permissions - Select Permission Form	SSF_SS_PERM_SEL	• Self Service > Campus Finances > View Student Permissions Click the Grant Permissions button. • Access step 1 of Student Permissions selection.	Select the desired permissions form.
Student Permissions - Permission Form Agreement	SSF_SS_PERM_SUBMIT	• Self Service > Campus Finances > View Student Permissions > Student Permissions - Select Permission Form Click the Next button. • Access step 2 of Student Permissions selection.	Read and agree to the selected permissions form.
Student Permissions - Student Permission Confirmation	SSF_SS_PERM_RESULT	• Self Service > Campus Finances > View Student Permissions > Student Permissions - Permission Form Agreement Click the Submit button. • Access step 3 of Student Permissions selection.	Receive student permission confirmation.
Student Permission Agreement	SSF_SS_PERM_VW_SEC	• Self Service > Campus Finances > View Student Permissions Click the Display Student Agreement link. • Access step 4 of Student Permissions selection.	Review the student permission agreement.

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 9.2: Student Financials)
- Setting Up Institution Sets
- "Setting Up Your Business Unit to Refund Customers" (PeopleSoft Campus Solutions 9.2: Student Financials)

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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. Only active bank accounts are displayed on this page. Students can view, edit, and delete bank account details from this landing 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).

Students access the Bank Location and Currency 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.

If the Bank Location and Currency page is not enabled, students access the Manage My Bank Accounts - Add Bank Account Details 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.

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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 Branch Table in Common Objects (Set Up Common Objects >Common Definitions >Banking >Banks >Branch Table). The Routing Number and Branch fields are populated and are view only—with the values *0150681* (BankID already set

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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 "Setting Up Banks and Bank Branches" (PeopleSoft Campus Solutions 9.2: Student Financials).

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).

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.

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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).

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.

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.

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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 9.2: Student Financials)
- Setting Up Institution Sets
- "Setting Up Your Business Unit to Refund Customers" (PeopleSoft Campus Solutions 9.2: Student Financials)
- *Addendum: Direct Deposit Through AP Refunding* in My Oracle Support (ID 1982664.1).

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.

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).

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.

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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).

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).

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.

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	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 9.2: 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).

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.

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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).

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).

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.

Viewing the 1098-T Form

Access the Account Services - View 1098-T page (Self Service > Campus Finances > Account Services - View 1098-T).

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.

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Use the View 1098–T page to:

- Select the tax year you want to view.
- Access the 1098-T page.

Until you generate a 1098-T form for the current tax year, only previous years are available.

View 1098-T Amount Detail

Access the Account Services - View 1098-T, Box Amount tab.

Use this tab to:

- View the total amounts displayed on the 1098-T statement.
- Access the View 1098- T - Amount Billed page.

Use the View 1098-T- Amount Billed page to:

- 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.

Use the View 1098-T - Prior Year Adjustments page to:

- View prior year adjustments to the amount billed for an aid year.
- Access the View 1098-T - Scholarships or Grants page.

Use the View 1098-T - Scholarships or Grants page to:

- 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.

Use the View 1098-T - Payments Received page to 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.

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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).

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.

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

Access the Account Services - Student Permissions page ((Self Service > Campus Finances > View Student Permissions > Account Services - 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.

The Account Services - Student Permissions 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).

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).

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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).

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).

On this page, the student can read the student permission agreement.

Managing Financial Accounts Using PeopleSoft Fluid User Interface

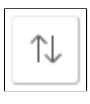
This topic discusses how to do the following using PeopleSoft Fluid User Interface:

- Viewing Account Summary
- Making Electronic Payments
- Viewing Charges
- Managing Direct Deposits
- Viewing Payment History

Related Links

"Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.2: Student Financials)
"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Common Elements Used to Manage Financial Accounts Using PeopleSoft Fluid User Interface



Depending on the page you access, click this icon to sort the rows in ascending or descending order according to the available sort options.

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On smartphones, click this icon to open up the hidden group box that contains links to other menus or pages *or* displays steps pertaining to an activity guide.

This indicates that the results on display have been filtered.

Click to navigate to a page that provides more information.

Pages Used to Manage Financial Accounts Using PeopleSoft Fluid User Interface

Page/Tile Name	*Definition Name*	*Usage*
Financial Accounts Tile	SSF_FIN_ACCT_FL	Access the Financial Accounts landing page. This tile is accessible only if the student is assigned to an institution set. Otherwise, the tile is disabled. See "Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).
Account Balance Page	SSF_ACCT_BAL_FL	View account summary.
Make a Payment Page	SSF_SS_PMT_METH_FL	Make electronic payments.
Charges Due Page	SSF_CHRGS_DUE_FL	Review all outstanding charges and deposits incurred to date, including charge details.
Direct Deposit Page	SSF_DIRDEP_LAND_FL	Enroll in direct deposit or manage bank accounts enrolled in direct deposit.
Payment History Page	SSF_PMT_HIST_FL	View a history of credits posted to your account: payments, deposits, financial aid disbursements, or waivers.

Viewing Account Summary

Navigation

Student Homepage >Financial Accounts >Account Balance

Use the Account Balance page to view a summary of outstanding charges and deposits, pending payments, pending financial aid, and total due.

Due Now The amount that appears consists of outstanding deposits, current due charges, pasts due charges, and charges with a due

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	date in the future but are limited to the (Days in Future) value defined on the Institution Set page.

The information that appears on this page is controlled by the parameters you set up for the institution set.

If the student belongs to multiple business units, the business unit appears in the grid.

On smartphones, the Account Balance page shows only the Charges & Deposits column. Tap on a row to view other details like pending financial aid.

See Defining Basic Institution Set Parameters.

Making Electronic Payments

Navigation

Student Homepage >Financial Accounts >Make a Payment

Use the Make a Payment activity guide to make electronic payments towards your account using credit card or eCheck. The form of payment depends on what your institution accepts.

Depending on your institution's setup, your payments may be allocated to specific charges.

Follow the instructions on the screen to complete your payment.

Note: Newly admitted students can access Make a Payment via a link in the Applicant Fluid Self Service to pay their deposit. See Managing Applications Using PeopleSoft Fluid User Interface.

Viewing Charges

Navigation

Student Homepage >Financial Accounts >Charges Due

Note: Charges without due dates are labeled "Future."

On smartphones

Outstanding charges and their due dates as well as pending financial aid are displayed on a single page. Click a charge or pending financial aid row to view the Detail for Due Date page.

Make a Payment	Click to pay outstanding charges. This invokes the Make a Payment page.

On desktops or tablets

Use the Charges Due page to view:

- a summary of your charges by due date (Summary By Due Date)
- details of your charges due (Detail of Charges Due)
- details of deposits due (Detail of Deposits Due)

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- pending financial aid

If only deposits are due, then Summary By Due Date, Detail of Charges Due, Detail of Deposits Due appear.

If only charges are due, then Detail of Deposits Due does not appear.

Related Links

Setting Up Self-Service Options

Managing Direct Deposits

Navigation

Student Homepage >Financial Accounts >Direct Deposit

Note: Students that set up multiple or single distributions in the classic user interface only see the Balance distribution row. Students are allowed to edit the Balance row. The original agreement continues to be valid; a new agreement is not required.

Use the Direct Deposit page to enroll in direct deposit for the first time or, if you have already enrolled in direct deposit, edit the bank account you enrolled in direct deposit. Only one bank account is allowed to be active in direct deposit for Fluid user interface.

To edit a bank account, click the account row.

Some fields on the Direct Deposit Details page appear only for non-U.S. banks.

Enroll in Direct Deposit	Click to enroll a bank account for direct deposit. The Direct Deposit Details page appears. Use the Direct Deposit Details page to set up a bank account. The Bank Location fields appear only if Allow Change in Country is selected on the SF Institution – General Options page.
Revoke Direct Deposit	Click to deactivate the bank account you enrolled in direct deposit.

Viewing Payment History

Navigation

Student Homepage >Financial Accounts >Payment History

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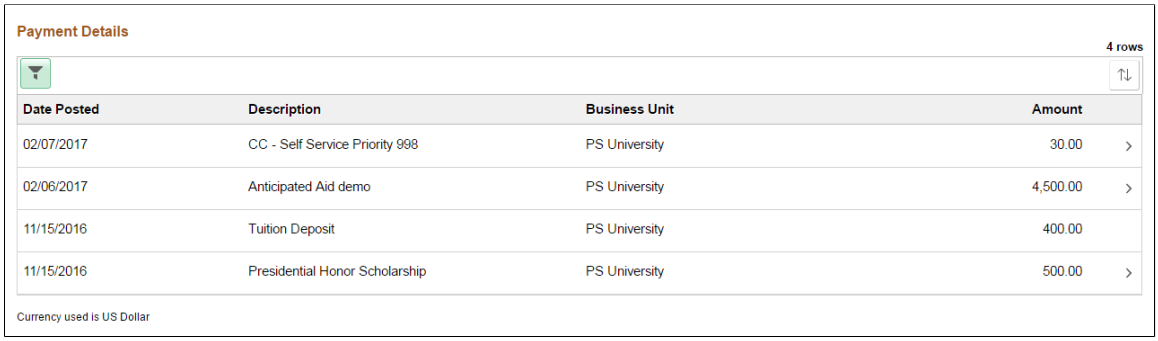
Image: Payment Details page

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



Use the Payment History page to review a history of payments, deposits, financial aid disbursements, or waivers. Pending payments are not displayed in the fluid user interface.

On desktops, laptops, or tablets, clicking some payment rows may bring up the Charges Paid page, which lists the payment breakdown for that particular payment.

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Chapter 24

Using Financial Aid Self Service

Understanding Financial Aid Self-Service

Financial Aid Self Service is accessible using classic or PeopleSoft Fluid User Interface. 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 using the:

- Classic interface, 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.
- Fluid interface, from the Student Homepage click Financial Aid. See "Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

Related Links

Setting Up Self-Service Inquiry Options

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Accepting, Declining, and Reducing Awards

This section discusses how students:

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

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Pages Used to Accept, Decline, and Reduce Awards

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service > Campus Finances > View Financial Aid > Select Aid Year to View Click the View Financial Aid link in the Finances group box on the Student Center page (Self Service > Student Center).	Access award acknowledgment for a particular aid year.
Financial Aid - Award Package	SS_FA_AWD_ACK	Self Service > Campus Finances > Accept/Decline Awards > Financial Aid – Award Package Click the Accept/Decline Awards link in the Finances group box on the Student Center page (Self Service > Student Center).	Accept, decline, and reduce awards.
Financial Aid - Award Detail	SS_FA_AWD_DTL	Click the Award link on the Financial Aid - Award Package page.	View scheduled disbursements by term and for each, the type of award, date, term, and award amount. If set up for lender selection, the student can also select a lender.

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.

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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 is 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.

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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.

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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.

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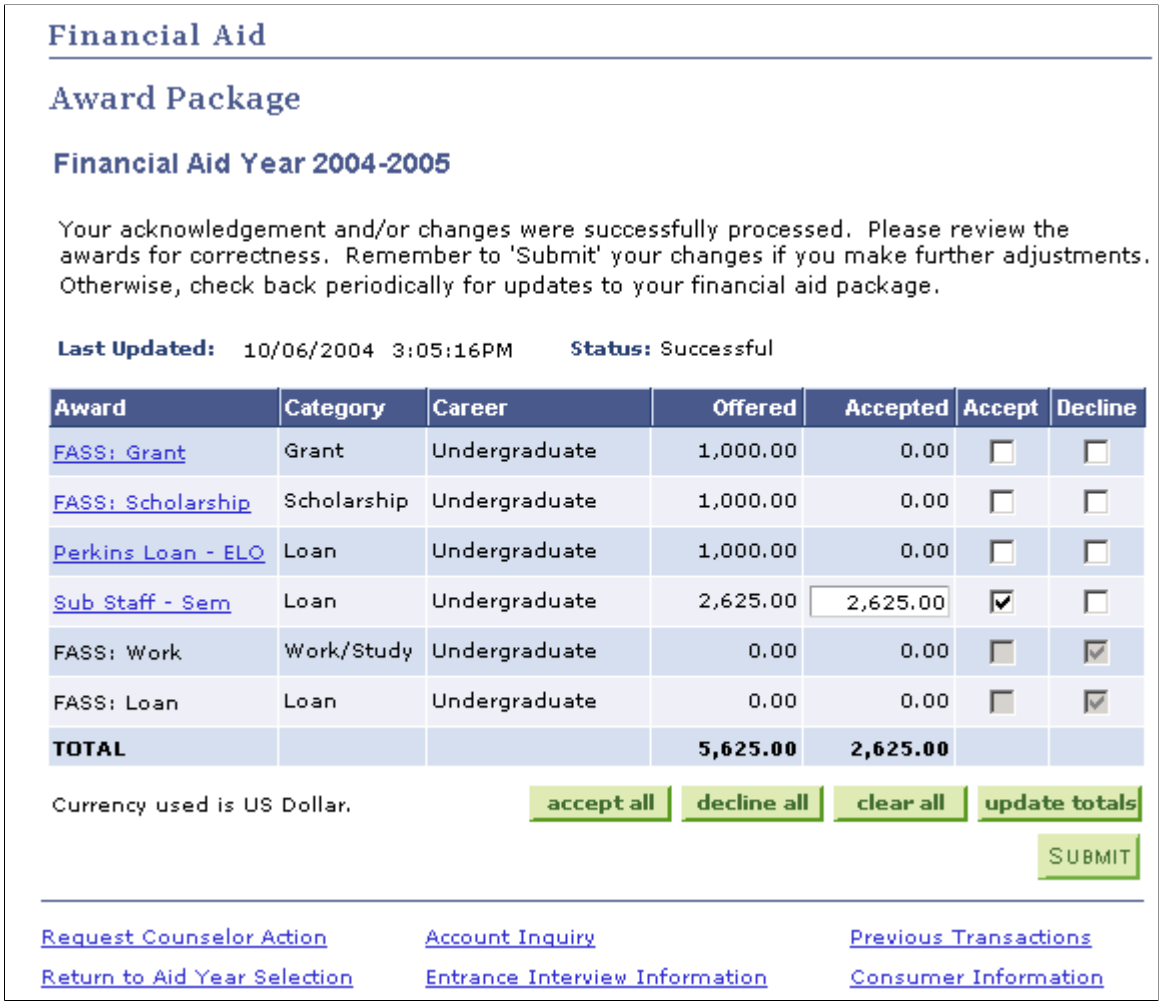
Image: Award Package example

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.



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.

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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

Page Name	***Definition Name***	***Navigation***	***Usage***
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.*
Financial Aid - Other Financial Aid Received	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 *Reported.*
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.
Financial Aid - Aid from Other Sources - Award Detail	SFA_SS_EA_DETAIL	Click the award description to view award details.	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.

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Printing the FE FAN Letter

Important! Financial Aid Notification (FAN) letter is a deprecated product. Support will be maintained for this product, but no new development will be produced for FAN. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

Page Name	*Definition Name*	*Navigation*	*Usage*
Lender Select	SS_LNDR_SELECT	Click the Select Your Lender link on the Financial Aid - Award Detail page .	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.
Selected Lenders	SS_LNDR_SELECT	Financial Aid > Loans > View Lender Selection	View the lenders that students selected through Campus Self Service.

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Viewing a Student's Lender Selection Record

Access the Selected Lenders page (Financial Aid > Loans > View Lender Selection).

The Lender Information tab displays the lender that was selected by the student through Campus Self Service.

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

Page Name	*Definition Name*	*Navigation*	*Usage*
Entrance/Exit Loan Counseling	SS_LN_COUNSEL	Self Service > Campus Finances > View Financial Aid > Award Summary > Loan Counseling link	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.

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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.

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Pages Used as Entry Points into the Perkins eMPN Process

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Award Package	SS_FA_AWD_ACK	Self Service > Campus Finances > Accept/Decline Awards > Financial Aid - Award Package	Accept, decline, and reduce awards. This page also facilitates entry into the Perkins eMPN process.
Financial Aid - Award Detail	SS_FA_AWD_DTL	Click the Federal Perkins Loan – MPN link on the Financial Aid - Award Package page.	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.
Financial Aid - Award Summary	SS_FA_AWD_SUMM_PER	Self Service > Campus Finances > View Financial Aid > Financial Aid – Award Summary	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.
Accept/Decline Financial Aid - Submit Confirmation	SFA_SUBMIT_CONFIRM	Click the Yes button on the Accept/Decline Financial Aid page.	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.

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.

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Select Aid Year to View	SFA_SS_EMPN_AY_SEL	Self Service > Campus Finances > Sign Perkins Promissory Note > Financial Aid - Federal Perkins Master Promissory Note	Select the aid year that you want to view.
Financial Aid - Federal Perkins Master Promissory Note (Introductory Information)	SFA_SS_EMPN_START	Click the Aid Year link on the Financial Aid - Select Aid Year to View page.	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.
Financial Aid - Federal Perkins Master Promissory Note (ID and Consent)	SFA_SS_EMPN_AUTH	Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (Preliminary Information) page.	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.
Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information)	SFA_SS_PERK_EMPN1	Click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (ID and Consent) page.	Verify name, address, telephone, and demographic information.
Addresses	SS_ADDRESSES	Click the Click to update Address link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Update address information.

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Page Name	Definition Name	Navigation	Usage
Phone Numbers	SS_CC_PERS_PHONE	Click the Click to update Phone link on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Update telephone numbers.
Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References)	SFA_SS_PERK_EMPN2	Click the Confirm button on the Financial Aid - Federal Perkins Master Promissory Note (Verify Personal Information) page.	Enter loan references information. User-defined text messages for this page are contained within Message Set Number 14409, 572.
Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness)	SFA_SS_PERK_EMPN3	Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Provide Loan References) page.	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.
Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities)	SFA_SS_PERK_EMPN4	Click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness) page.	Accept borrower's rights and responsibilities. User-defined text messages for this page are contained within Message Set Number 14409, 574–576 series
Federal Perkins Loan Master Promissory Note	SFA_SS_PERK_EMPN5	Click the I Accept button on the Financial Aid - Federal Perkins Master Promissory Note (Accept Borrower's Rights and Responsibilities) page.	Review terms and conditions, disclosure of information, and important notices. Sign the note electronically.
Electronic Signature Confirmation	SFA_SS_ESIGN_YESNO	Click the Sign Perkins Note button on the Federal Perkins Loan Master Promissory Note page.	Captures the borrower's consent to electronically sign the Perkins MPN.
Federal Perkins Master Promissory Note (Completed Signature Confirmation)	SFA_SS_EMPN_CONFRM	Click the Yes button on the Electronic Signature Confirmation page.	View confirmation for completion of the electronic signature process.
Financial Aid - Federal Perkins Master Promissory Note	SFA_SS_EMPN_EXISTS	Select the Aid Year on the Financial Aid - Select Aid Year to View page.	View a message indicating that a valid Perkins Promissory Note is on file.

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Reviewing Perkins eMPN Introductory Information

Access the Financial Aid – Federal Perkins Master Promissory Note (Introductory Information) page (click theAid 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

Access the Financial Aid - Federal Perkins Master Promissory Note (ID and Consent) page (click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (Preliminary Information) page.

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

Access the Financial Aid – Federal Perkins Master Promissory Note (Verify Personal Information) page (click the Continue button on the Financial Aid – Federal Perkins Master Promissory Note (ID and Consent) page).

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).

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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

Access the Financial Aid – Federal Perkins Master Promissory Note (Accept Rights and Responsibilities) page (click the Next button on the Financial Aid - Federal Perkins Master Promissory Note (Review Loan Indebtedness) page).

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.

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
Federal Perkins Master Promissory Note	SFA_SS_EMPN_PAPER	Click the Request Paper MPN link on the Financial Aid - Federal Perkins Master Promissory Note (Preliminary Information) page.	Confirm a request for a paper MPN. The student is requested to print, complete, and return the signed paper promissory note.
Financial Aid - Federal Perkins Master Promissory Note	SFA_SS_EMPN_EXISTS	Click the Continue button on the Federal Perkins Master Promissory Note page.	View a reminder to turn in the signed paper MPN to the financial aid office.

Viewing a Perkins MPN

This section lists the pages used to view Perkins promissory notes.

Pages Used to View a Perkins Promissory Note

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Federal Perkins Master Promissory Note (View MPN Information)	SFA_SS_EMPN_VIEW	Self Service > Campus Finances > View Perkins Promissory Note > Federal Aid - Federal Perkins Master Promissory Note	View Perkins MPN information. User-defined text messages for this page are contained within Message Set Number 14409, 578.
Financial Aid - Federal Perkins Master Promissory Note (Promissory Note History)	SFA_SS_EMPN_HISTVW	Click the View History link on the Financial Aid - Federal Perkins Master Promissory Note (View MPN Information) page.	View Perkins MPN history.

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

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
Financial Aid - Request Counselor Action	SS_FA_AWD_REQ	Click the Request Counselor Action link on the Financial Aid - Award Package page.	Request a change 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.

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.

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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

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

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Page Name	Definition Name	Navigation	Usage
Financial Aid - Loan Application Information	SS_FA_LOAN_DETAIL	Click the Loan Application Information link on the Financial Aid - Award Summary page.	View loan application information. This includes loan status, loan amount, loan fee, net amount, and activity date. A student must have an originated loan in the system for this information to be available.
Financial Aid - Declined Awards	SS_FA_AWD_ALL_CD	Click the View Declined Awards link on the Financial Aid - Award Summary page.	View declined awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Canceled Awards	SS_FA_AWD_ALL_CD	Click the View Canceled Awards link on the Financial Aid - Award Summary page.	View canceled awards by aid year. This view is available if your institution entered *Aid Year* in the *View Summary By* field on the Self Service Options page.
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the View Scheduled Disbursement Dates link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term. The system displays awards that have been offered but not accepted by the student with a blank disbursement date.

Viewing Student Self-Service Pages by Award Period

This section 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

Page Name	Definition Name	Navigation	Usage
Financial Aid - Select Aid Year to View	SS_FA_AWD_AY_SEL	Self Service > Campus Finances > View Financial Aid > Financial Aid - Select Aid Year to View	Select an award period to view.

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

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Page Name	Definition Name	Navigation	Usage
Financial Aid - Scheduled Disbursements	SS_FA_AWD_TERM_DTL	Click the link for the term in the scroll area on the Financial Aid - Award Summary page.	View scheduled disbursements by term. This includes the type of award, the accepted amount, the fee, the net amount, and the scheduled disbursement dates for a particular term.

Managing Financial Aid Using PeopleSoft Fluid User Interface

This topic discusses how students use the PeopleSoft Fluid User Interface to:

- Manage financial aid awards.
- Manage Outside Aid.
- View Financial Aid Summary.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
Understanding Financial Aid Self-Service
Setting Up Disbursement Options
Creating User-Defined Text

Common Elements Used to Manage Financial Aid Using Fluid Interface

This icon indicates that the award is in “Offered” status and requires your decision to accept or decline.

This icon indicates the number of awards in “Offered” status that requires your decision to accept or decline.

Status

See Accepting, Declining, and Reducing Awards Using Self-Service.

(Filter)

Depending on the page you access, click this icon to filter the results according to the available filter options.

(Sort)

Depending on the page you access, click this icon to sort the rows in ascending or descending order according to the available sort options.

Display

Depending on the page you access, select an option to filter the results according to the terms available.

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	Click to view more information.
	Select to enable various fields on the Accept/Decline page. This icon is available only when using a tablet or desktop.
Submit	Click to commit your decision. Before you click Submit, make sure you review your decision, especially the Accept Amount value. Once you click Submit, the action cannot be reversed.
Reset or **Reset All**	Select to clear all decisions or changes you have made to a page.

Pages Used to Manage Financial Aid using the PeopleSoft Fluid Interface

Page/Tile Name	*Definition Name*	*Usage*
Financial Aid Tile	Not Applicable	Access financial aid information.
Select a Value Page	SFA_SS_MD_AYSEL_FL	Select the Aid Year and Institution combination, for which you want to access financial aid information.
Outstanding Offers Page (smartphone only)	SFA_SS_OFFERS_FL	Select to view offered awards. This page is available only when offered awards exist. Once you have decided to decline or accept an offered award, this page disappears from the list. The numerical badge indicates the number of outstanding offers.
Manage Accepted Awards Page (smartphone only)	SFA_SS_AWARDS_FL	Select to view awards you have accepted.
Award Summary Page (smartphone only)	SFA_SS_AWDSUM_FL	Select to view a summary of all financial aid awards (Accepted and Offered) for the selected Aid Year and institution combination using a smartphone. Depending on setup, Canceled and Declined awards may also appear.
Disbursements (smartphone only)	SFA_SS_DISB_SFF_FL	Select to view a summary of disbursement information by term for the selected Aid Year and Institution using a smartphone.
Summary Page (tablet or desktop only)	SFA_SS_AWDSUM_FL	Select to view a summary of all financial aid awards (Accepted and Offered) for the selected Aid Year and institution combination using a tablet or desktop. Depending on setup, Canceled and Declined awards may also appear.

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Page/Tile Name	*Definition Name*	*Usage*
Accept/Decline Page (tablet or desktop only)	SFA_SS_ACPTDECL_FL	Use this page make award decisions.
Disbursements (tablet or desktop only)	SFA_SS_DISB_LFF_FL	Select to view a summary of disbursement information by term for the selected Aid Year and Institution using a table or desktop.
Outside Aid (smartphone only)	SFA_SS_OA_SF_FL	Use this page to view external financial aid the student receives from sources outside of the school. The Report Outside Aid page can be opened from this page.
Outside Aid (tablet or desktop only)	SFA_SS_OA_LF_FL	Use this page to view external financial aid the student receives from sources outside of the school. The Report Outside Aid page can be opened from this page.
Report Outside Aid	SFA_SS_OA_ENTR_SCF	Use this page to report external financial aid the student receives from sources outside of the school.
View Outside Aid	SFA_SS_OA_DTL_SCF	Use this page to view details about an individual external financial aid award the student receives from sources outside of the school.
View College Financing Plan	SFA_SS_SHOPSHET_FL	Use this page to view the student's College Financing Plan (also known as Financial Aid Shopping Sheet prior to Aid Year 2020).
Need Summary (tablet or desktop only)	SFA_SS_NEEDSUM_FL	Use this page to view a summary of the student's need calculation using cost of attendance and expected family contribution by academic period.
Cost of Attendance (tablet or desktop only)	SFA_SS_COA_FL	Use this page to view details the student's cost of attendance by academic period.
Expected Family Contribution (tablet or desktop only)	SFA_SS_EFC_FL	Use this page to view details of the student's expected family contribution by academic period.

Selecting an Aid Year

If you have financial aid for more than one institution and Aid Year combination, the Select a Value page appears.

Use the Select a Value page to select the aid year and institution combination for which you want to view financial aid information.

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When you select an Aid Year:

- From a smartphone, the landing page may display any of these options depending on the status of available awards or whether you have been granted access: Outstanding Offers, Manage Accepted Awards, Award Summary, Shopping Sheet, Disbursements, and Outside Aid.
- From a tablet or desktop, the landing page automatically displays the Award Summary page. You may also be able to access the Accept/Decline page if you have been granted access, or have been offered or have accepted awards.

To select a different Aid Year and institution combination:

- From a smartphone, click the Change button on the landing page.
- From a tablet or desktop, click the Change button.

Managing Offers and Accepted Awards Using a Smartphone

Outstanding Offers Page

The Outstanding Offers link appears on the landing page *only* when you are offered an award.

Click an award row to access the Award Decision page. From the Award Decision page, you can decide to accept or decline an award.

Award Decision — Select to accept or decline the award.

If you accept the award, the Reduce field is enabled *only* for awards that are eligible for reduction. Some awards may have "Accept" conditions that specify you cannot reduce the amount.

Offer Amount — Displays the offered amount.

Reduce — This is enabled only when you accept an award that is eligible for reduction. Use this field to specify a lesser Accept Amount than the offered amount.

Select the check box to enable the Accept Amount field.

Accept Amount — Displays the amount of the award you have accepted. If you accept the award and select the Reduce check box, you can edit this amount.

Once you have made decisions on all offered awards, the Outstanding Offers page disappears from the list of options.

Manage Accepted Awards Page

Use this page to view financial aid awards you have accepted as well as change your decision on any accepted award.

Click an award row to access the Award Decision page. From the Award Decision page, you can choose to decline the award or reduce the amount you want to accept. The fields on the Manage Accepted Awards, Award Decision page are the same as the fields on the Outstanding Offers, Award Decision page.

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Award Summary Page (smartphone only)

Use this page to view all financial aid awards that you have been offered or have accepted.

Depending on your institution's setup:

- Your awards may be separated by award period, for example: Academic Year or Summer Term. Click an award period to view the awards for the particular period.
- You may be able to access the Declined Awards and Canceled Awards pages.

Click an award row to access the Award Details page.

General	This is the default page that appears if the award status is "Offered."
Amounts	This is the default page that appears if the award status is "Accepted". Select to view information about how the award is disbursed across associated terms. If there are multiple terms, the information on this page is displayed based on self-service options. For Loan awards, this page displays the applicable fee deducted from the award.
Loan	This page appears only when loan awards are available. Select to view loan-specific information. Depending on the available loan, the following statuses may appear for: • Perkins Loans: Promissory Note Status • Non-Perkins Loans: Loan Status • Loan Counseling: Entrance Interview, Exit Interview

Note: The Award Details are displayed based on the Display option you choose on the Award Summary page.

Disbursements (smartphone only)

Use this page to view disbursement details for all Offered and Accepted awards by term for the selected Aid Year and Institution.

Depending on your institution's setup, your awards may be separated by award period; for example, Academic Year or Summer Term. Select an award period to view the awards for that particular period.

Managing Offers and Accepted Awards Using a Tablet or Desktop

All Awards pages are accessed from the Awards link on the landing page.

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Summary Page

This is the default page that appears when you click the Financial Aid tile. Use this page to view a summary of available financial aid awards.

Depending on your institution's setup:

- Your awards may be separated by award period, for example: Academic Year or Summer Term. Click an award period to view the awards for the particular period.
- You may be able to access the Declined Awards and Canceled Awards pages.

Click an award row to access the Award Details page. The fields are the same as the Award Details page as accessed from a smartphone.

Accept/Decline Page

Use this page to accept or decline any or all offered awards, or change your decision on accepted awards. If you click an award row, the Award Details page appears. The Award Details page shows general information about the award.

To make or change your decision on an award, click the Edit icon. Various fields and buttons on the Accept/Decline page are enabled. The fields on the Accept/Decline page works similarly to the Award Decision page from the Outstanding Offers and Manage Accepted Awards pages on the smartphone, except for:

Actions	Click to process (accept or decline) all awards. You can also reset all award decisions.

As long as you do not click the Submit button while in Edit mode, you can still change any decision or value on this page.

While you are in Edit mode, if you make a decision on each award *and* you change your mind, to reverse your decision you can either:

- Click the Actions button, then select Reset All. However, this resets all changes you may have made to other award rows.
- Click the Edit button to turn off Edit mode. This resets all award decisions to the state prior to Edit mode.

Disbursements Page

Use this page to view disbursement details for all Offered and Accepted awards by term for the selected Aid Year and Institution.

Depending on your institution's setup, your awards may be separated by award period; for example, Academic Year or Summer Term. Select an award period to view the awards for that particular period.

Managing Outside Aid

The controls for smartphones, tablets, and desktops are the same for managing Outside Aid.

All Outside Aid pages are accessed from the Outside Aid link on the landing page after selecting the Financial Aid tile from the Student Homepage.

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Outside Aid Page

Use this page to view Outside Aid that has already been reported.

If no Outside Aid has been reported, the *Report Outside Aid* button is displayed. Select this button to open the Report Outside Aid page.

If there is Outside Aid that has already been reported, you can report additional Outside Aid by selecting the *Plus icon* in the upper left corner of the table. This opens the Report Outside Aid page.

For Outside Aid that has already been reported and is displayed, you can click on a row in the table to open the View Outside Aid page. This page displays details about the selected Outside Aid.

Report Outside Aid Page

Use this page to report Outside Aid.

Access this page by selecting the *Report Outside Aid* button on the Outside Aid page when there is no existing reported Outside Aid or by selecting the *Plus icon* in the upper left corner of the table when there is existing Outside Aid.

On the Report Outside Aid page, you select the *Award* and *Category* and enter the *Award Description* and *Amount*.

View Outside Aid Page

Use this page to view Outside Aid details.

Access this page by selecting a row on the Outside Aid page.

This page displays details about the selected Outside Aid.

Viewing College Financing Plan

Use this page to view the student's College Financing Plan (also known as Financial Aid Shopping sheet prior to Aid Year 2020).

On a smartphone, access this page by selecting the College Financing Plan link on the landing page and selecting View College Financing Plan.

On a tablet or desktop, access this page by selecting the Awards link on the landing page, selecting the College Financing Plan link, and then selecting College Financing Plan.

Viewing Financial Aid Summary

Note: This feature is only accessible on tablets and desktops, not smartphones.

All Financial Aid Summary pages are accessed from the Financial Aid Summary link on the landing page.

Viewing Need Summary

Use this page to view a summary of the student's need. Depending on your institution's setup:

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- Awards may be separated by award period, for example: Academic Year or Summer Term. Select an award period to view the awards for the particular period.
- Remaining Need may or may not be displayed.

Viewing Cost of Attendance

Use this page to view details about Cost of Attendance. Depending upon your institution's setup, cost of attendance may be separated by award period, for example: Academic Year or Summer Term. Click an award period to view the cost of attendance for the particular period.

Display — Use the Display option to view Term–specific Cost of Attendance information.

Academic Career — Use the filter and sort options to adjust the view for students with multiple Academic Careers. This field is only displayed for students with multiple careers.

Viewing Expected Family Contribution

Use this page to view details about Expected Family Contribution. Information about Academic Year, Summer Term, and Family Contribution (Academic Year plus Summer Term) is always displayed.

Viewing User Defined Page

Use this page to view content customized by the institution instead of the standard Need Summary, Cost of Attendance, and Expected Family Contribution information. This page is available when the Summary Link in Self Service Setup is set to *User-defined Page*.

See Setting Up Self-Service Inquiry Options.

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Chapter 25

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

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

Evaluating Transfer Credit Through Self-Service Pages

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

Understanding the Self-Service Modeling Transfer Credit Feature

The Self-Service Modeling Transfer Credit feature enables users to enter and process "what-if" course transfer credit evaluations over the internet. Students, applicants, prospects, and visitors can use the Evaluate 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.

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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 always evaluates *posted*, *completed*, and *self-reported* transfer credit.

Related Links

"Understanding the Transfer Credit Business Process" (PeopleSoft Campus Solutions 9.2: 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 9.2: Academic Advisement).

- Define academic institutions.

  See "Defining Academic Institutions" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

Pages Used to Evaluate Transfer Credit Through Self-Service Pages

Page Name	*Definition Name*	*Navigation*	*Usage*
Evaluate My Transfer Credit	SS_TRCR_SRCH	Self Service > Transfer Credit > Evaluate My Transfer Credit	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.

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

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

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Page Name	*Definition Name*	*Navigation*	*Usage*
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.

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Chapter 26

Using Academic Advisement Self Service

Prerequisites for Using Academic Advisement Self Service

To take full advantage of the self-service features using the classic user interface, 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 are 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 9.2: Academic Advisement)

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"Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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 is accessible in the relevant area of the report (next to the units required). Similarly, if a course directive (substitution) was made, a Notes column appears 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

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
My Academic Requirements	SAA_SS_DPR_ADB	Self Service, Degree Progress/ Graduation, My Academic Requirements	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.
My Academic Requirements	SAA_SS_DPR_AAL	Self Service, Degree Progress/ Graduation, My Academic Requirements	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.
My Academic Requirements – Course Detail	SSS_CRSE_OFFER_DTL	Self Service > Degree Progress/Graduation > My Academic Requirements Click a course description link.	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.
My Academic Requirements - Course List Detail	SAA_SS_DPR_AAL_WC	Self Service > Degree Progress/Graduation > My Academic Requirements Click a course link.	View details about a course list.

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Page Name	*Definition Name*	*Navigation*	*Usage*
My Academic Requirements	SAA_SS_DPR_ADB_DTL	Self Service > Degree Progress/Graduation > My Academic Requirements Click the numeric link in the Notes column (if applicable). Or, if the exception is a change, click the Note link to view the details of the change.	View a description of any exception or override that affects the course or the requirement group, requirement or requirement line.
What-If Report – What-if Report Selection	SAA_SS_WHATIF_SEL	Self Service > Degree Progress/Graduation > View What-if Report	Student or prematriculated student can view an existing report or initiate the steps to create a new what-if advisement report.
What If Report	SAA_SS_DPR_ADB	Click the report date link on the What-If Report – What-if Report Selection page.	Student or prematriculated student can view a saved what-if report.
What-If Report – Create What-if Scenario	SAA_SS_WHATIF	Click the Create New Report button on the What-If Report –What-if Report Selection page.	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.
What If Report – Select Course for What-if Scenario	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the Create What-if Scenario page.	Student or prematriculated student can select courses for the what-if scenario.

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.

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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

Page Name	*Definition Name*	*Navigation*	*Usage*
Add Classes - Search by My Requirements	SAA_SS_DPR_ADB_SR	Self Service > Enrollment > Enrollment: Add Classes Select the term (as needed). Click the Change button (as needed). Click the My Requirements option. Click Search.	For a selected term, a student can search for classes based on his or her degree requirements.
Add Classes - Course Detail	SSS_CRSE_OFFER_DTL	From the Add Classes – Search by My Requirements page, click a link for a course description.	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.

Viewing Advisee Information Through Self-Service Pages

This section lists the pages used to view advisee information using self-service pages.

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Pages Used to View Advisee Information Through Self-Service

Page Name	*Definition Name*	*Navigation*	*Usage*
My Advisees	SSS_ADVISEE_LIST	Self Service >Advisor Center >My Advisees	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, transcripts and advising notes.
Advising Notes	SAA_SS_ADVNOTE_STU	Self Service >Advisor Center >My Advisees. Click the Advising Notes icon for the respective advisee.	View all advising notes for the selected student, irrespective of who created them.
Advising Notes	SAA_SS_ADVNOTE_ADD	Self Service >Advisor Center >My Advisees. Click the Advising Notes icon for the respective advisee. Click the Create a Note button.	Create an advising note for the selected advisee, based on advisor's access privileges for the particular Note Category
Advising Notes	SAA_SS_ADVNOTE	Self Service >Advisor Center >My Advisees. Click the Advising Notes icon for the respective advisee, and again, click the specific Advising Note icon to view details.	Based on the Advisor's Note Category access: View and update an advising note for the selected advisee. Add or remove attachments to the note. Create or delete related action items. Update note details including advisee access to the note. Send notifications to the advisee with an editable message.
Advising Notes	SAA_SS_ADVNOTE_SUM	Self Service >Advisor Center >My Advisees. Select the my advising notes button	Based on the Advisor's Note Category access, view notes that have been created by or assigned to an advisor. Use filters to search for specific notes.

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Page Name	Definition Name	Navigation	Usage
Advisee's Student Center (search)	SSS_ADVISEE_LIST	Click the View Data for other Students button on the My Advisees page.	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, transcripts and advising notes. 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.
My Advisees - Committee Members	SSS_ADVISEE_COMEMB	Click a committee name on the My Advisees page.	Review committee members, their roles, and their contact numbers.
Advisee Requirements	SAA_SS_DPR_ADB	Click the View Student Details link on the My Advisees page for a student in the list of advisees and on the Advisee Student Center page, under Academics, select Academic Requirement from the drop-down list. Click the Go button.	Advisors can view a student's advisement report.
Advisee Requirements - Course Detail	SSS_CRSE_OFFER_DTL	Click the course description link on the Advisee Requirements page.	Advisors can review course details and, if the student is term activated, view class sections for a specific term.
Advisee Student Center	SSS_STUDENT_CENTER	• Self Service >Advisor Center >Advisee Student Center • Self Service > Advisor Center > My Advisees Click the View Student Details link for an advisee on the My Advisees page or click the Student Center subtab.	Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information. Advisees can select *Advising Notes* from the Academic drop down list to view their notes. Based on advisee access settings, they can update advising notes, add Note items and attachments; and automatically generate notifications to the advisor when they submit an update.

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Page Name	Definition Name	Navigation	Usage
What-If Report – What-if Report Selection	SAA_SS_WHATIF_SEL	On Advisee Student Center > under Academics > select What-if Report from the drop-down list box. Click the Go button.	Advisors can view an existing report or initiate the steps to create a new advisement report for a student or prospective student.
What If Report	SAA_SS_DPR_ADB	Click the report date link on the What-If Report – What-if Report Selection page.	Advisor can view a saved what-if report.
What-If Report – Create What-if Scenario	SAA_SS_WHATIF	Click the Create New Report button on the What-If Report – What-if Report Selection page.	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.
What If Report – Select Course for What-if Scenario	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the Create What-if Scenario page.	Advisors can select courses for the what-if scenario.
Advisee Assignments	SS_LAM_STD_GR_LST	On Advisee Student Center > under Academics > select Assignments from the drop-down list box. Click the Go button.	Advisors can view advisee's assignments and grades.
Advisee Course History	SSS_MY_CRSEHIST	On Advisee Student Center > under Academics > select Course History from the drop-down list box. Click the Go button.	Advisors can view advisee's course history.
Advisee Exam Schedule	SSR_SSENRL_NODATA	On Advisee Student Center > under Academics > select Exam Schedule from the drop-down list box. Click the Go button.	Advisors can view advisee's exam history.
Advisee Grades	SSR_SSENRL_GRADE	On Advisee Student Center, under Academics, select Grades from the drop-down list box. Click the Go button.	Advisors can view an advisee's grades.
Advisee Unofficial Transcript	SSS_TSRQST_UNOFF	On Advisee Student Center, under Academics, select Transcript: View Unofficial from the drop-down list box. Click the Go button.	Advisors can view an advisee's unofficial transcript.

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Page Name	Definition Name	Navigation	Usage
Advisee Transfer Credit	SCC_SUM_TRNSFRCRT	• Self Service > Advisor Center > Advisee Transfer Credit • Self Service > Advisor Center > My Advisees Click the View Student Details link for an advisee. Click the Transfer Credit subtab. • On Advisee Student Center, under Academics, select Transfer Credit: Report from the drop-down list box. Click the Go button.	Advisors can view information such as advisees's course and test credits.
Advisee General Info (general information)	SCC_SUM_PERSONAL	• Self Service > Advisor Center > Advisee General Info • Self Service > Advisor Center > My Advisees Click the View Student Details link for an advisee. Click the General Info subtab.	Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.
Advisee Academics	SCC_SUM_ACADEMICS	• Self Service > Advisor Center > Advisee Academics • Self Service > Advisor Center > My Advisees Click the View Student Details link for an advisee. Click the Academics subtab.	Advisors can view information such as an advisee's career, program, and term summary.
Degree Progress Report	SS_ES_AARPT_TYPE	On Advisee Student Center, select Degree Progress Report from the drop-down list box. Click the Go button.	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.

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Page Name	Definition Name	Navigation	Usage
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	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.
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	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.
Emergency Contacts List	SS_CC_EMRG_CNTCT_L	On Advisee Student Center, under Personal Information, select Emergency Contact.	Advisors can view an advisee's emergency contact information.
Enrollment Dates	SSR_SSENRL_APPT	On Advisee Student Center, under Enrollment Dates, select *details*.	Advisors can view an advisee's enrollment appointments.
Send Notification	SSS_NOTIFY	Advisor Center, My Advisees Select the Notify Selected Advisees or Notify All Advisees button.	Advisors can send notifications to their advisees.
Advisee To Dos	SS_CC_TODOS	On Advisee Student Center, under To Do List, select *details*.	Advisors can view an advisee's to do list summary.
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.

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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 9.2: Student Records)

Pages Used to View Self-Service Advisement Transcripts

Page Name	*Definition Name*	*Navigation*	*Usage*
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service > Degree Progress/Graduation > View Degree Progress Report	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.
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.

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Page Name	*Definition Name*	*Navigation*	*Usage*
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.

Monitoring Academic Progress Using the PeopleSoft Fluid Interface

The Fluid Academic Progress interface provides students with information about:

- Academic Progress
- Course Requirement Alerts
- Expected Graduation Term
- Advisors

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

"Using the Student Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Setting Up Self-Service Features for Academic Advisement

"Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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Pages Used to Monitor Academic Progress Using the PeopleSoft Fluid Interface

Page/Tile Name	*Definition Name*	*Usage*
Academic Progress	SAA_ACAD_PROG (tile) SAA_START_PAGE_F (start page)	Select the Academic Progress tile from the Student Homepage to access Academic Progress Start Page. From the Start Page, you can access the Academic Progress Summary, Academic Progress (detail), Course Requirement Alerts, Expected Graduation Term, and Advisors. If a student is enrolled in multiple academic careers, Academic Progress for different careers can be selected by using the *Change* button.
Academic Progress Summary	SAA_ACD_PRG_SM_FL	This page displays a graphic representation of percentages of Complete, In Progress, and Incomplete units in a student's academic program. This is based on the advisement report type specified in the Academic Institution Table as described in "Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals). The report type specified in the setup will need to be run for each student for the data to appear on this page.
Academic Progress	SAA_ACAD_PROG_FL	This page displays a student's degree progress report for evaluation. It includes graphic representation of percentages complete and grade point average progress. This is based on the advisement report type specified in the Academic Institution Table as described in "Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals). The report type specified in the setup will need to be run for each student for the data to appear on this page.

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Page/Tile Name	*Definition Name*	*Usage*
Course Requirements Alert	SAA_CRS_REQ_ALT_FL	This page displays courses in which a student is currently enrolled that do not count towards completing any academic requirements. These courses will only be displayed up until the Drop (Delete Record) Deadline for the Session Calendar. This is based on the advisement report type specified in the Academic Institution Table as described in "Identifying Self-Service Report Types" (PeopleSoft Campus Solutions 9.2: Application Fundamentals). The report type specified in the setup will need to be run for each student for the data to appear on this page.
Expected Graduation Term	SAA_EXP_GRD_TRM_FL	This page displays a student's Expected Graduation Term from the student's program.
Advisors	SAA_ADVISORS_FL	This displays a student's advisors. Email addresses and telephone numbers can be selected to contact an advisor.

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Chapter 27

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 9.2: 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.

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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

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

Running the My Prospects Process

Access the Outreach Workset Initialization/Maintenance page (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:

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

3. Inserts the selected records into the My Prospects workset on the workset tables AV_WORKSET and AV_WORKSET_MBR for any user 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 9.2: Contributor Relations)

"Maintaining an Organization's Financial Information" (PeopleSoft Campus Solutions 9.2: 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:

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

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

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

Related Links

"Understanding Prospect Management" (PeopleSoft Campus Solutions 9.2: 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.

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Pages Used to Manage an Action Plan

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

Reviewing Reminders

The My Reminders page appears even if 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

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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

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

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Selecting a Prospect Name

Access the Prospect Strategy - Select a Prospect page (Self Service > Outreach > My Prospects > My Stewardship Plans > Add/Update a Strategy).

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.

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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.

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	Assign or view communication records for the prospect.
	Assign or view checklists for the prospect.
	Add a comment or view a list of all comments about the prospect.
	View Family Educational Rights and Privacy Act (FERPA) biographic information for the prospect.
	View details about the service restrictions that are associated with negative service indicators for the prospect.
	View details about the positive service indicators for the prospect.

In addition, the navigation buttons on this page apply to all of the Prospect Strategy pages.

Strategy Detail

In this section, 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.

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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.

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- Send a contact report.
- Send updated biographical information.

Pages Used to Manage Prospect Actions

Page Name	*Definition Name*	*Navigation*	*Usage*
Prospect Action - Select a Prospect	AV_OUTR_SRCH	Self Service > Outreach > My Prospects > My Stewardship Plans > Add/ Update an Action	Search for and select a prospect action record from the My Prospects workset.
Prospect Action - Edit Action	AV_OUTR_ACTN_LIST	Click a name in the Search Results area of the Prospect Action - Select a Prospect page.	Select a prospect action to edit.
Prospect Action - Action Detail	AV_OUTR_ACTN_DTL	Click a link under the Action Description heading or click the Add an Action button on the Prospect Action - Edit Action page.	Enter or update an action step for a prospect. The action step is carried out by the staff member or volunteer.
Prospect Action - Ask Information	AV_OUTR_ACTN_ASK	Click the Next button on the Prospect Action - Action Detail page.	Enter details about an action that includes a donation request (ask). If the action type on the Prospect Action - Action Detail page is not *Ask,* you should skip this page.
Prospect Action - Action Description	AV_OUTR_ACTN_DSCR	Click the Next button on the Prospect Action - Ask Information page.	Enter detailed information related to the action. If the action does not require further description, you can skip this page.
Prospect Action - Assigned Resources	AV_OUTR_ACTN_ASGN	Click the Next button on the Prospect Action - Action Description page.	Assign other resources to the action. If appropriate, you can skip this page.
Prospect Action - Linked Initiatives	AV_OUTR_ACTN_INIT	Click the Next button on the Prospect Action - Assigned Resources page.	Link campaign, event, membership, volunteer, or other initiatives to the action. If appropriate, you can skip this page.
Prospect Action - Summary	AV_OUTR_ACTN_SMRY	Click the Next button on the Prospect Action - Linked Initiatives page.	View and print a prospect action summary.
Prospect Action Results - Select a Prospect	AV_OUTR_SRCH	Self Service > Outreach > My Prospects > My Stewardship Plans > Complete an Action	Search for and select a prospect record from the My Prospects workset that has an action to complete.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Prospect Action - Results - Edit Action	AV_OUTR_RSLT_LIST	Click a name in the Search Results area of the Prospect Action Results - Select a Prospect page.	Select a specific action to complete.
Prospect Action - Results	AV_OUTR_ACTN_RSLT	Click a link under the Action Description heading on the Prospect Action - Results - Edit Action page.	Enter the specific results of a completed action.
Prospect Contact Report - Select a Prospect	AV_OUTR_SRCH	Self Service > Outreach > My Prospects > My Stewardship Plans > Complete Contact Report	Search for and select a prospect record from the My Prospects workset to complete and send a contact report.
Prospect Contact Report - Detail	AV_OUTR_ACTN_CNCT	Click a name in the Search Results area of the Prospect Contact Report - Select a Prospect page.	Enter constituent contact report details.
Prospect Contact Report - Summary	AV_OUTR_ACTN_CSMRY	Click the Printer Friendly Version link on the Prospect Contact Report - Detail page.	View a printable summary of all information on the contact report.
Send Contact Report	AV_OUTR_CNCT_SEND	Click the Send Report button on the Prospect Contact Report - Detail page.	Send a completed contact report to a list of users.
Send BioDemo Update	AV_OUTR_BIO_SEND	Click the Send BioDemo Update button on the Prospect Contact Report - Detail page.	Send updated biographical and demographic data, learned during a prospect contact, to the department responsible for updates to biodemo data.

Selecting a Prospect Name Prior to Managing Prospect Actions

Outreach officers can manage prospect actions by using the three links on the Outreach Home page. Their options are to add or update an action, complete an action, or complete a prospect contact report.

To add or update prospect actions, outreach officers must first access the Prospect Action page, search their prospect 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.

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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) to 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.

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(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.

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:

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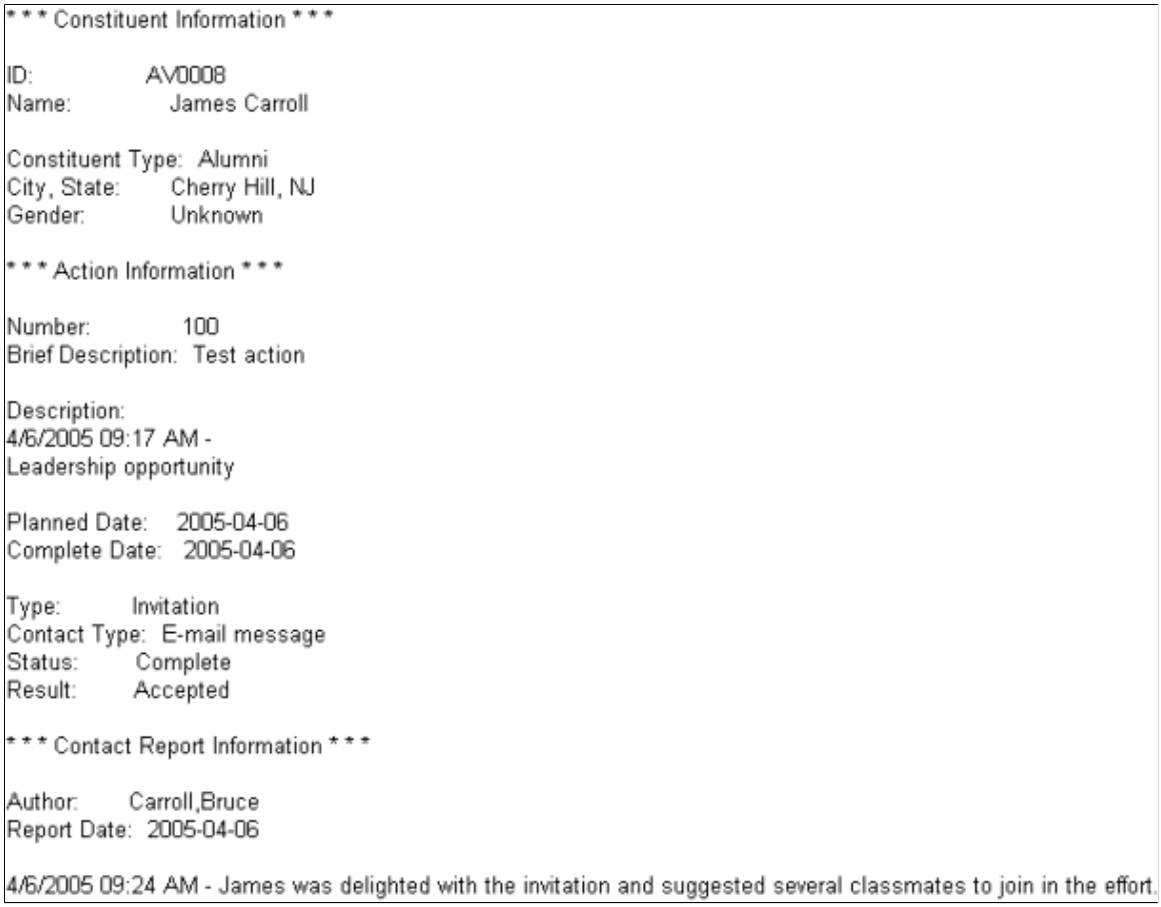
Image: Send contact report example

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: E-mail 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

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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:

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- 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

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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.

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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:

Menu Navigation	***Prospect Information Page***
Self Service, Outreach, View Person Information, Constituent Information	Person Profile
Involvement Summary	Person Profile
Membership History	Person Profile
Audience History	Person Profile
Event History	Person Profile
Volunteer History	Person Profile
Relationship Summary	Person Profile
Communication Summary	Person Profile
Comment Summary	Person Profile
Checklist Summary	Person Profile
Self Service, Outreach, View Person Information, Prospect Information	Strategy Summary
Clearance Summary	Strategy Summary
Personal Assets	Strategy Summary
Ratings Summary	Strategy Summary
Philanthropic Interests	Strategy Summary

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Menu Navigation	*Prospect Information Page*
Donor Appreciation Summary	Strategy Summary
Planned Giving Profile	Strategy Summary
Action Summary	Strategy Summary
Contact Report Summary	Strategy Summary
Prospect Assignments	Strategy Summary
Self Service, Outreach, View Person Information, Giving Information	Giving Profile
Commitment Summary	Giving Profile
Commitment Register	Giving Profile
Transaction Register	Giving Profile
Giving Club Progress	Giving Profile
Open Pledge Register	Giving Profile
Self Service, Outreach, View Organization Information, Constituent Information - Org	Organization Profile
Relationship Summary	Organization Profile
Involvement Summary	Organization Profile
Membership History	Organization Profile
Employee List	Organization Profile
Audience History	Organization Profile
Communication Summary	Organization Profile
Comment Summary	Organization Profile
Checklist Summary	Organization Profile
Self Service, Outreach, View Organization Information, Prospect Information - Org	Strategy Summary
Action Summary	Strategy Summary
Contact Report Summary	Strategy Summary
Clearance Summary	Strategy Summary
Ratings Summary	Strategy Summary

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Menu Navigation	*Prospect Information Page*
Philanthropic Interests	Strategy Summary
Donor Appreciation Summary	Strategy Summary
Prospect Assignments	Strategy Summary
Self Service, Outreach, View Organization Information, Giving Information - Org	Giving Profile
Commitment Summary	Giving Profile
Commitment Register	Giving Profile
Transaction Register	Giving Profile
Open Pledge Register	Giving Profile
Matching Gifts	Giving Profile
Giving Club Progress	Giving Profile
Self Service, Outreach, View Lists	Person Profile
Campaign Prospects	Person Profile
Top Donors	Person Profile
Giving Club Membership	Person Profile
Involvement Roster	Person Profile
Profile Compare	Person Profile
Self Service, Outreach, View Reference Information	Campaigns
Giving Clubs	Campaigns
Designations	Campaigns
Self Service, Outreach, CR Reports	Bio-Bit Report - Person
Bio-Bit Report - Organization	Bio-Bit Report - Person
Bio-Bit Report - Workset	Bio-Bit Report - Person
Designation Donors	Bio-Bit Report - Person
Campaign Progress	Bio-Bit Report - Person
Role Assignments	Bio-Bit Report - Person

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Managing Prospects Using PeopleSoft Fluid User Interface

This topic discusses how to manage constituent and prospect information through PeopleSoft Fluid User Interface.

The search pages used in these Fluid interfaces are populated only with members of the My Prospects workset. For information about the search criteria, see Selecting a Prospect Name.

Related Links

"Understanding PeopleSoft Fluid User Interface Homepages" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)
"Setting Up Contributor Relations Installation Defaults" (PeopleSoft Campus Solutions 9.2: Contributor Relations)

Pages Used to Manage Prospects Using PeopleSoft Fluid User Interface

Page/Tile Name	*Definition Name*	*Usage*
Donor Prospects Tile	AV_OUTR_SRCH_S_FL	Access the Profile, Prospect Actions, and Prospect Strategies pages. See "Using the Contributor Relations Homepage" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).
Profile Page	AV_PRSN_PROFILE_FL	View basic information about the prospect.
Prospect Actions Page	AV_OUTR_ACTN_LI_FL	View all current (incomplete) actions, as well as add or delete an action.
Prospect Strategies Page	AV_OUTR_STRT_LI_FL	View, add, delete strategies.
Person Profile Page	AV_PRSN_PROFILE	Click to access the classic Person Profile page. See "Viewing a Person Profile" (PeopleSoft Campus Solutions 9.2: Contributor Relations).

Common Elements Used in Donor Prospects

Element	*Definition*
	Click to access a list of related actions.
	Click to access a list of pages on the left panel.

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Viewing Prospect Information

Use the Profile page to view information about constituents and prospects.

To access the Profile page:

1. Click the Donor Prospects tile.
2. In Prospect Search, select a prospect by initiating a search.
3. In the search results, do one of the following:
   - Select a prospect's name.
   - Click the Related Actions icon, then select Profiles.

   The prospect's Profile page appears. From the Profile page you can view the prospect's constituent, donor, or prospect profile.

Managing Actions

Use the Prospect Actions page to:

- View all current scheduled actions.
- Edit all current scheduled actions.
- Add an action for the prospect.

To access the Action page, search for a prospect then do one of the following:

- Select a prospect's name.
  1. From a smartphone, click the left panel icon then select Prospect Actions.

     From a desktop or laptop, select Prospect Actions from the left panel.
  2. Select an action.

- Click the Related Actions icon next to the prospect's name, then select Prospect Actions.

The Action page appears. From the Action page, you can view more information about the action, update action details, or delete an action.

Note: You cannot delete actions with related attributes. To delete an action, you must remove the related attributes.

Managing Strategies

Use the Prospect Strategies page to:

- View all strategies that exist for the prospect.
- Edit existing strategies.

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- Add a strategy for the prospect.

To access the Strategy page, search for a prospect then do one of the following:

- Select a prospect's name.

  1. From a smartphone, click the left panel icon then select Prospect Actions.

     From a desktop or laptop, select Prospect Strategies from the left panel.

  2. Select a strategy.

- Click the Related Actions icon next to the prospect's name, then select Prospect Strategies.

The Strategy page appears. From the Strategy page, you can view more information about the strategy, update its status, add or delete initiatives, and link actions to the strategy.

Related Links

"Understanding Initiative Management" (PeopleSoft Campus Solutions 9.2: Contributor Relations)

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Chapter 28

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 does 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

Page Name	*Definition Name*	*Navigation*	*Usage*
Community Directory Load	CAMPDIR_RUNCNTL	Set Up SACR > Product Related > Community Access/Directory > Community Directory Load	Generate online directories.

Generating Online Directories

Access the Community Directory Load page ((Set Up SACR > Product Related > Community Access/Directory > Community Directory Load).

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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.

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Pages Used to Search the Directories

Page Name	*Definition Name*	*Navigation*	*Usage*
Community Directory Search	SRCH_CD_TYPE	Self Service > Community Directory Search	Specify the community directory and criteria to search.
Community Directory for Students	SRCH_STDNT_CRIT	On the Community Directory page, select *Student Directory* and enter criteria for which to search.	View the search results obtained from the Student Directory and enter fields to perform a new search.
Community Directory for Employees	SRCH_STAFF_CRIT	On the Community Directory page, select *Employee Directory* and enter criteria for which to search.	View the search results obtained from the Employee Directory and enter fields to perform a new search.
Community Directory for Alumni	SRCH_ALUMN_CRIT	On the Community Directory page, select *Alumni Directory* and enter criteria for which to search.	View the search results obtained from the Alumni Directory and enter fields to perform a new search.
Student Profile	STDNT_PROF_SEC	Click the student's name on the Community Directory for Students page.	View data in the directory profile for that person.
Employee Profile	STAFF_PROF_SEC	Click the employee's name on the Community Directory for Employees page.	View data in the directory profile for that person.
Alumni Profile	ALUMN_PROF_SEC	Click the alumnus name on the Community Directory for Alumni page.	View data in the directory profile for that person.

Specifying the Directory to Search

Access the Community Directory Search page (Self Service > Community Directory Search).

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

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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).

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.

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Chapter 29

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 9.2: 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:

See *PeopleTools: Applications User's Guide*, Using PeopleSoft Application Pages, Using WorkCenter Pages

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Chapter 30

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 9.2: Campus Community)

Related Links

"Managing Notification Preferences" (PeopleSoft Campus Solutions 9.2: Campus Community)

Page Used to Manage Notification Preferences in Self Service

Page Name	*Definition Name*	*Navigation*	*Usage*
Notification Preferences	SS_CC_NTF_PREF	Self Service >Campus Personal Information >Notification Preferences	Set and update notification preferences.

Setting and Updating Self-Service Notification Preferences

Access the Notification Preferences page (Self Service >Campus Personal Information >Notification Preferences.

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

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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 are not 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 9.2: Campus Community)

Page Used to View Notifications

Page Name	*Definition Name*	*Navigation*	*Usage*
Notification Center	SS_CC_NTF_CENTER	Self Service >Notification Center	Self-service users view notifications.

Viewing Notifications in the Notifications Center

Access the Notifications Center page (Self Service >Notification Center).

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.
- 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.
- The Push tab displays the name of the application which sent the notification, the importance, and the message text.
- 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

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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.

- The Notification Center page includes a 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 appear, the Period selector is highlighted in red to alert the user that the date range is filtered.

- The Details link takes the user to a detailed view of each notification.

  The Notification Details 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.

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Chapter 31

(GBR) Using DLHE Self-Service Survey

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.

Status	***Description***
New	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.
Saved	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.
Submitted	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.
Coded	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 *New* or *Saved* to *Coded* 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 *Saved* or *Submitted* surveys to *Coded* once additional coding had been done and the survey was deemed complete.
Excluded	For administrative users only. This status is used to indicate records that should be excluded from the survey population. The survey responses are retained.

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Status	*Description*
Duplicate	For administrative users only. This status indicates records should be excluded from the survey population. Survey responses already recorded are retained and not deleted.

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 9.2: Student Records)
"Preparing for Generating DLHE Return" (PeopleSoft Campus Solutions 9.2: 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 9.2: Student Records).

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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.

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:

Section	***Used for***
Section A	Specifying whether the student is employed or undertaking further study, training or research on the census date.
Section B	Entering employment details.
Section C	Entering information concerning teaching experience.
Section D	Entering information concerning further study, training or research.
Section E	Entering information concerning the student's overall higher education experience.

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Section	*Used for*
Section F	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 "Configuring HESA" (PeopleSoft Campus Solutions 9.2: Student Records) for information about the Allow incomplete submission and Require mandatory questions check boxes.

For more information on how administrative users use the DLHE self-service pages, see "Adding, Viewing, and Updating Surveys" (PeopleSoft Campus Solutions 9.2: Student Records).

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